

MOVING CLOSER: EUROPEAN VIEWS OF THE INDO-PACIFIC

Frédéric Grare, Manisha Reuter

September 2021

SUMMARY

- The launch of the EU's strategy for the Indo-Pacific should mark the beginning of a new approach to the region.
- But ECFR research shows that, despite the Indo-Pacific's growing economic and political importance, many member states are still largely uninterested in events there.
- It will take more than just strong support from France, Germany, and the Netherlands to ensure that the new EU strategy for the Indo-Pacific is effective in the long term.
- The three countries have an opportunity to convince other member states that the region is vital to European sovereignty and prosperity.
- They can do so by creating visible projects that demonstrate their presence and intent in the Indo-Pacific, and by establishing coalitions for greater European engagement in areas such as technology and maritime security.

Introduction

The world's economic and political centre of gravity has been shifting towards the Indo-Pacific for years. With China playing an increasingly dominant role in everything from trade to military power and technology, the relative decline of American supremacy is palpable. This poses a new challenge for Europe, whose economic future and geopolitical relevance is inextricably linked to developments in Asia.

It has been decades since policymakers across Europe focused intensively on any strategic development in the Indo-Pacific that did not involve trade. Since the early 2000s, the European Union has been busy dealing with issues at home or in its immediate neighbourhood.

The concept of the “Indo-Pacific” first emerged within the region – particularly in Japan and Australia – and reshaped the previously dominant “Asia-Pacific” narrative, mainly as a way to articulate these countries' requirements for prosperity vis-à-vis China and their reliance on the US security guarantee. The Trump administration appropriated the concept and gave it a distinctly anti-China connotation. Until last year, the EU had not engaged with the idea of the Indo-Pacific on a broad conceptual basis, let alone defined its policy priorities for the region. The union feared that doing so would indicate alignment with the US and would alienate China. Therefore, the notion that there was an Indo-Pacific to deal with had gained little traction in Europe. But several EU member states have now begun to push Brussels to embrace the Indo-Pacific as a strategic concept.

France, Germany, and the Netherlands have, in different ways, drawn up national Indo-Pacific strategies in recent years. They have been the driving force behind the EU's effort to find a more decisive approach to the region. This effort led to the release in April 2021 of the European Council's conclusions on the “EU Strategy for Cooperation in the Indo-Pacific”, which paved the way for the union to adopt an official strategy that can now initiate a new approach. To move from the drawing board to implementation, Europeans will need to answer several tough questions that are in tension with the consensual language of EU documents.

Can the EU really ‘get strategic’ about its interests and its member states’ priorities in the Indo-Pacific? Beyond countries that have a clear preference for a more active approach, are any member states strongly opposed to greater European engagement in the region? Will indifference prevail, or has the EU undergone a strategic awakening that will recentre its policymaking on the region’s enormous potential for European interests? (A question that applies to areas ranging from trade to the defence of the rules-based order, to the European Green Deal, to infrastructure finance and development assistance.) And what role does the China factor play?

It will likely take more than a strong push from France, Germany, and the Netherlands to ensure that the EU implements a long-term strategy in the Indo-Pacific. So, where do member states stand on these issues?

This paper draws on a survey that the European Council on Foreign Relations carried out to understand how key policy stakeholders in each member state view the prospect of a new form of European engagement with, and conceptual framing of, the Indo-Pacific. The results of this expert survey show that, despite the region’s growing economic and political importance, indifference to it prevails in many EU member states. This suggests that those leading the debate should make a greater effort to present a convincing story about why Europe should be active in the Indo-Pacific and how it can engage more effectively with its partners in the region – aiming to make use of its own strengths in a world of increasing great power rivalry.

The results of the survey highlight the intensity – or lack thereof – of the debate about the Indo-Pacific in each member state. These differences could eventually limit the impact of any strategic reorientation. There is a risk that the EU’s approach to the Indo-Pacific will be no more than the sum of disparate policies that are only weakly linked and that have no capacity to generate new partnerships between Europe and Indo-Pacific countries and organisations. To prevent this from happening, key players will have to turn the strategy into reality.

The data indicate that they can do so: given that indifference is a bigger issue than real opposition among member states, it should be possible to establish more decisive and visible European positions on Indo-Pacific matters. If select groups of member states create visible projects that signify their presence and seriousness in the region, they can generate momentum for greater European engagement – and thereby strengthen European sovereignty and prosperity. In this context, the Indo-Pacific strategy can be important to how Europe reshapes its role in the world.

An emerging strategy

In April, the Council of the EU released its conclusions on the “EU Strategy for Cooperation in the Indo-Pacific” and the 27 EU foreign ministers formally invited Josep Borrell to present a new, fully fledged strategy for the region by September 2021. By EU standards, this was an achievement – 20 months earlier, the term “Indo-Pacific region” was not even used in official documents in either the EU or its member states. One exception was France, which had developed its own strategy in 2018 (before revising it in 2021) and had been pushing ever since for the adoption of an EU-level equivalent. With regard to its overseas territories in the region, France is the only European country that sees itself as a “resident power” in the Indo-Pacific. Without such a role, other member states seemed wary of formally adopting the concept. This is due to its geopolitical connotations. Germany’s release of its “Policy guidelines for the Indo-Pacific region” in September 2020, soon followed by the Netherlands’ own guidelines, marked the beginning of a demonstration on the part of countries beyond France that one does not need to be a resident power to have, and clearly formulate, one’s interests in the Indo-Pacific.

The debate on the region has, therefore, now begun to gain traction. It has ultimately led to the release of the Council’s conclusions – which will, in turn, result in an actual EU strategy. The publication of the conclusions needed to be approved by all 27 EU foreign ministers, meaning that every member state was forced to deal with the issue of the Indo-Pacific at this level.

The speed of the shift, though, is symptomatic of a change in perceptions of international power relations and their potential impact on Europe. Europeans have been forced into a rethink by their fears about the consequences of China’s rise – and by their uncertainty about the United States’ commitment to European security and its willingness to protect European interests from the potentially negative consequences of the Sino-American rivalry. Together, these factors point to the centrality of the China question – leading to increasingly difficult questions about the posture the EU should adopt vis-à-vis Beijing. And, while the transatlantic relationship cooled significantly during the Trump era, Beijing’s geopolitical activities – from its “mask diplomacy” during the covid-19 pandemic to its actions in Hong Kong and Xinjiang – have dispelled Europeans’ relative optimism about the future trajectory of EU-China relations. There has been a significant rise in pressure on Europe to adjust to the increasingly polarised and tense relationship between China and the US.

So far, Europeans have fallen short in their efforts to articulate a response to these developments. The US strategy for the Indo-Pacific explicitly names China as a “strategic rival”. In contrast, the national strategies of France, Germany, and the Netherlands seek to avoid difficult positioning on the China

question by insisting on “inclusivity” – suggesting that Beijing should be more of a partner than a rival. The real division within Europe, though, does not seem to concern whether China is part of the Indo-Pacific concept. Rather, it involves two opposing approaches to inclusivity. The first approach reflects nothing more than a desire to avoid the China question by insisting on the need for cooperation with all, and by glossing over the potentially problematic aspects of the relationship. The second approach acknowledges conflicts of interest and differences in values with Beijing, but nevertheless calls for continued cooperation with China, as a way to push Beijing to adhere to internationally accepted standards and forms of behaviour.

The division that runs through Europe’s ambivalent approach to Beijing comes from fundamental differences in the ways that member states address the China challenge. This becomes particularly obvious when one compares the French strategy with the German guidelines. The French insisted from the beginning on the need to prevent the emergence of a new hegemon and to re-establish a “level playing field” in Europe’s relations with China. However, the German text only carefully alludes to the notion of countering China and devotes significantly more attention to the economic opportunities offered by the Indo-Pacific “region” rather than to the underlying security questions.

The survey

ECFR’s pan-European network of national researchers conducted qualitative interviews with stakeholders in their respective EU member states. The stakeholders included policymakers, members of parliament, relevant ministries, and leading experts from academia and the not-for-profit sector. A questionnaire was designed to help facilitate the interviews and produce comparable results. The answers selected were predefined in a survey but were chosen on the basis of researchers’ overall assessment of views in their member states. Participants’ responses only relate to the EU’s emerging strategy, and may differ from national preferences.

The French had been pushing for an EU strategy since 2018, but it was only after the publication of the German guidelines that enough momentum was generated for other member states to endorse the Indo-Pacific concept. The fact that the two countries, as well as the Netherlands, jointly pushed for a pan-European strategy eased the process. Yet it did nothing to eliminate the divides between European states in their willingness to stress their differences with China. Nor will the EU’s resulting

Indo-Pacific strategy. While it is still unclear how significant the strategy will be, this will be determined by two things: its content and, ultimately, its implementation. Europe will need to set measurable goals and work to achieve them by making a sustainable financial and security commitment to the region.

It is remarkable that the EU has got as far as it has. Member states do not yet even agree on a geographical definition of the Indo-Pacific or what the concept means. The Indo-Pacific is not a predetermined space in which one can apply the national strategies of states – let alone a European strategy. Instead, the specific interests of states shape their understanding of what and where the Indo-Pacific is. This is by no means an academic debate. Divergent definitions indicate divergent interests – and, potentially, varying degrees of involvement in the creation of an EU Indo-Pacific strategy. More importantly, these differences in countries' concepts of the Indo-Pacific as a geographical area could limit their participation in policies.

Views of the geography of a strategic concept

Where is the Indo-Pacific?



European countries face many of the same challenges as their partners in the Indo-Pacific. And geography is relatively unimportant on some of these issues, such as the potential risks of emerging technologies, ensuring supply chain resilience, countering disinformation, and managing China's growing assertiveness. Therefore, Europe's new outlook on the Indo-Pacific stems from a political recognition of the need to shoulder greater global responsibility. But it also reflects a desire to have an

impact on the affairs of a region that is far away but whose fate is intertwined with Europe's own.

The strategic significance of an EU Indo-Pacific strategy

Europe's divisions over how to approach the Indo-Pacific clearly emerge in ECFR's expert survey. Ten EU member states from across the continent view the adoption of an Indo-Pacific strategy as both a way to deal with China and a way for Europe to take advantage of new economic and other opportunities. But, for 13 states, the Indo-Pacific concept is merely a field of opportunity to pursue economic interests, and the China question does not figure prominently. Only Latvian policy elites appear to see an upgrade of Indo-Pacific policy as truly an anti-China tool. This split reflects member states' differing views about whether to consider the Indo-Pacific in strategic terms or economic terms. As many of them lack major military capabilities, they may assume that the broader geopolitical shift taking place is one that can be dealt with only by larger EU member states or the US. Some may not even have strong economic connections but may assume this would still be the main way to engage with the Indo-Pacific. The lack of consensus is illustrative of the ambivalence in Europe about how or even whether to devise a comprehensive and strategic approach to the region.

You can see the [Indo-Pacific strategic scorecard](#) on ECFR's website.

In terms of how the question relates to the transatlantic partnership, 11 member states regard the adoption of an EU Indo-Pacific strategy as an assertion of "European strategic autonomy" – Europe striking out on its own, without the need for the US to support it. Eight view it as a way of managing the transatlantic alliance – potentially keeping the US engaged as Washington focuses more on the Pacific rather than on Europe. Six countries see the launch of an EU Indo-Pacific strategy as part of an explicit effort to align with the US and support it in the region. These views are not mutually exclusive. And, ultimately, the emerging strategy has not expressed a clear geopolitical position on why the EU is drawing up new plans. While a clearer articulation of its stance could no doubt prove controversial, it would be necessary to ensure the strategic approach has a backbone that holds the whole concept together.

If any pattern is to be discerned, western European countries tend to perceive the coming launch of an Indo-Pacific strategy as an assertion of strategic autonomy, as do the Czech Republic and Slovakia. In contrast, almost all countries that see the creation of an Indo-Pacific strategy as a sign of alignment with the US were once members of the Soviet bloc. The one exception is Portugal. But many states categorise the launch of the Indo-Pacific strategy in more than one way. Western European states tend to view the prospect of an EU Indo-Pacific strategy as both a way to manage the transatlantic alliance and an assertion of strategic autonomy; eastern European states regard it as a way to manage the transatlantic alliance and align with the US.

But this geopolitical positioning goes far beyond the transatlantic dimension. When asked which

partners in the region the EU should work with to ensure its strategy succeeds, only five countries name the US – the same number as those that select India. Even after Brexit, the United Kingdom receives seven mentions. This could be because several states – especially those in eastern Europe and the Baltic region – implicitly rely on the US to ensure the security of their interests in the Indo-Pacific. Accordingly, they may take this cooperation as a given. But it might also be the direct consequence of the launch of the UK’s Integrated Review only a few weeks before the survey was conducted; the document had a strong focus on the Indo-Pacific and a consistency of intent that is difficult to achieve in a union of 27 countries. The perception may also have been reinforced by Britain’s past colonial relationship with significant parts of the Indo-Pacific region, creating the impression that it is an important player with which close ties are not only possible but also likely.

Remarkably, 12 EU member states name China among their top three key partners in the Indo-Pacific. This is logical, as a number of European states still see China primarily as a potential market. That said, five countries – Belgium, Bulgaria, Latvia, Portugal, and Romania – also define the Indo-Pacific strategy as being at least partly an anti-China tool.

The Association of Southeast Asian Nations (ASEAN) emerges as the most popular candidate for cooperation in the Indo-Pacific: 21 countries regard the organisation in this way. Supporting the ASEAN-led regional architecture makes strategic sense from an EU standpoint, because strong relations with several partners in the region may also support EU member states’ posture against China’s political influence. Europe clearly favours a multilateral approach to foreign policy – as opposed to the bilateral one Beijing prefers. Therefore, engaging with individual members of ASEAN such as Indonesia, Vietnam, and the Philippines does not appear to be a priority for most European governments. European countries see other multilateral formats as significantly less potent – each received only one mention: the Asia-Europe Meeting (Cyprus), the Indian Ocean Rim Association (Italy), the Community of Portuguese Language Countries (Portugal), and the South Asian Association for Regional Cooperation and the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (Sweden).

The EU and security in the Indo-Pacific

For Europe as a trading power, the security dynamics that matter most in the Indo-Pacific region are playing out in the maritime realm. When speaking about maritime security, EU countries often focus on the security of the sea lines of communication. But the concept of maritime security is evolving to cover far more than guarantees of safe passage for commercial vessels. Europe needs to focus on the protection of not only maritime routes but also freedom of navigation, the exclusive economic zones of several actual and potential partner countries, the oceans, data traffic through undersea cables, and marine biodiversity.

You can see the interactive [Indo-Pacific security scorecard](#) on ECFR’s website.

As ECFR's survey shows, 23 EU member states consider security, broadly defined, to be an important component of an EU strategy for the Indo-Pacific. Only four states see security as unimportant to such a strategy. Those that characterise security as "very important" for an EU Indo-Pacific strategy are mainly from eastern Europe and the Baltic region: the Czech Republic, Estonia, Latvia, Lithuania, Romania, and Slovakia. Estonia, Latvia, and Romania explicitly link this assessment to their relationship with the US. This relates to the importance they ascribe to the US as a partner in general and the understanding that supporting Washington in a range of policy areas will strengthen the American commitment to providing security in Europe. The survey results suggest that Latvian policy elites think the US should be an explicit part of any European approach to the Indo-Pacific.

The US dimension is also key for some states that view the security dimension of the EU strategy for the Indo-Pacific as "somewhat important". Finland, for example, explicitly refers to the importance of cooperating with like-minded countries such as the US. For Belgium and Bulgaria, there is a strong connection between China's rise and the security dimension of an EU Indo-Pacific strategy. But there are also outliers: Portugal appears to be against linking any security strand to specific interstate territorial or maritime disputes. Surprisingly, France – which is the most militarily engaged EU country in the Indo-Pacific – sees the security dimension of the EU strategy as only "somewhat important". ECFR's research suggests that this dimension ought only to complement France's own security policies, in which cooperation with the US – as well as Australia, India, and Japan – is an important component.

Interestingly, the US factor also influences thinking in countries that see security as unimportant for the EU strategy for the Indo-Pacific. Lithuania has little security interest and capacity in the region, but it agrees that it is important to include security in a future Indo-Pacific strategy – as this may help sustain the United States' involvement in Europe. Overall, the importance of security to the EU strategy for the Indo-Pacific is, explicitly or implicitly, a function of its value in demonstrating dedication to the alliance with the US, thereby securing the American commitment to Europe. These considerations at least partly explain why states with limited military capacities to dedicate to the Indo-Pacific – the Czech Republic, Estonia, Lithuania, Luxembourg, Poland, and Slovakia – support the idea of the EU increasing its investment in maritime security activities in the region. It is questionable whether this will translate into an actual mobilisation of resources from these countries for security in the Indo-Pacific. However, political support from these countries could be useful if the EU wants to build a coalition of individual EU states, one that commits to doing more to defend European interests in the region.

The survey asked what types of security cooperation or support member states would like the EU to invest in, as well as those to which they are ready to contribute. Twenty-one states view cyber security as a priority for the EU – more than see maritime security in this way. Their perceptions could be partially explained by the fact that Indo-Pacific maritime security involves only a limited direct threat

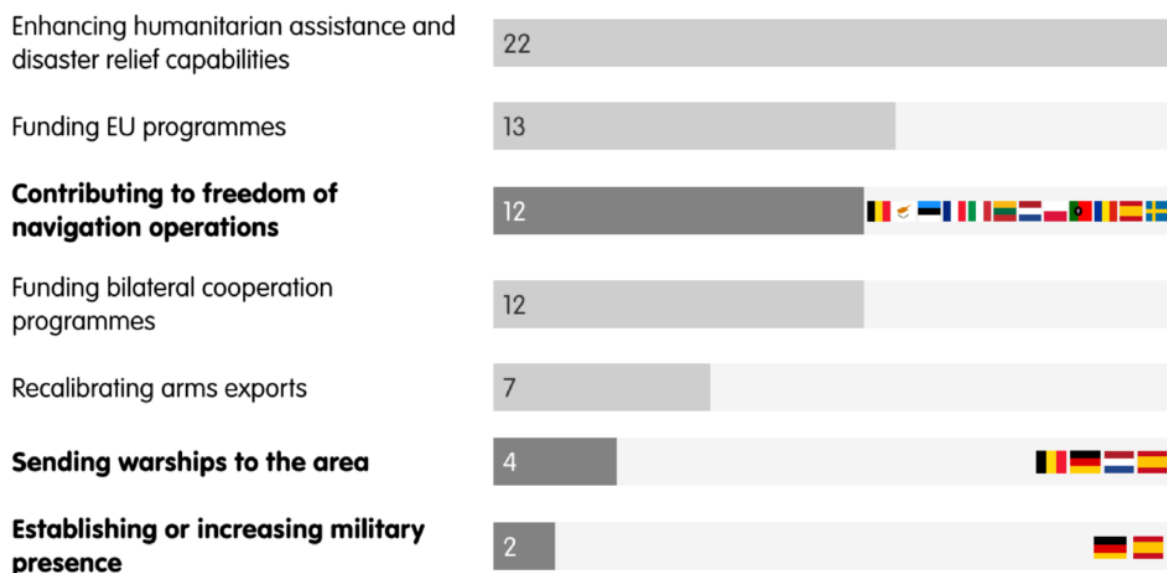
to European territorial sovereignty and integrity, while the immediate effects of cyber attacks are already palpable in Europe itself. Equally, cyber security is an area in which there could be a huge opportunity to not only strengthen Europe's defensive capabilities at home but also enhance European security through information exchange with partners in the region that face similar challenges.

Austria, Bulgaria, Croatia, Cyprus, the Czech Republic, Denmark, France, Germany, Greece, Italy, Luxembourg, the Netherlands, Poland, Slovakia, and Sweden say that counter-terrorism should be included as part of the security dimension of any future strategy. This may be because of these countries' history of terrorist attacks on their territory.

Stating that security is important is one thing, but how many countries are prepared to put their money where their mouth is? Only a limited number of member states are willing to contribute to maritime security activities. Twelve states are prepared to participate in freedom of navigation operations, but only Germany and Spain say they are willing to establish or increase their military presence in the Indo-Pacific. And both are ready to send warships to the region – as are Belgium and the Netherlands. With only these countries happy to contribute, there may be a disconnect between actions that countries recognise as important and the means they are willing to commit to them. This could mean that the EU will make little active contribution to the security of the Indo-Pacific. But it could also serve as an incentive for the EU to become involved in Indo-Pacific security based on its actual capacities – such as by, for example, helping littoral states in the region control their exclusive economic zones.

Putting your money where your mouth is

Countries that would support a maritime security pillar of the EU's Indo-Pacific strategy by...



Question: "If an EU Indo-Pacific strategy were to be adopted with a maritime security pillar, would your country be willing to support it by..."

ECFR · ecfr.eu

In this context, policymakers in some member states also highlight the link between maritime security and support for the sustainability of the oceans. Fisheries management is of particular importance, as this activity is an economic, environmental, and – increasingly – geopolitical issue. As demonstrated by long-standing territorial disputes between China and neighbouring countries in the South China Sea, fisheries management contributes to the evolution of the strategic landscape. This landscape is characterised by not just the military balance of power – an area in which Europe has clear deficits that it can hardly address in the short term – but also a mixture of capabilities to deal with various challenges.

By including the issue of fisheries in an Indo-Pacific strategy, the EU would not only do justice to European interests in this realm but would also establish a presence in a contentious area in which it has ample experience. Fisheries management is a highly relevant issue in the region and has enormous security implications. It is one in which Europe can be of value beyond its military capacity and can help contribute to security by supporting multilateral approaches that are non-confrontational, inclusive, and consistent with EU interests and values.

Similarly, most member states are ready to contribute to humanitarian assistance and disaster relief

capabilities. Thirteen states are willing to contribute funds to EU operations, and 12 are willing to operate through a bilateral cooperation programme, in these areas. These last two options are not mutually exclusive: eight countries are willing to contribute to both EU and bilateral cooperation programmes. This suggests that Europe has options when it comes to engaging with the region – and that it can support its Indo-Pacific partners through both bilateral and multilateral engagement as appropriate.

The survey data indicate that member states generally support an increased European commitment to maritime security in the Indo-Pacific, but that only a few of them are willing to dedicate military capabilities to protecting European interests. There is a clear preference for limiting involvement to non-military activities. The EU will continue to lack credibility on ‘hard security’ in the region. But, even if its non-military contributions are not decisive, it could still be an important source of support for its partners in the region as they manage a multitude of new security scenarios.

Diversifying economic relations and developing markets

The Indo-Pacific is key to global growth. Currently, it is the second-largest destination for exports from the EU and home to four of the bloc’s top ten trading partners. In 2019 the region accounted for more than 40 per cent of Germany’s non-European trade in goods – a share that will only increase (particularly during the post-coronavirus recovery). India, for instance, is the world’s largest openly accessible data market. And, by 2025, India and Indonesia will collectively account for almost 25 per cent of the world’s data users.[1]

The vast majority of EU member states see the Indo-Pacific as an area of huge economic opportunity. At a time of increasing great power rivalry and enormous localisation pressure in China, there is a growing need for diversification within the region away from the dominant Chinese market. This is particularly true for German industry, which is heavily involved in the Chinese markets and deeply intertwined with China through its supply chains. German companies have woken up to this challenge and are also pushing for a diversification agenda, reinforcing the political dynamic at the EU level.

You can see the interactive Indo-Pacific economic development scorecard on ECFR’s website.

As shown by ECFR’s survey, nine member states – Austria, Belgium, Bulgaria, Croatia, the Czech Republic, Lithuania, Poland, Portugal, and Romania – regard enhanced economic engagement with the region as not only part of a diversification strategy but also a tool to counter China.

In EU member states’ bilateral relations with countries in the region, differing assessments of China – of how to constrain or accommodate the country – are currently less relevant. However, as soon as the EU wants to act jointly and use its collective leverage and resources, these differences could create significant tensions. This holds true for inclusive multilateral trade agreements and the EU’s oft-mentioned connectivity strategy.

Connectivity

Connectivity – as defined by Brussels in the EU-Asia connectivity strategy – is intended to bring countries, people, and societies closer together. It is supposed to facilitate closer economic and personal relationships. ‘Hard’ connectivity includes the construction of physical infrastructure, electricity transmission systems, and the bases for data transfers; ‘soft’ connectivity includes people-to-people exchanges and the harmonisation of regulatory standards to enhance cross-border trade. Connectivity is one of the key areas in which the EU can enhance cooperation and deepen its relationship with the Indo-Pacific.

The adoption of the EU-Asia connectivity strategy by the European Commission in September 2018 came to feature prominently on the evolving EU agenda on the Indo-Pacific. This was widely interpreted as an attempt to provide countries in the region with an alternative to Beijing’s Belt and Road Initiative. European officials view connectivity as a geopolitical tool that can help promote the strategy, interests, and values of the EU in the Indo-Pacific by enhancing the EU’s strategic autonomy and its ability to act. But the wide range of topics that fall under the broad definition of “connectivity” also means that individual member states are often driven by very different priorities.

When asked to describe the nature of the debate on connectivity, 12 EU member states reported that the domestic discussion on the issue was rudimentary or non-existent. Among those reporting that debates on connectivity were taking place within their country, 11 stated that they focused on digital and transport issues, while seven said that energy was the main concern – underlining a focus on hard connectivity that produces tangible structures such as roads, bridges, and energy grids. Six countries see trade as the key feature of connectivity.

When asked how to choose connectivity infrastructure projects in the region, 19 states said that European economic interests should be the main priority. This rests on the prevailing logic in Europe that projects should only be funded if they are economically viable and sustainable. It also is indicative of the commercial opportunities for European companies in this context. European companies have not played a massive role in China’s Belt and Road Initiative, meaning that they have been missing out on market share and massive public spending. Only four countries directly said that countering China should be a priority of Europe’s connectivity push in the region. But the interviews ECFR conducted in ten countries – Austria, Belgium, Finland, France, Germany, Hungary, Latvia, Lithuania, Poland, and Slovakia – indicated that China or the Belt and Road Initiative serve at least as a backdrop for the strategic thinking on connectivity in the Indo-Pacific region.

From trade as strategy to trade versus strategy?

For decades, trade and investment have been at the heart of Europe’s approach to the Indo-Pacific, and have dominated its relationship with countries in the region. Does Europe, following its Indo-Pacific awakening, want to become a strategic partner for these states? And how important will trade

be in their relationships?

The results of the survey indicate that most EU member states still mainly view the Indo-Pacific as a region of economic opportunity. But as the covid-19 pandemic has laid bare the risks of globalised supply chains and markets, deglobalisation trends are becoming more apparent around the world. Some countries in Europe have remained relatively immune to this: ECFR's survey indicates that Cyprus, the Czech Republic, Greece, Italy, Malta, the Netherlands, and Slovakia believe that the benefits of globalisation outweigh its costs.

However, as this paper's country reports show, there has only been a debate on deglobalisation in 19 member states (in differing forms and intensities), correlating with their exposure to international trade. In most countries, the debate has revolved around how to balance the risk of overdependency, notably on China, and the vulnerability of supply chains with the risk that deglobalisation will have a negative impact on their economies, resulting in a loss of global market share, international business, and jobs at home.

As such, the survey shows that European countries largely see the globalisation debate as a search for ways to manage risk and better balance national and international interests – leading to considerations about opportunities to modernise national industries and, often, about reshoring or nearshoring, as well as the 'reindustrialisation' of Europe. This debate is sometimes opportunistic: some countries hope to benefit from nearshoring by major European producers such as Germany, which might decide to relocate their production facilities from China and other Asian countries to states closer to home. Overall, though, the survey suggests that debate in Europe focuses more on trade diversification than on reshoring production capacities. This is partly due to the difficulty of moving production away from China. It is also due to the fact that growing demand in south and south-east Asia means that there will be an increasing number of customers close to the site of production.

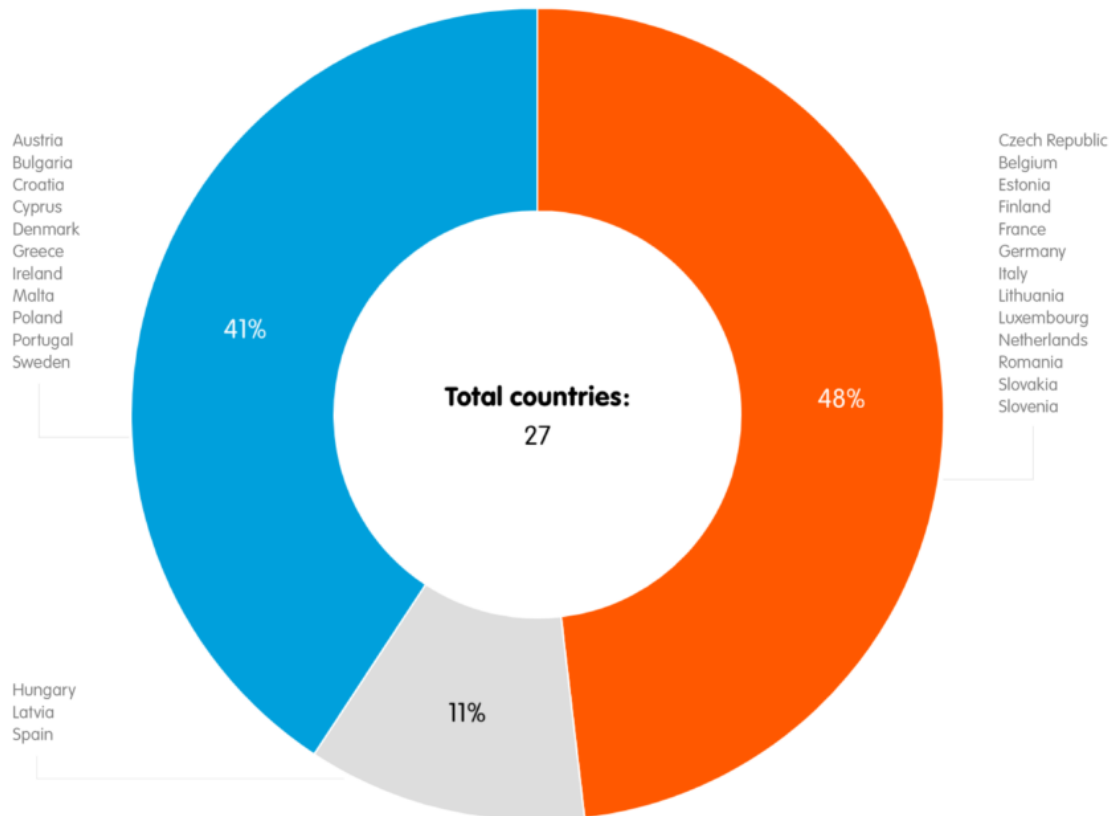
These considerations are also reflected in the preferences EU member states express about potential trade agreements between the EU and Indo-Pacific countries. Their views on the matter are particularly important in the context of an EU strategy for the Indo-Pacific, as the union's competencies in trade allow it to act in a more unified fashion than it can in most other areas. Additionally, trade agreements involve not only economic but also geopolitical interests, as they encompass a broad set of values, norms, and standards. The EU has engaged in a broad push to sign additional free-trade agreements (FTAs) in the Indo-Pacific region since the effective failure of the Doha round negotiations at the World Trade Organization (WTO) in 2008. This has already led the EU to conclude FTAs with countries such as Japan, South Korea, Singapore, and Vietnam, and to negotiate with a number of others, including Australia and Indonesia. Within the scope of its latest Indo-Pacific push, the EU restarted negotiations with India in 2021. A multitude of bilateral FTAs, however, is only the second- or third-best option. In the absence of a reformed WTO structure, these

FTAs serve European interests in supporting free and equal trade, while adding important new areas such as data and digital trade to the regulatory framework. A broader FTA that encompassed many states in the Indo-Pacific – and that harmonised the trade environment for European businesses active in the region – would be preferential to a series of bilateral arrangements. Such a deal would make it easier to do business across a larger geographical space and different legal environments. But, so far, this has not been possible.

In this sense, Europeans' attitudes towards the possibility of an FTA with China, and China's inclusion in larger trade agreements that the EU may conclude in the Indo-Pacific, are significant. EU member states are divided on these issues. Ten of them support the conclusion of an FTA with China or the inclusion of the country in an all-encompassing agreement. Policy elites in Austria, Bulgaria, Croatia, Cyprus, Denmark, Greece, Ireland, Malta, Poland, and Sweden believe that China cannot or should not be excluded from potential trade agreements with the EU. However, they express some ambivalence on the issue. Senior officials in Bulgaria, for example, fear that China could sabotage an all-encompassing trade agreement by putting pressure on other Indo-Pacific actors.

Willingness to include China in trade agreements In per cent

- Express scepticism about striking free trade agreements of any kind with China and emphasise the need to expand trade links beyond China to diversify the trade
- Don't know
- Support the conclusion of a free trade agreement with China or the country's inclusion in the latter in an all-encompassing agreement



Question: "Should the EU negotiate additional bilateral free trade agreements or an all-encompassing one in the Indo-Pacific? Should these include China?"

ECFR · ecfr.eu

Unsurprisingly, however, 14 member states' scepticism about China's potential participation in EU trade agreements reflects ambivalence more than principled and blunt opposition. In Belgium, for instance, key stakeholders suggest that the country would support the conclusion of a trade agreement with China conditioned on Beijing's respect for international law. Stakeholders in Finland and Portugal express similar views, declaring that China should not be excluded but ought to be held to the same standards as others. It appears that the Netherlands would make a deal with China conditional on the latter adopting the standards and norms that Europe incorporates in all its free-trade arrangements – ranging from environmental protection to labour rights and data privacy. German policymakers do not openly question a comprehensive trade relationship with China but do

emphasise the need to extend its trade links beyond the country, aiming to strike the right balance between rivalry and partnership. Their French counterparts express political concerns about including China in a future trade agreement.

There is a broad consensus in attitudes towards the overall approach the EU should adopt. All member states support the conclusion of bilateral FTAs with countries such as Australia, Indonesia, Japan, and India rather than all-encompassing agreements – which are more complex, lengthier, and sometimes unrealistic. Eleven countries see ASEAN as one of the top three entities with which the EU should aim to create an FTA. Eight would rank members of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership as key partners. But, even for a country such as Germany, which has made the conclusion of an FTA with ASEAN one of the objectives of its own policy guidelines on the Indo-Pacific, such an agreement should only be the outcome of a gradual process in which the creation of a network of FTAs will be the basis of a future interregional agreement between the EU and ASEAN.

The quasi-consensus among the 27 EU member states on a high-standards agreements may make it difficult for the EU to conclude FTAs with groupings of any kind. At least 25 member states agree that there is a need for strong environmental standards, intellectual property protections, competition regulations, and measures on subsidies or state-owned companies. These preferences are already reflected in the way in which the EU concludes FTAs in the region, generally by negotiating with a number of smaller, less developed countries. The union's FTA with Vietnam stands in contrast to this. The fact that the EU has been able to conclude this agreement suggests that it is the gold standard for FTAs with a developing economy in the region.

Technology

Against the backdrop of the strategic rivalry between the US and China, competition over technology is set to become a major area of friction between states. More than any other domain, technology presents EU member states with a dilemma in which their relative weakness is difficult to address. To foster digital governance based on international norms and standards, Brussels will need to work closely with its like-minded partners in the Indo-Pacific. The EU has already acknowledged the region as critical to Europe's digital interests – and is, therefore, widely expected to include technology in a comprehensive Indo-Pacific strategy.

There is no discernible pattern in member states' priorities on technology. Fifteen countries regard the issue of 5G as important within Europe, but only Sweden and Latvia view 5G partnerships – which, in the past few years, have been at the centre of EU discussions on the connectivity strategy – as the top priority. Research and development cooperation is the top priority for nine countries and the lowest priority for seven others. Concern about cyber security is not concentrated in any geographical area, with Croatia, the Czech Republic, Finland, and Slovenia regarding it as their top priority. Seven countries – among them Denmark, France, the Netherlands, and Slovakia – list cyber

security among their two lowest priorities for the technological dimension of the EU's Indo-Pacific strategy.

Conclusion

ECFR's survey confirms the centrality of the China question to Europe's relationship with countries in the Indo-Pacific and its foreign and economic policymaking more broadly. The EU's Indo-Pacific awakening has been largely prompted by shifting geopolitical realities and changes in its relationship with China – as well as developments within the country.

The EU's long-term strategic approach to the Indo-Pacific will need to account for these drivers. Concerns about China appear to shape all the views that member states expressed on the potential components of Europe's future engagement with the region. Most member states are not significantly dependent on trade with China. Yet the Chinese market's potential as a future source of growth and prosperity looms large across Europe, often affecting member states' willingness to clearly position themselves on contentious policy issues.

As China's growing assertiveness and rivalry with the US increase tensions in the Indo-Pacific, it will be increasingly hard for Europeans to remain neutral. However, the results of the survey suggest that European capitals have not yet fully understood the significance of the strategic shifts that have taken place in the region and the effects they will have on Europe's capacity to act. Instead, a sense of economic opportunity and the notion of strategic neutrality often prevail among member states – as seen in their overwhelming support for partnering with multilateral organisations such as ASEAN. Only France, the Netherlands, and Germany have the security capabilities and the willingness to protect Europe's interests related to the rule of law and stability in the region, as well as to provide military support to countries there that face increasing challenges to their territorial and economic sovereignty. Some other European countries (particularly the Baltic states) recognise the security challenges in the Indo-Pacific but are likely unable to help address them in a significant way.

Leaders in member states and the upper echelons of the EU are increasingly aware that greater strategic engagement with the Indo-Pacific is crucial to defining Europe's role in the world, but most of them currently intend to do so at a minimal cost. Few are willing to push this logic to its conclusion. In this context, many European capitals conceive of strategic autonomy as an assertion of neutrality – the ability to not have to choose between the US or China – rather than as a way of leveraging the collective power of Europe's strategic partners and actively shaping decisions and the political environment.

This is evident on issues such as connectivity, for which there is no clear set of criteria for the initiation, administration, and financing of projects identified by EU member states. Most member states favour a purely economic approach rather than a strategic one. This approach, which is in line with the business interests of some European companies, could create a policy to foster green and

sustainable growth, as well as labour rights and other forms of European standards-setting. The same factors that have hindered the EU-Asia connectivity strategy could ensure that this issue is irrelevant to Europe's overall approach to the Indo-Pacific – if a lack of measurable outcomes, such as visible connectivity projects, convinces third parties that there is no reason to adopt European norms and standards.

Similar strategic confusion prevails on almost all matters, including technology and trade. In both cases, the challenge created by China's rise is becoming clearer, but the EU is yet to take a more assertive approach to the Indo-Pacific or clearly prioritise its partners in the region.

Ultimately, there is a real risk that Europe's strategic approach to the Indo-Pacific may be no more than a set of principles without any real substance to back them up. This would convey no real political message to either friend or foe.

In the near future, the EU may still need to take a cautious approach to the region, to ensure that its engagement remains commensurate with its evolving capabilities. But the new strategic landscape makes it increasingly clear that neutrality is no longer an option. The EU and its member states will have to acknowledge their differences with China even more directly than they already do.

In the current context, it is unlikely that all member states will agree on a single concept of the Indo-Pacific and, accordingly, develop common and consistent policies on all its components. Instead, EU member states should adopt an approach that uses the forthcoming EU Indo-Pacific strategy as a framework in which to develop policies that will be implemented by various European coalitions. This could enhance Europeans' capacity to act, increase Europe's visibility in the region, and underscore the EU's willingness to play an active role in shaping the emerging geopolitical dynamics.

The creation of an Indo-Pacific strategy is a remarkable step forward for the EU and most member states – but it remains a self-centred effort. Europe should work more closely with Indo-Pacific countries to shape its longer-term approach. It will be key for Europe to understand its Indo-Pacific partners' differing expectations. Making these expectations known and understood is the responsibility of the partners themselves. An institutionalised consultation process could help the EU move from strategy – which serves as a starting point for a new approach – to effective and mutually beneficial implementation. The EU's connectivity partnerships with India and Japan show how an institutional dialogue, if done right, can lead to real change and can lend Europe greater visibility and political weight in the Indo-Pacific.

It would be unrealistic to expect all 27 member states to suddenly engage with issues such as maritime security, for example, when they lack the basic assets to do so (and acquiring these assets would take years of sustained development and investment). But European countries can focus on high-demand, if slightly more niche, contributions in line with their capacity – fisheries management being a case in point.

Limited capabilities can no longer serve as an excuse for inaction. The development of an effective

strategy on the Indo-Pacific will take years; Europe will not address all issues at the same pace. But Europeans no longer have the luxury of ignoring these challenges. The adoption of an Indo-Pacific strategy is dictated by necessity. It is not a choice between confrontation or accommodation vis-à-vis China. It is a choice between carefully balancing the relationship with China or capitulation – between asserting oneself on the international scene or becoming irrelevant.

Europeans would be well advised to look at the strategic constraints of some of their main economic and strategic partners in the Indo-Pacific, including Australia, India, and Japan. All these countries are much more economically dependent on China, and are at much greater security risk due to geographical proximity. None of them can afford to provoke Beijing, but they all know that complacency is no solution. Each of them has developed an Indo-Pacific strategy to balance economic necessity with security imperatives. None of them has better capabilities than Europe. But, equally, none regards Chinese hegemony as inevitable. All of them maintain some level of economic and political engagement with China while looking for security guarantees in their respective partnership with the US and, increasingly, building coalitions with one another. Therefore, it would make sense to discuss the implementation of the forthcoming EU strategy with each of them.

Ultimately, the process of developing an EU Indo-Pacific strategy has been inherently valuable. It has triggered a debate in Europe beyond France, Germany, and the Netherlands and thereby moved the Indo-Pacific up the European agenda. It is reasonable to expect that the process of bringing forward this strategy will contribute to a more accurate awareness of both Indo-Pacific dynamics and their importance for Europe – as well as a new mindset that could lead to more coherent and significant policies. As Europe gradually abandons a naive China policy, this could be a historic opportunity to fulfil the potential of a pan-European approach to the Indo-Pacific.

Analysis by country

Austria

View of the Indo-Pacific

Austria's Indo-Pacific policy is led by its federal chancellery, which regards the goal of a joint EU strategy on the region as somewhat important to its defence and foreign policy goals. The chancellery views the strategy as both an opportunity to pursue European interests in the region and as an anti-China tool. For Vienna, the European Union's strategy on the Indo-Pacific should be driven by an assertion of European strategic autonomy that aims to protect EU economic interests, address coercion by systemic rivals, and promote environmental sustainability. As such, Vienna's vision for the Indo-Pacific encompasses the entire region, stretching to the west coast of the Americas.

EU Indo-Pacific strategy

Vienna supports the EU's adoption of an Indo-Pacific strategy as a means to not only protect European interests in the region but also contain Beijing. Austria generally emphasises cooperation with democratic nations, prioritising partnerships with South Korea, the United States, and Japan rather than China. The exceptions are Australia, which it does not prioritise, and the Association of Southeast Asian Nations (ASEAN) – which it does prioritise, but which includes a mixture of democratic and authoritarian countries.

European security

Security plays a crucial role in Austria's engagement with the Indo-Pacific, particularly with regard to the security of supply chains – which have been dramatically affected by the covid-19 pandemic – and freedom of navigation. Against this backdrop, Vienna supports security investment in cyber, counterterrorism, crisis management, and conflict mediation. As a landlocked country, Austria attributes limited importance to the sustainability of fisheries management and maritime sustainability. Nevertheless, should the EU Indo-Pacific strategy include a maritime security pillar, Austria would welcome an approach focused on humanitarian assistance and disaster-relief capabilities, as well as funding for cooperation programmes, which it would implement both bilaterally and through the EU.

Economic development

Austria sees connectivity as primarily an instrument of influence and coercion, as well as part of

development. Moreover, the Austrian public debate on connectivity prioritises the creation of digital and transport infrastructure, and is particularly concerned with energy and transport, digital connectivity, supply chains, human capital, and efforts to offset China's influence. From this perspective, the implementation of multilateral standards for quality infrastructure investment should be regulated by the G20 Principles on Quality Infrastructure Investment and managed through international organisations in Vienna. Funding for connectivity projects should mainly come from countries in the region and the EU. On technology, Austria regards data governance and cyber security as the main priority, and is relatively unconcerned about the future of labour and research and development.

Although Vienna remains wary of free trade agreements (FTAs) in general, it would prefer to pursue a bilateral FTA between Brussels and Beijing rather than an all-encompassing one in the Indo-Pacific. Domestically, discussions about the need to establish a legal framework for the diversification of supply chains are driven by citizens – particularly in relation to environmental standards, which Austrians rank as “very important” alongside climate protection, social standards, fair competition, and regulations on subsidies and state-owned enterprises.

Belgium

View of the Indo-Pacific

In Belgium, discussion of Indo-Pacific is led by the Ministry of Foreign Affairs, which sees the goal of achieving a joint European approach to the region as moderately relevant to the pursuit of its defence and foreign policy. The Belgian government views the Indo-Pacific as stretching from the east coast of Africa to the west coast of the Americas, believing that the EU should protect its economic interests across the region.

EU Indo-Pacific strategy

Belgium sees the adoption of an EU Indo-Pacific strategy as an opportunity to manage the transatlantic alliance and develop an anti-China strategic tool. The Belgian government reasons that it is best to keep its friends close and its enemies closer – in the sense that active engagement with China should help it monitor the country's rise up close. Belgium wants to form key partnerships with democracies in the Indo-Pacific, including the United States, India, Japan, South Korea, and Australia.

European security

Belgium perceives security operations in the Indo-Pacific as only mildly important, especially in

relation to China. The Belgian government's multifaceted approach to Beijing is shaped by a wariness of China's rise (which has been heightened by the pandemic); an awareness of issues such as Chinese espionage and threats to freedom of navigation; and a desire not to alienate China, whose support is vital to policy in a range of areas, from diplomacy with North Korea to climate change and trade. In the Indo-Pacific more broadly, Belgium supports greater European investment in maritime, cyber, and environmental security; crisis management and conflict mediation; freedom of navigation operations; humanitarian assistance and disaster-relief capabilities; the deployment of warships; and marine sustainability under the framework of climate protection. The country would also like to recalibrate European arms exports.

Economic development

Belgium's public debate rarely touches on the EU's connectivity strategy but, when it does, it frames this in terms of measures to contain an increasingly threatening Beijing. The Belgian government wants the strategy to act as a counterweight to China's Belt and Road Initiative, promote national and EU exports, and support sustainable development. Belgium would like Europeans to pursue these goals with funding from a combination of sources but with an emphasis on the EU. It believes that Europe's approach to the Indo-Pacific should focus on key digital technologies, followed by transport infrastructure – focusing on projects suited to European economic interests – and climate change. Seeing the Indo-Pacific as the most dynamic region in the world, Belgium believes Europe should pay particular attention to research and development, as well as cyber security and data governance. The country is open to competition on 5G equipment but will be cautious in equipping sensitive sectors with this technology.

Recent events such as the pandemic and the accident that blocked the Suez Canal have ignited a debate in Belgium about the need for reshoring and the reindustrialisation of Europe. Given the Belgian economy's reliance on exports, these debates will likely die down. Against this backdrop, Belgium would accept bilateral free-trade agreements with democratic states in the region, but would have serious reservations about one with China.

Bulgaria

View of the Indo-Pacific

Bulgaria's public debate on the Indo-Pacific is limited to the work of non-governmental entities and independent scholars, often within the broader context of the EU's approach to US-China tensions. As a result, Sofia would welcome a strategy for joint European engagement with the region – which it regards as stretching from the east coast of Africa to the west coast of the Americas – based on

economic interests, regional threats to the EU's strategic interests, and environmental considerations.

EU Indo-Pacific strategy

Bulgaria regards the EU's Indo-Pacific strategy as providing both opportunities for Europe, as an anti-China strategic tool, and as a means to manage the transatlantic alliance. Sofia believes that it is relatively important to strengthen ties with democratic countries in the region, and would welcome greater engagement with the Association of Southeast Asian Nations (ASEAN) and its member states – especially against the backdrop of EU-ASEAN negotiations on a free-trade agreement. Bulgaria sees the United Kingdom, China, and Japan as the EU's key partners in the region.

European security

Bulgaria would welcome an EU security role in the Indo-Pacific only if it was counterbalanced by an equal effort at a cooperation dimension. Sofia wants to avoid criticism for the potentially antagonistic nature of the strategy, particularly in relation to Chinese interests in the region. That said, Sofia would welcome an all-encompassing approach to security, including humanitarian assistance and disaster-support capabilities if the strategy covered maritime security. Should this be the case, marine sustainability in areas such as the management of fisheries would be of marginal importance to Bulgaria – which would be unlikely to initiate its own plans on the issue but might support those of the EU.

Economic development

Bulgarians are actively discussing ways to improve domestic connectivity infrastructure, not in relation to the Indo-Pacific, but in an effort to boost economic activity in the Balkans. They have a significant interest in energy infrastructure diversification, as well as the digital connectivity agenda in light of Bulgaria's membership of the Clean Network Initiative and 5G rollout. Sofia views connectivity primarily in terms of commerce and, accordingly, the EU's Indo-Pacific strategy as a key element of market access and development policy. Bulgaria still lacks a discussion of the implementation of multilateral standards for quality infrastructure investments which would need to be based on the mobilisation of a combination of sources, including bilateral funding with relevant countries in the region, involvement of the European Investment Bank, and multilateral donors. Bulgaria's priorities for the EU include transport, digital infrastructure, data governance, cyber security, and 5G partnerships. The country hopes to boost the EU's economic and security interests in the Indo-Pacific while offering needs-based development opportunities to countries in region – in line with the bloc's traditional emphasis on economic rather than military power. Sofia has closely followed the European debate on the need for diversification and reshoring, hoping to attract foreign

direct investment. In this, Bulgaria would not be keen on a regional free-trade agreement – especially one that adopted a broad definition of the Indo-Pacific.

Croatia

View of the Indo-Pacific

In Croatia, the domestic conversation about the Indo-Pacific is led by the Ministry of Foreign Affairs, but the agenda for a joint European approach to the region is not currently regarded as particularly important. On the question of a geographic definition of Indo-Pacific, Croatia aligns with the Council's formulation, which sees the Indo-Pacific as stretching from the east coast of Africa to the Pacific islands. Zagreb maintains that the criteria that the EU should use to construct an operational definition of the Indo-Pacific should be EU economic interests as well as economic coercion by systemic rivals.

EU Indo-Pacific strategy

Zagreb understands the Indo-Pacific strategy as both an opportunity for Europe and an anti-China strategic tool; and it sees in the strategy an alignment with the United States. As a result, in establishing regional partnerships, Croatia would give priority to pursuing relations with traditional partners such as the US, the United Kingdom, Australia, and Japan. As one of the largest, and most populous and influential, countries in the world, as well as Beijing's rival in the region, cooperation with India would also be welcome. Further partners to be considered would be the Association of Southeast Asian Nations (ASEAN), Indonesia, the Pacific islands, and Vietnam.

European security

Croatia supports the strengthening of the EU's defence and security cooperation, including in the Indo-Pacific, where it believes the EU should invest in the domains of cyber security, counterterrorism, crisis management and conflict mediation. Should the strategy entail a maritime security component, then Zagreb would be willing to support it through the enhancement of humanitarian assistance and disaster-relief capabilities. Croatia maintains that all future strategic planning should include a sustainability component, but, as of yet, it lacks a discussion about how to achieve it, as well as with regards to the management of fisheries, which Zagreb would be happy to support by advocating for the adoption and maintenance of rules and norms via diplomatic channels.

Economic development

Conversation about connectivity remains relevant domestically, as Croatia is currently working to

address its own internal issues on connectivity infrastructure, but no major discussion is taking place regarding the Indo-Pacific region per se. Moreover, while limited, discussion about the implementation of multilateral standards is concerned with the Three Seas Initiative, with the strategy being largely understood as a key to market access and part of a development policy. In 2019, Croatia's prime minister, Andrej Plenkovic, said: "Better connectivity implies a more secure and high-quality data infrastructure, through the establishment of a functional digital single market and the reduction of the digital divide between better and less developed regions, and the creation of conditions for a secure transition to 5G networks." As concerns where funding should come from, Croatia is yet to define a position. However, it maintains that the criterion for prioritising should be based on the EU's economic interests. The covid-19 pandemic and the Suez Canal Ever Given incident have sparked a discussion about the reshoring and diversification of supply chains, which are yet to be given final direction in policymaking terms. That being said, Croatia would support the establishment of new bilateral free-trade agreements in the region and would likely also support the ratification of the Comprehensive Agreement on Investment with China. In this effort, Croatia would consider Australia and New Zealand as key partners in the region on the grounds of existing diaspora links.

Cyprus

View of the Indo-Pacific

In Cyprus, discussions about the Indo-Pacific are led by the Ministry of Foreign Affairs, which sees the possibility of an EU approach to the region as moderately relevant for its defence and foreign policy goals. The country understands the Indo-Pacific as a geographic entity ranging from the east coast of Africa to the west coast of the Americas. In terms of operationalising the strategy, EU economic interests, regional threats to EU strategic interests, and environmental considerations are all variables that Nicosia would like to see considered.

EU Indo-Pacific strategy

Cyprus sees the Indo-Pacific as a field of opportunity for Europe. As such, the adoption of a joint EU strategy would be understood as an assertion of European strategic autonomy. Because Cyprus views the democratic character of potential partners as very important, it maintains that Europe's main partners in the region should be Japan, South Korea, and Australia. The Association of Southeast Asian Nations (ASEAN) and the Asia Europe Meeting (ASEM) should also be involved.

European security

As a country in the eastern Mediterranean with close proximity to conflict areas, Cyprus pays close

attention to the security dimension of EU foreign policy. As an extension of this position, Nicosia would embrace a security-orientated EU strategy in the domains of maritime and cyber, counterterrorism, crisis management and conflict mediation. It would support these by contributing to freedom of navigation operations, enhancing humanitarian assistance and disaster-relief capabilities, and funding EU programmes. Being so closely reliant on maritime activities for its economic resilience, Cyprus regards marine sustainability as a priority, and attributes some importance to the management of fisheries: it is already a member of the General Fisheries Commission for the Mediterranean and would gladly support similar formats in the Indo-Pacific.

Economic development

Discussion about connectivity is currently at rudimentary level, and it has looked mainly inward as Cyprus hopes to be able to benefit from the forthcoming EU strategy in terms of creating and improving connectivity infrastructure for 5G that would attract more investment. Moreover, there is discussion about implementing multilateral standards for quality infrastructure investment, not limited only to the G20 Principles on Quality Infrastructure Investment, but willing to explore different opportunities to attract quality infrastructure investment. Cyprus sees improved connectivity as an opportunity to attract further investment to the country; in this sense, it regards this as crucial part of development policy. As concerns the financing of infrastructure under the rubric of a future EU Indo-Pacific strategy, Cyprus would encourage the mobilisation of capital from international donors rather than rely on EU funding alone. In this sense, Cyprus maintains that the driving force behind an EU connectivity agenda should be economic interest, with the establishment of digital infrastructure as the main priority. Discussion of deglobalisation has largely been fomented by ELAM, a Eurosceptic party critical of EU immigration policies, but the debate does not touch on the issue of economic interdependencies with other countries. The debate about the need for diversification and reshoring of supply is still at an embryonic stage, and is mainly concerned with meeting the Sustainable Development Goals to provide more opportunities to developing nations. Cyprus would support the establishment of individual bilateral free-trade agreements, including one with China. The partners that Cyprus would wish to see include are primarily the Association of Southeast Asian Nations (ASEAN), the United States, and China. Lastly, in the digital domain, Cyprus would primarily prioritise research and development cooperation, considerations on the future of work and labour, and cyber security.

Czech Republic

View of the Indo-Pacific

In the Czech Republic, discussion of the Indo-Pacific is led by the Ministry of Foreign Affairs, which regards an EU approach to the region as imperative for its foreign policy and defence goals. For Prague, the geographic delimitation of the Indo-Pacific ranges from the east coast of Africa to the west coast of the Americas while the strategy itself should be operationalised through an all-encompassing package. The criteria for deciding how to assemble this package should include EU economic interests and regional threats to EU strategic interests, economic coercion from systemic rivals, and climate change and environmental considerations, but also sustainable development, human rights, ‘soft’ security (non-military security threats), and connectivity.

EU Indo-Pacific strategy

Prague understands the Indo-Pacific as both a field of opportunity for Europe and a vehicle for dealing with China. As such, the EU Indo-Pacific strategy would represent an assertion of strategic autonomy. Key partners in the region would be the following (in order of importance): India, the United States, South Korea, and Japan. The Association of Southeast Asian Nations (ASEAN), Canada, and New Zealand are other actors that could be key partners in the region. China, on the other hand, is not seen as a like-minded partner, but rather a player that – in certain domains – should be monitored further.

European security

Prague would be pleased to have a security component adopted as part of the strategy, and it would see this as complementary to more traditional EU priorities such as trade and sustainability. Aside from maritime security, counterterrorism, and crisis management and conflict mediation, the Czech Republic would encourage investment in cyber and 5G network security, and tackling hybrid threats including disinformation, to work in cooperation with like-minded organisations such as NATO. As concerns the maritime security pillar of the strategy, Prague would be ready to provide its support through the recalibration of arms exports, the enhancement of humanitarian assistance, and disaster-relief capabilities. In the maritime domain, the Czech Republic would prioritise activities focused on maritime sustainability, particularly in the framework of compliance with international law, the ensuring of security and trade routes including the suppression of piracy, and the monitoring of China’s activities. In this sense, fisheries management would not play a central role in Prague’s

priorities for the region.

Economic development

There is no real discussion about connectivity infrastructure for the moment, although the Ministry of Foreign Affairs is planning on starting up this discussion within the year. So far, connectivity has featured in discourse only through ad-hoc consultations with both the ministries of trade and transport, in the framework of connectivity partnerships with Japan and India. Consequently, there is no real discussion about the implementation of multilateral standards for quality infrastructure investment, but it is likely that Prague would follow the G20 Principles on Quality Infrastructure Investment. Connectivity is understood primarily by Prague not much as a tool for coercion, but rather as an instrument of influence. Other aspects of connectivity, in order of ranking, are connectivity as part of a development policy and a key to market access. Other potential areas of cooperation through the framework of connectivity would be concerned with aspects such as energy, transport, digital, and research and development; moreover, Prague would also seek cooperation in space-related activities, which is particularly relevant as the EU Agency for the Space Programme is based in Prague. On how to source capital to fund parts of the strategy's activities, Prague would regard the mobilisation of a combination of sources of capital as the best option, including the use of private funds. All in all, the ultimate aim of connectivity projects should be driven by economic interest. Prague supports a liberal approach towards trade policy, which encompasses increased efforts for a further diversification of trade flows, which the government sees as a valuable tool to secure opportunities for Czech companies, jobs, and the economic growth. The government has mixed feelings towards the reshoring of supply chains: on the one hand, it fears that it might move low added value production to cheaper countries; on the other, in light of the covid-19 crisis, it is aware of the liability of supply chains.

Prague would be in favour of negotiating bilateral free-trade agreements (FTAs) in the region rather than an all-encompassing one, which would be difficult to conclude. On China, the government would first want to see the implementation of the Comprehensive Agreement on Investment, which is equipped with a component on the protection of investment. Viable partners for FTAs consideration could be South Korea, Taiwan, and Vietnam, while in general key partners in the region would be Japan, Australia, and New Zealand.

In the technological sphere, the Czech Republic would prioritise cyber security, data governance, and 5G partnerships. Moreover, it would like to see the implementation of human rights included in the context of technology (such as personal data protection), cross-border data flows, and open trade.

Denmark

View of the Indo-Pacific

Discussion of the Indo-Pacific is led by the Ministry of Foreign Affairs, which regards the region as crucial for its defence and foreign policy goals. Denmark's geographic understanding of the Indo-Pacific defines the region as stretching from the east coast of Africa to the islands of the Pacific. The government maintains that the future strategy should be driven by EU economic interests and EU strategic interests.

EU Indo-Pacific strategy

Denmark understands the Indo-Pacific as a field of opportunity in which the implementation of an EU strategy would create an opportunity for assertiveness as well as a way to support the transatlantic alliance. In this endeavour, Denmark would like to see the establishment of partnerships with relevant players in the field, such as the Association of Southeast Asian Nations (ASEAN), India, Japan, Indonesia, and Singapore.

European security

The security dimension of the Indo-Pacific strategy would be important for Denmark – particularly in the domain of maritime security, cyber security, and counterterrorism; but it is not a priority. It is too soon for Copenhagen to establish how it could contribute to the maritime security aspect of the strategy, because of the existence of the Danish national opt-out, which prevents Copenhagen from participating in all EU Common Security and Defence Policy activities that have defence implications. Neither marine sustainability activities nor fishery management in the Indo-Pacific are particularly important for Denmark.

Economic development

While there is no wider discussion about connectivity in the Danish public debate, the issue has become increasingly important for the Danish government, especially in international-focused ministries. Moreover, a discussion is taking place about the need to implement multilateral standards to ensure the quality of infrastructure investments. The government believes this should be driven by the G20 Principles on Quality Infrastructure Investment, especially in the context of ensuring that relevant players, such as China, uphold them. Some degree of government funding has already been allocated specifically to deal with connectivity, but Denmark maintains that connectivity projects in the Indo-Pacific region can only be successful if they are based on a broad range of financing. As

concerns the connectivity priorities that the EU should pursue in the region, Denmark would prioritise digital infrastructure as the most pressing deliverable, followed by energy and climate change, and transport infrastructure. Ultimately, the main drivers for determining the priority of connectivity projects should be strategic interests and geopolitical considerations. Discussions about the diversification and reshoring of supply chains are taking place in Denmark, and are concerned mainly with digital infrastructure. More broadly, questions about deglobalisation in the country are driven by regionalisation as a potential solution to address some of the weaknesses of globalisation. Denmark is very supportive of bilateral free-trade agreements, and would be happy for the EU to conclude one even with China. Although unrealistic, Denmark would support the extension of such an agreement to the broader region. In establishing cooperation with regional players, Denmark would prioritise partnerships with Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) countries India and Indonesia, and would consider Singapore to be particularly important. Concerning the tech dimension, Copenhagen would prioritise the establishment of projects concerning research and development, the responsible use of AI, and cyber security.

Estonia

View of the Indo-Pacific

Formally, the Estonian Ministry of Foreign Affairs is responsible for the development of ties in the Indo-Pacific, but the role of the ministry has been modest in the promotion of discussion concerning the region in public debate. Estonia maintains that the criterion on which to base the activities of the new Indo-Pacific strategy – understood as spanning from the east coast of Africa to the west coast of the Americas – should be the European Union’s economic interest.

EU Indo-Pacific strategy

Estonia understands the Indo-Pacific as geographic region that could translate into a field of opportunity for Europe, while it sees the strategy itself as a way of managing the transatlantic alliance. For Tallinn, the democratic character of potential partners is highly relevant, and is reflected by its choice of preferred partners in the region: the United States and India.

European security

Estonia considers the security component of the Indo-Pacific strategy to be of primary importance, and it maintains that there should be more unity among allies, both within the EU and across the Atlantic. In particular, Estonia would regard it as imperative for the EU and US Indo-Pacific strategies to be complementary, to ensure the two do not work against each other in the region. The domains in

which Tallinn would like to see more EU investment are maritime, cyber, and environmental security. Against this backdrop, should the forthcoming Indo-Pacific strategy encompass a maritime security component, Estonia would be willing to support it through contributing to freedom of navigation operations, the enhancement of humanitarian assistance and disaster-relief capabilities, and funding EU programmes. As a coastal country, it would regard the sustainability of maritime activities as relatively important. It would not be particularly concerned with the question of the sustainable management of fisheries in the Indo-Pacific.

Economic development

Discussion about connectivity in Estonia is almost non-existent – both at government and media level, and is largely relegated to the escalating competition dynamic between China and the US. In this sense, discussions about connectivity are mainly concerned with the goal of supporting Washington's interests vis-à-vis Beijing. In descending order, Estonia understands connectivity as: a threat to EU interests; part of a development policy; an instrument of influence; and a key to market access. Because discussion about connectivity is still at rudimentary level, there has not yet been an occasion for the government to express a preference for where capital should come from. What is clear is that the criterion to follow for the prioritisation of capital should be that of countering China. Regarding domestic debates about the need for diversification and reshoring, discussions are taking place about the potential risks associated with economic instability – such as the covid-19 pandemic – and exclusive suppliers. That being said, Estonia would welcome the establishment of an all-encompassing free-trade agreement in the Indo-Pacific, as a vehicle to strengthen the EU's position in the region. In this effort, Tallinn would be happy to strengthen ties with India and Indonesia, which are part of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), as well as Australia. Social standards for future trade agreements and regulations on subsidies and on state-owned enterprises are not seen as particularly relevant, while environmental and climate standards, the protection of intellectual property, and the establishment of a competition policy are seen as desirable.

As concerns the technological sphere, priority is given to research and development cooperation, responsible use of AI, and cyber security.

Finland

View of the Indo-Pacific

In Finland, the Ministry of Foreign Affairs leads discussion about the Indo-Pacific, and the goal of an EU approach to the region is seen as highly relevant for the success of the country's foreign and

defence policy. Geographically, Helsinki defines the Indo-Pacific as a region spanning from the east coast of Africa to the Pacific island states, covering the Indian Ocean and the western part of the Pacific. The criteria on which the operational definition of the Indo-Pacific should rest are EU economic interests and regional threats to those interests.

EU Indo-Pacific strategy

While the Indo-Pacific per se is understood as a field of opportunity for Europe, the adoption of an EU Indo-Pacific strategy would be interpreted by Finland as an assertion of European strategic autonomy. Helsinki places great importance on the democratic character of potential partner countries. This is reflected in its expressed preference for partners in the region: the United Kingdom, the United States, and India. The Association of Southeast Asian Nations (ASEAN) would also be a welcome ally for the EU.

European security

For Finland, the adoption of a security dimension in the Indo-Pacific strategy would be regarded as relatively important, both for engagement with the region per se – where it would like to see a deepening of EU investment in cyber security and crisis management and conflict mediation – as well as an exercise to deepen defence cooperation among EU member states. If the EU were to include a maritime security pillar as part of the defence dimension of the Indo-Pacific strategy, Helsinki would provide support through the enhancement of humanitarian assistance and disaster-relief capabilities, funding bilateral cooperation programmes, and funding EU programmes. The promotion of sustainable maritime activities would be only somewhat relevant but would complement the country's own foreign policy of promoting sustainable development, while the management of fisheries would not be considered a priority.

Economic development

Finland is experiencing a relatively lively debate about connectivity, which is translating into initial steps towards establishing concrete projects. In general, these debates usually culminate in viewing Chinese investments and China's Belt and Road Initiative as a threat. There is a discussion about implementing multilateral standards for quality infrastructure investments, and an underlying suspicion of China's engagement with the country. In general, Finland sees connectivity as a key to market access and as part of a development policy. But it underscores the need for the EU to find a unified consensus on connectivity, so that it can be truly integrated. That being said, funding for connectivity would need to be mobilised from a variety of sources, so as to be able to build digital infrastructure and transport infrastructure, and to support activities on energy and climate change,

and on people-to-people exchange. Finland maintains that the main driver behind connectivity infrastructure projects should be that of pursuing EU economic interests.

There are domestic discussions about the question of deglobalisation but there is general consensus that, for a small export-orientated country such as Finland, globalisation has been highly beneficial. Following the covid-19 pandemic, however, internal debate has gained new traction about the need for Finland to improve its domestic security of supply, and back-up systems and alternative sources of supply and delivery routes. While Finland would be theoretically open to an all-encompassing agreement in the region, it recognises that the establishment of bilateral free-trade agreements would be more feasible. The prospect of an agreement with China would not be disregarded, but Beijing would have to comply with the rules that bind others. Key partners in the region that the EU should consider are the Association of Southeast Asian Nations (ASEAN), India, Indonesia, and Australia. As concerns the tech sphere, Finland would prioritise projects concerned with cyber security, 5G partnerships, and the responsible use of artificial intelligence. Other aspects that the EU might want to consider priorities are the European Green Deal and the circular economy.

France

View of the Indo-Pacific

Discussion in France about the Indo-Pacific was first initiated by the Ministry of Armed Forces, which in 2018 launched the first Indo-Pacific Strategy in Europe. Now discussion is being driven by the president's office and the Ministry of Foreign Affairs, along with the Ministry of Armed Forces and the General Secretariat for Defence and National Security. As the only European country that has overseas territories in the Indo-Pacific, France considers itself a "resident power" in the region. As such, the Indo-Pacific is already an integral element in French defence and foreign policy goals. An EU approach to the region is, therefore, seen as "somewhat important" by Paris. France's geographical definition of the Indo-Pacific spans from the east coast of Africa to the west coast of the Americas. It holds that regional policy should include the pursuit of EU economic interests, defence against regional threats to EU interests, and coercion by systemic rivals, while keeping an eye on environmental considerations.

EU Indo-Pacific strategy

As it sees itself as an Indo-Pacific nation, France considers the forthcoming EU Indo-Pacific strategy as a tool to assist its own national interests as well as a vehicle through which to control China's increasing influence. French policymakers would favour a strategy that aims to assert EU strategic autonomy and reinforce the transatlantic alliance. Against this backdrop, a steady partnership with

Australia and India would constitute an essential pillar of engagement for France. It also considers the United Kingdom and the United States indispensable allies in the region, but how they would work more closely together is yet to be clearly defined. France would also welcome greater cooperation with Indonesia and the Association of Southeast Asian Nations (ASEAN).

European security

Security issues constitute a key aspect of the French national Indo-Pacific strategy. As such, Paris hopes that the EU's new strategy will complement its national efforts, but it is also aware of the fact that EU engagement is unlikely to bring much added value in the security realm. Nevertheless, it would welcome further investment by the EU in maritime, cyber, and environmental security, as well as counterterrorism. Should the EU Indo-Pacific strategy include a maritime security dimension, then France would be happy to support it by contributing to freedom of navigation operations, enhancing humanitarian assistance and disaster-relief capabilities, and funding bilateral and EU cooperation programmes. The issue of marine sustainability – including fisheries – is fairly important to France, especially with regard to French exclusive economic zones in the region. In light of this, Paris would encourage engagement from the Indian Ocean Rim Association.

Economic development

The concept of connectivity is yet to become well established in France; its policy definition still largely focuses on individual terms such as “infrastructure” or “transport”. As a result, in France connectivity is understood as a loosely defined term encompassing all of the above, but which is yet to be taken up by a centralised policy agency. In the particular Indo-Pacific context, senior officials in France largely interpret the notion of connectivity as a response to China's Belt and Road Initiative. Through work on connectivity, France would pursue the protection of sea lines of communication and would support all efforts to preserve a free maritime space for trade. While there is no established set of priorities in France – different ministries prioritise different agendas in the region – energy, climate, and digital security are likely to be priorities in the long term, while short-term goals will include the bringing forward of infrastructure projects.

For the financing of connectivity projects, France would prioritise European instruments such as the NDICI (Neighbourhood, Development, and International Cooperation Instrument), the European Development Fund, and the European Investment Bank.

In recent years, but particularly following the covid-19 pandemic, domestic discussion about the need to reshore supply chains has gained traction among all political parties, which hope to increase the resilience of certain sectors of the economy, including the aeronautical, pharmaceutical, and chemical

sectors. That being said, Paris would be open to negotiating bilateral free-trade agreements in the region but would not welcome the conclusion of such an agreement with Beijing. Instead, it would like to see further cooperation with well-established partners such as Japan and Australia, but also the Association of Southeast Asian Nations (ASEAN) and Indonesia. As concerns priorities for the tech domain, France believes that, in the context of the Indo-Pacific, the EU should strive to excel in all domains, from the future of labour and 5G partnerships to the responsible use of AI. Future research and development activity should include innovation, data governance, and cyber security.

Germany

View of the Indo-Pacific

In Germany, the Ministry of Foreign Affairs leads the debate on the Indo-Pacific, which it understands as a question that goes beyond mere geographical terms. Berlin's definition of the Indo-Pacific encompasses everything covered by the Indian and Pacific Ocean. For Germany, an EU approach to the region is vital in order to uphold EU economic interests and fend off regional threats to EU strategic interests and economic coercion, but also to discuss climate change and further environmental considerations.

EU Indo-Pacific strategy

From a geostrategic perspective, Germany sees the forthcoming EU strategy as an opportunity for the EU, and as a way to manage the rise of China rather than as a containment measure. This was underscored by Berlin's decision to call its domestic vision for the Indo-Pacific "guidelines" rather than a "strategy". Against this backdrop, Germany's vision for the Indo-Pacific is one that would aim to oppose Chinese hegemony, but without taking sides in the competition between the United States and China. Based on these considerations, Germany would like to see the European Union strengthen ties with Japan, India, and the United Kingdom, and would welcome the deepening of partnerships with New Zealand and the Association of Southeast Asian Nations (ASEAN).

European security

Germany regards security considerations in the Indo-Pacific as important, especially against the backdrop of tensions in the South China Sea and the Taiwan Strait, which could undermine the overall stability of the region. That being said, Germany would welcome EU security engagement that is more orientated to non-traditional security issues: it believes that the regulatory power of the EU should be employed to promote good governance, climate policy, and a rules-based order in the region. Sustainable maritime activities would also be welcome in an effort to promote conscious

climate action, although it is not Germany's prime interest.

Economic development

While broadening the scope of its political engagement across the region is a matter of new emphasis, Germany's Indo-Pacific approach still focuses on trade, investment, and economic security. Berlin's hope is that strong trade relations with several partners in the region may also support their sovereignty against Beijing's political influence as exerted through its Belt and Road Initiative. In this regard, there is a lively internal discussion in Germany on connectivity, particularly with regard to sustainable mobility. Connectivity is seen as the key to successfully competing internationally. In this context, Berlin believes it is important to enable fair competition, to avoid over-indebtedness on the part of recipient countries, and to ensure sustainability and transparency of the projects. It therefore believes that funding for connectivity projects in the Indo-Pacific region should be mobilised from various sources, namely from international financial institutions, multilateral development banks, the private sector, and the European Investment Bank. Berlin sees connectivity as a platform for increasing people-to-people exchanges and enhancing transport infrastructure, whose standards it holds should be agreed on multilaterally, including through the G20 Principles on Quality Infrastructure Investment. While it believes that economic interests should predominate when the EU is deciding which connectivity infrastructure projects to prioritise, Berlin would also like to see a rebalancing of the EU's relationship with China in the interest of reducing the former's dependency on the latter.

Germany would welcome economic diversification in an effort to reduce European vulnerabilities and pursue a more autonomous foreign policy. It would therefore welcome new bilateral free-trade agreements throughout the region to reduce its current dependencies on China. It would therefore be happy to deepen bilateral ties with countries in the region, particularly in Oceania. Data governance, 5G partnerships, and cyber security are German priorities for the tech domain, along with green technologies for industry 4.0, such as electric vehicles, storage technologies, and chip manufacturing.

Greece

View of the Indo-Pacific

The Greek Ministry of Foreign Affairs holds the reins of discussion about the Indo-Pacific, which it defines as a geographic entity between the east coast of Africa and the west coast of the Americas. The prospect of an EU approach to the Indo-Pacific does not rank particularly high on Athens's agenda for foreign and defence policy. The criteria that should be employed for an operational definition of the strategy should include the European Union's economic interest, regional threats to EU strategic

interests, and climate change and environmental considerations.

EU Indo-Pacific strategy

Greece understands the Indo-Pacific region as a field of opportunity for Europe, in which a unified strategy should aim to enhance EU strategic autonomy, take the United States into account, and seek to maintain good relations with China. As concerns which particular partnerships to pursue, Athens would seek deeper cooperation with Washington and New Delhi, but would not exclude Beijing either.

European security

The security dimension of the Indo-Pacific strategy would be regarded as marginally important, as Greek interest remains limited in being involved in military security matters in such a distant and vast region. Greece would support EU policies in the Indo-Pacific as a matter of principle but would prefer engagement to focus on economic cooperation, environmental sustainability-orientated efforts, and counterterrorism. Should the EU Indo-Pacific strategy contain a maritime security section, Athens would support it by enhancing humanitarian assistance and disaster-relief capabilities. While the country recognises the value of supporting marine sustainability activities in the region, it maintains that this should not distract from pursuing similar goals in the Mediterranean. Similarly, the protection of sustainable management of fisheries is of marginal interest, at least for now as Athens's potential commitment to this area remains theoretical.

Economic development

Discussion in Greece concerning connectivity is minimal. The term “connectivity” features twice in Athens's national growth plan, but is mainly relegated to the role of ports. There is still no discussion of the implementation of multilateral standards for quality infrastructure investment. Greece understands connectivity as part of a development policy, a key to market access, and an instrument of European influence. Its interest in the initiative is driven largely by economic considerations, in the hope that investment under the initiative will boost trade and contribute to the recovery of the Greek economy. On the subject of assistance, financing, and guarantee tools to deploy in support of the strategy, Greece has yet to make a clear statement, but it would theoretically support the EU-Asia connectivity strategy model. Regarding the mobilisation of funding, the government would support a combination of funders, and would pursue a strategy inclusive of China, especially as Greece is a member of the Asian Infrastructure Investment Bank, albeit with only a low capital contribution. For Athens, the priorities for the region relate to energy and climate change, reflecting the domestic agenda and the interest of Greek energy companies in the region. Transport is also salient because of the important role of the Greek shipping industry in global trade. Athens would be supportive of more

bilateral free-trade agreements (FTA), and would be open to establishing a multilateral FTA, so long as Beijing is included. The country would also be interested in engaging with Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) countries India and Australia, but is open to conversation with all actors in the region. As concerns the tech dimension, a tentative ranking of priorities would be: research and development cooperation; the future of labour; and innovation and commercialisation. In general, in its considerations towards the Indo-Pacific, Greece maintains that the EU should prioritise issues in its own neighbourhood – namely the Mediterranean, where its relationship with Turkey dominates Greece’s foreign policy.

Hungary

View of the Indo-Pacific

In Hungary, the Ministry of Foreign Affairs is leading what discussion there is of the Indo-Pacific. The ministry does not see a unified European approach to the region as of relevance for its foreign and defence policy. It would define the Indo-Pacific as spanning from India to south-east Asia and would include the Korean peninsula and Japan. For Hungary, the strategy in action should concentrate on the pursuit of EU economic interests.

EU Indo-Pacific strategy

The Indo-Pacific is seen by Budapest as a region of opportunity for Europe. Hungary would prefer for the strategy, when implemented, not to be bound by geostrategic considerations, but rather to be driven by the goal of supporting regional stability, and to focus on trade, economic cooperation, and development. The establishment of partner countries in the region would depend on the role that the Indo-Pacific strategy would come to adopt. Ultimately, though, Hungary is wary of the strategy undermining China’s interests in any way.

European security

Hungary would prefer the EU Indo-Pacific strategy to have no security dimension at all. The country has no interest, and in fact is opposed to, any move that could negatively impact on its relationship with China. It therefore holds that security issues that may be conflictual, especially those that could entail provoking China, should not feature in the strategy. Because Budapest maintains that the strategy should be mainly orientated to the pursuit of economic interest, a security component would be acceptable only so long as it supports economic interests such as anti-piracy activities in the Indian Ocean. Therefore, in the drafting of a maritime security component, Hungary would like to see more investment in the securing of maritime routes and in promoting the role of the EU as a mediator in

conflict resolution.

Economic development

Discussions about connectivity in the Indo-Pacific are taking place in Hungary, and they focus on the role of the forthcoming strategy as a facilitator of market access and a tool for economic cooperation and development. In this regard, Hungary would like the EU to prioritise transport infrastructure, namely road and railways, as well as energy connectivity and developing Hungary's energy interconnectedness through connections with neighbouring countries, reverse flow, new pipelines, and new sources. There is still no discussion – at least not on record – about the assistance, financing, and guarantee tools that Europeans could deploy to support connectivity projects. But Hungary would likely support the mobilisation of capital from a combination of sources. The need for investment in the region is so vast that it would be important to engage multiple donors and have multilateral financing with the involvement of development banks, regional countries in the area, and potentially private sources. Given this, Hungary does not believe that China should be excluded from contributing financially to projects; Budapest believes it may help regional actors adapt to international standards. The question of deglobalisation is not discussed at government level nor by the public at large, but it is gaining ground within academia. As a result, Hungary would happily support the establishment of bilateral trade agreements as well as an all-encompassing regional one, particularly with Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) countries Japan, South Korea, and Indonesia. As concerns priorities in the technology realm, Hungary believes that innovation and commercialisation, cyber security, and the future of labour to be the most relevant work streams.

Ireland

View of the Indo-Pacific

In Ireland, discussion of the Indo-Pacific is led by the Ministry of Foreign Affairs, which sees the goal of an EU approach to the region as important to achieving its own foreign policy and defence goals. In geographic terms, Ireland would define the Indo-Pacific as running from Pakistan to the islands of the Pacific. In terms of key priorities for the Indo-Pacific, Ireland would point to the pursuit of EU economic interests and climate change and environmental considerations.

EU Indo-Pacific strategy

Dublin understands the Indo-Pacific region as a field of opportunity for Europe, where the adoption of a unified strategy would represent an assertion of European strategic autonomy. Ireland would

pursue partnerships with the United States, China, and India primarily, viewing each as equally important actors in terms of regional relevance and balancing out divergent interests Ireland has recently deepened its engagement with New Zealand, and regards the country as another like-minded actor that could help establish partnership working in the Indo-Pacific, especially in view of the fact that Dublin considers the democratic character of potential partnerships to be important.

European security

Ireland is not motivated by security considerations as it assesses its engagement with the region, instead preferring to focus on trade and development. That said, depending on the methods used, Dublin would be interested in peacekeeping operations, enhancing humanitarian assistance, and disaster-relief capabilities. It would support the European Union directing more investment towards strengthening cyber security, environmental security, and crisis management and conflict mediation. Neither marine sustainability activities nor the sustainable management of fisheries figure highly as priorities.

Economic development

As an island nation, connectivity issues have long formed part of the Irish foreign policy debate. Dublin is most interested in: digital connectivity and the service economy, including financial services; increasing the number of direct air routes to the Indo-Pacific; and increasing its agricultural trade with Asia. Ireland typically sees its IT and communications networks combined, with both its high-volume air and sea connectivity making it a potential hub for global markets more broadly. Ireland's internal strategy for the Indo-Pacific is complementary to the work done centrally in Brussels and is designed to allow for cooperation within multilateral forums. In general, Ireland would welcome multilateral engagement of through the EU, the Asian Development Bank, and the Asian Infrastructure Investment Bank. Moreover, its view of the EU Indo-Pacific strategy is based on a commitment to explore new partnerships in the future to support programme implementation, and to realise commercial opportunities for Ireland. All in all, Ireland believes that economic interest should drive EU engagement with the region. As a global hub for multinational investment, Ireland has a significant interest in maintaining – and deepening – global links, including to the Indo-Pacific. Discussion of diversification and reshoring has arisen because of Brexit, given how integrated Ireland and the United Kingdom are with each other. With respect to the implementation of trade agreements, Ireland favours a flexible engagement with the region, which would include bilateral agreements, where necessary, and agreements with blocs of countries, where preferable and feasible. A single free-trade agreement for the Indo-Pacific region is not seen as the most pragmatic approach, given the diversity of the actors and the wide variety of interests in play. Ireland agrees that China is

both a rival and a partner, and does not consider it prudent to exclude Beijing from consideration for future trade deals, though a bilateral deal seems the more reasonable approach, considering China's size, uniqueness, and economic importance. The EU should encourage partnerships with Australia, New Zealand, and Japan. In the realm of technology, the EU should prioritise research and development, data governance, and the responsible use of AI.

Italy

View of the Indo-Pacific

In Italy, discussion of the Indo-Pacific is led by the Ministry of Foreign Affairs, which regards a unified EU approach to the region as highly relevant for its foreign and defence policy. From a geographic perspective, Italy considers the Indo-Pacific as covering the area from the east coast of Africa to the islands of the Pacific. In substantive terms, Rome considers the Indo-Pacific a region relevant for the European Union's economic interests, regional threats to EU strategic interests, and climate change and environmental considerations.

EU Indo-Pacific strategy

If the Italian view is that the Indo-Pacific in its geographic sense is a field of opportunity for Europe, the adoption of a unified strategy on the region would signify for Italy an assertion of European strategic autonomy. In the establishment of partnerships with regional actors, Italy would prioritise engagement with the "Quad" partners of India, Australia, Japan and the United States. The Italian stance on China remains nuanced, and Italy may have some difficulty reconciling its position should the new EU Indo-Pacific strategy strike a different pose. If the overriding emphasis of the strategy is the pursuit of EU economic interests, then – according to Italian officials – China, as an important commercial and economic partner, ought to be included in the conversation. The Association of Southeast Asian Nations (ASEAN) and the Indian Ocean Rim Association (IORA) should also be included.

European security

For the time being, the Indo-Pacific strategy should concentrate on building a constructive relationship with partners in the region by focusing on commercial activities. In the future, the security dimension might become more relevant, but at the moment Rome considers the issue peripheral. Aside from maritime, cyber, and environmental security, this dimension should include counterterrorism and crisis management and have regard also to anti-piracy capacity. If the strategy were to encompass maritime security, Italy would support it by contributing to freedom of navigation

operations, enhancing humanitarian assistance and disaster-relief capabilities, funding bilateral cooperation programmes, and funding EU programmes. Italy places high priority on issues concerning marine sustainability activities and on sustainable management of fisheries.

Economic development

Several connectivity conversations are taking place in Italy, with a strong emphasis on port infrastructure and undersea cables in particular. Other aspects of the discussion are concerned with improving energy connectivity in the Mediterranean basin, and with the need to establish free and open 5G networks. The discussion encompasses the need for the implementation of multilateral standards for quality infrastructure investment, which is related to the G20 Principles on Quality Infrastructure Investment, by including environmental considerations targeting sustainability goals, greater use of risk management in infrastructure design, openness and transparency, and well-functioning governance institutions. Italy understands connectivity largely as a key to market access and part of a development policy, with particular emphasis on economic development and energy security. Other aspects of the connectivity conversation centre on the advancement of domestic interests in the Mediterranean through connectivity-related infrastructure. As concerns Italy's preference regarding the choice of assistance, financing, and guarantee tools, Italy attributes importance to its status as an official development partner of ASEAN, and emphasises the link between Italy and IORA vis-à-vis the blue economy. For the mobilisation of capital to be invested in connectivity projects, Rome would favour European and multilateral investment, with economic interest a driving force behind the prioritisation of projects. It would prefer to focus on energy and climate change, transport, and digital infrastructure. Given that Italy's economy is largely reliant on exports, the conversation on deglobalisation is focused on diversification – particularly related to health supply chains and foreign takeovers of national firms. That being said, Italy would be open to establishing new bilateral trade agreements in the Indo-Pacific. Considering the complexity of the China discussion, any proposal to include China would need to be carefully weighed at EU level. All countries in the region would be viable as partners, but Italy would prioritise ASEAN for free-trade agreement negotiations. The technological component of the EU Indo-Pacific strategy should mainly be concerned, in order of ranking, with innovation and commercialisation, data governance, the future of labour and cyber security.

Latvia

View of the Indo-Pacific

In Latvia, the conversation on the Indo-Pacific is led by the Ministry of Foreign Affairs, for which an

EU approach to the region is very important for the country's defence and foreign policy goals. The geographic definition of the Indo-Pacific would stretch from Pakistan to the islands of the Pacific. For Latvia, operationalising the strategy would mean building on the criteria of EU economic interests and consequent regional threats, as well as security and defence matters.

EU Indo-Pacific strategy

Riga regards the Indo-Pacific concept as an anti-China strategic tool, and it views the eventual adoption of a unified strategy on the region as an alignment with US goals. Given this, it believes that Japan, the United States, the United Kingdom, and India would be the most relevant partners for the EU in the region.

European security

For Latvia, the security dimension of Brussels's Indo-Pacific strategy is central, as it sees the strategy largely through the prism of US interests. Latvia maintains that no EU strategy should exist without an alignment with Washington, especially vis-à-vis the security threats posed by China in the Indo-Pacific. Such a security dimension ought not to challenge the existing security structures of NATO, and should be deployed by leading by example through setting rules and standards. If a maritime security pillar were to be included in the strategy, Latvia would support it by enhancing humanitarian assistance and disaster-relief capabilities, as well as by funding bilateral programmes. It would regard marine sustainability activities, understood largely through the framework of freedom of navigation, as highly important. The question of the sustainable management of fisheries is also regarded as a priority by Latvia, which would consider a desirable outcome to be the emulation of the EU's common fisheries policy to international players.

Economic development

Discussion of connectivity in Latvia is taking place and has evolved from an outlook largely focusing on collaboration with countries in Asia, including China, around 2016-17 to one that since 2018 has been largely focused on securitisation. In the context of the covid-19 pandemic, the discussion has shifted further to include the security of supply chains. Latvia understands connectivity largely as a tool to fend off threats to EU interests in the region, as well as a tool to realise EU influence and coercion, especially in the context of market access. A further aspect discussed in the country is how to transform Latvia into a transit hub. Domestically, discussion is non-existent about providing assistance, financing, and guarantee tools to support activity in the Indo-Pacific. Meanwhile, the country would prefer to see the mobilisation of capital come from bilateral funding from the European Investment Bank and multilateral donors, as it would be complicated for Latvia to aggregate financing

for projects in a region many in the country view as distant. Ultimately, though, the main criterion for prioritising connectivity infrastructure is whether it helps counter China. Discussion about the diversification and reshoring of supplies in Latvia is mainly concerned with the need to move production away from China to safer and cheaper countries. In this sense, Riga would prefer the establishment of an all-encompassing free-trade agreement (FTA) with Indo-Pacific partners as opposed to having bilateral agreements with individual countries. However, in an all-compassing FTA the inclusion of China would not be mandatory. The small Pacific islands states, Australia, Indonesia, the US, and Canada would be the key partners for Europe in this effort. As concerns the technological sphere, Latvia would prioritise investment in 5G partnerships, innovation and commercialisation, and data governance.

Lithuania

View of the Indo-Pacific

In Lithuania, debate about the Indo-Pacific is directed by the Ministry of Foreign Affairs, which sees the goal of an EU strategy on the region as somewhat important for its defence and foreign policy goals. Geographically, Lithuania defines the region as starting at the east coast of Africa and ending at the west coast of the Americas. EU economic interest, coercion by systemic rivals, and regional multilateral organisations such as the Association of Southeast Asian Nations (ASEAN) are important factors the EU should take into account when deciding how to make the strategy a reality.

EU Indo-Pacific strategy

Lithuania understands the Indo-Pacific both as a field of opportunity for China and as an anti-China strategic tool. Vilnius largely regards the forthcoming strategy as an alignment with the United States and a way of managing the transatlantic relationship. It sees India, the United States, and South Korea as key partners in the region, mirroring the importance that Lithuania attributes to the democratic character of potential partners. It also considers ASEAN an important actor to engage with.

European security

Lithuania does not have direct security interests in the region. This, coupled with its limited defence budget, means it does not prioritise the security dimension of the future strategy. That being said, should the European Union launch security-orientated missions in the Indo-Pacific, Vilnius would likely participate out of a general commitment to the EU. Lithuania's perception of the relevance of the security dimension in the strategy would be directly proportionate to how involved or uninvolved

the US gets. Against this backdrop, the government would consider as largely important the establishment of a cyber security partnership with the “Quad” countries. Sustainability, including marine sustainability and on fishery management, would be among the most pressing issues to address, in line with the core principles of EU foreign and development policy.

Economic development

Lithuania follows the definition of connectivity as found in the EU strategy on “Connecting Europe and Asia” – that is, as a concept covering transport, energy, digital, and people-to-people connectivity. Transport infrastructure is seen as priority for Lithuania, followed by people-to-people exchanges, namely tourism, and student exchanges. It believes that digital and energy connectivity is integral to all economic growth but will only gain relevance in the future. Lithuania’s approach to the region is centred on the goals of economic diversification and access to new markets. This is, in part, conditioned by the broader geopolitical competition with Beijing, but economic interests predominate.

Perhaps because the government does not yet have a single department focused on connectivity, there is still no live conversation in Lithuania about assistance, financing, and guarantee tools to use to support the future strategy. Similarly, there is no substantial discussion about the most appropriate funding mechanisms for where a mixed approach would likely be prioritised. The issue of deglobalisation is not particularly discussed in the country, while those of diversification and reshoring of supply chains have been accentuated by the covid-19 pandemic: the concentration of production of critical goods abroad – notably in China – is seen as problematic and potentially dangerous. On the other hand, tech companies in particular see the prospect of reshoring as a potential opportunity to attract more investment from western European markets. Lithuania would see the conclusion of an EU-ASEAN bilateral free-trade agreement (FTA) as an aspirational outcome, but acknowledges that the establishment of individual FTAs would likely be more feasible. In this sense, Australia, Japan, New Zealand, and Singapore would be seen as like-minded partners. In tech, Riga would prioritise data governance, 5G partnerships, and the responsible use of AI. It would also emphasise the need to address restrictions on data flows in the Indo-Pacific.

Luxembourg

View of the Indo-Pacific

In Luxembourg, discussion of the Indo-Pacific is led by the Ministry of Foreign Affairs, which sees the potential of a unified strategy as relatively important for its foreign policy and defence goals. Its definition of the region extends from the east coast of Africa to the Pacific Island states, including Oceania. The drivers for the strategy in action would be EU economic interest, regional threats to EU

strategic interests, and climate change and environmental considerations.

EU Indo-Pacific strategy

Luxembourg understands the Indo-Pacific as a field of opportunity for Europe, and sees the strategy as helping foster a coherent approach to the Indian Ocean, shaped around the concept of cooperation with key partners in Africa and Asia. Regarding the establishment of partnerships in the region, it believes that the European Union should choose who it cooperates with on the basis of specific policy areas where partners can find common ground, and based on shared principles and values, or mutual interest. In this sense, although Luxembourg regards the democratic character of potential partners as important, it would establish partnerships with China as well as with Australia and Japan.

European security

As a small state with limited defence capabilities, Luxembourg's interest in the security dimension is minimal, especially considering its geographic distance from the Indo-Pacific region. It would rather concentrate on establishing bilateral relations with individual countries. That being said, Luxembourg would welcome EU investment in maritime, cyber, and environmental security, as well as counterterrorism, and crisis management and conflict mediation. Luxembourg does not – as of yet – have a clear strategy on how it would support a possible maritime security pillar, but it would regard both marine sustainability activities and sustainable management of fisheries as a priority.

Economic development

In the country, discussion about connectivity exists and is mostly centred on services. Connectivity is seen largely through an economic lens: the survey options of “part of a development policy” and a “key to market access” top the ranking, while the geopolitical dimension does not receive much emphasis. Luxembourg would suggest European Investment Bank (EIB) funding as an option for an assistance, financing, and guarantee tool. It would encourage funding to be mobilised by multilateral donors, bilateral funding, and the EIB. The priorities indicated by Luxembourg for connectivity would be digital infrastructure followed by energy and climate change and transport infrastructure. Considerations about the sustainability of these projects should be the main criterion for the selection of the projects. Regarding deglobalisation, in Luxembourg the outbreak of covid-19 led to a strengthening of the debate on European strategic autonomy. Luxembourg holds that, following recent agreements with Japan, South Korea, Singapore, and Vietnam, the EU should seek to conclude similar bilateral agreements with Australia, Indonesia, and New Zealand, and should take further steps towards concluding the Comprehensive Agreement on Investment with China. The EU should also explore and deepen economic relations with India and should in general pursue trade relations

with all partners with shared values, principles, and mutual interests. As concerns the technological component of the Indo-Pacific strategy, data governance, cyber security and responsible use of AI would be the priorities.

Malta

View of the Indo-Pacific

In Malta, the debate about the Indo-Pacific strategy is led by the Ministry of Foreign Affairs, which does not regard the goal of establishing an EU approach to the region as a priority for its own foreign policy and defence goals. Malta maintains that the geographic definition of the region should span from the east coast of Africa to the west coast of the Americas. The eventual strategy should encompass EU economic interests and climate change and environmental considerations.

EU Indo-Pacific strategy

For the island, the Indo-Pacific represents a field of opportunity for Europe, in which an EU strategy would translate into an assertion of European strategic autonomy. The key partners in the region with which the European Union should seek to deepen ties are Japan, Australia, and China. The Association of Southeast Asian Nations (ASEAN) would be welcomed to the conversation as well. The democratic character, or otherwise, of potential partners is not necessarily regarded as a priority.

European security

Malta would not look on the potential security dimension of the Indo-Pacific strategy as a priority, but would encourage the EU to divert capital to maritime and environmental security. Should the EU strategy for the region include a maritime security pillar, Malta would support this by funding bilateral cooperation and EU programmes. It sees marine sustainability as relatively important, while the sustainable management of fisheries would assume a peripheral role.

Economic development

At the present time, in Maltese politics there is no discussion about connectivity or infrastructure development related to the Indo-Pacific, nor is there any debate concerning the implementation of multilateral standards. In general, Malta would prioritise a strategy on the region driven by economic interest and, as such, it would see connectivity as key to market access and as part of a development policy. Digital infrastructure, people-to-people exchange, and transport infrastructure would likely be its main interests, while Malta believes that capital should come from bilateral funding from the European Investment Bank. Despite the heavy impact of the pandemic on Malta, especially given its

limited national supply and heavy reliance on outside supply chains, there is no discernible ongoing debate on deglobalisation or reshoring supply chains. Regarding the negotiation of further free-trade agreements, Malta remains open to different options, so long as Beijing is brought in as a relevant stakeholder. ASEAN, countries that are part of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership, and India would be other potential partners that could help realise EU efforts in the region. As concerns the technological sphere, Malta would identify research and development cooperation, innovation and commercialisation, and the future of labour as the key components for the strategy.

Netherlands

View of the Indo-Pacific

The Dutch conversation on the Indo-Pacific is led by the Ministry of Foreign Affairs, for which the EU Indo-Pacific strategy is set to play a crucial role in its foreign and defence policy goals. The Netherlands defines the Indo-Pacific as a region stretching from Pakistan to the islands of the Pacific, and it would like to see the strategy operationalised by pursuing EU economic interests, addressing regional threats to EU strategic interests, tackling economic coercion by systemic rivals, and dealing with climate change and environmental considerations. On top of these criteria, the new strategy should encompass international, cyber, and maritime security, as well as global value chains, health, poverty, migration, human rights, and the international rule of law.

EU Indo-Pacific strategy

For the Netherlands, the political driver behind the Indo-Pacific concept is to recognise the economic and geopolitical importance of the region and to strengthen the European Union's ability to act. Against this backdrop, the adoption of an Indo-Pacific strategy would represent an assertion of EU strategic autonomy, while at the same time underscoring the importance of the transatlantic alliance. In this sense, the Netherlands holds that Australia and the United States should be regarded as the EU's main partners in the region, along with Canada and countries belonging to the Association of Southeast Asian Nations (ASEAN). Depending on the ultimate nature of the initiative, further partners, such as Sri Lanka, could be included.

European security

The Dutch government sees security as a priority for inclusion in the EU's Indo-Pacific strategy, particularly as the region's geopolitical relevance continues to rise. It believes that the EU should invest more in maritime and cyber security, as well as counterterrorism. Concretely, the Netherlands

would give support to the potential maritime security pillar of the strategy by contributing to freedom of navigation operations, recalibrating arms exports, and enhancing humanitarian assistance and disaster-relief capabilities. Moreover, it would send warships to the region, and fund bilateral cooperation programmes as well as EU programmes. The Netherlands would regard both marine sustainability activities and fishery management as somewhat relevant: it would be willing to consider getting involved in these domains, but these are not key drivers within the current Dutch Indo-Pacific strategy.

Economic development

Discussion about connectivity in the Netherlands is taking place, and complements the Dutch strategy. This document states that, in the framework of the EU connectivity strategy, the Netherlands will focus on digital, addressing a range of themes including cyber security and internet regulation, innovation, artificial intelligence, e-commerce, cross-border data transfer, privacy, and national digital sovereignty.

The Netherlands is also prepared to join EU initiatives to strengthen Europe's strategic autonomy, including taking part in current discussions about how best to strike a balance between the diversification of supply and value chains on the one hand and the reinforcement of global and multilateral free trade systems on the other. The country is also prepared to join in on implementing the European Green Deal at the international level, working in cooperation with like-minded Indo-Pacific partners. The Dutch connectivity agenda is seen largely as a balancing game to China's Belt and Road Initiative, but the Netherlands would not go so far as to define it as a tool of coercion, because it would propose an alternative rather than pursue a direct competing strategy. Although it is a country heavily reliant on international trade, few conversations are taking place in the Netherlands about the need for deglobalisation. That being said, the covid-19 crisis has ignited debates about the need for greater EU strategic autonomy. On whether to establish new free-trade agreements in the region, the government would like to see negotiations with Australia and New Zealand conclude soon. In this sense, it would be open to further agreements with India and the Association of Southeast Asian Nations (ASEAN). The question about whether to establish such an agreement with China remains delicate, with the answer dependent on Beijing's preparedness to adopt to EU standards. In the technology domain, the Netherlands would pursue innovation and commercialisation first, followed by data governance, research and development cooperation, and the responsible use of AI.

Poland

View of the Indo-Pacific

Warsaw's debate about the Indo-Pacific is driven by the Ministry of Foreign Affairs, and with regard to the country's own defence and foreign policy goals the region is seen as only somewhat important. In geographical terms, Poland's idea of the Indo-Pacific ranges from Pakistan to the islands of the Pacific, and the operational definition that it believes the European Union should adopt would include promoting EU economic interests, tackling regional threats to EU strategic interests, and responding to economic coercion by systemic rivals.

EU Indo-Pacific strategy

Poland understands the Indo-Pacific as both a field of opportunity for Europe and a strategic tool against China. The adoption of the EU Indo-Pacific strategy in this sense would be considered to be an alignment with the United States. The countries that Poland would regard as key partners in the region would be India, the US, and Japan, as well as Indonesia, Vietnam, and the Philippines. In this regard, the democratic character of a potential partner country is not seen as an important criterion.

EU Indo-Pacific strategy

The inclusion of a security dimension in the Indo-Pacific strategy would be regarded as relatively important by Poland, which would like to see more EU investment in maritime and cyber security, as well as counterterrorism operations. Should a maritime security pillar be incorporated in the eventual strategy, Poland would support it by contributing to freedom of navigation operations, the enhancement of humanitarian assistance and disaster-relief capabilities, and the funding of both bilateral and EU cooperation programmes. It would regard marine sustainability activities and the sustainable management of fisheries as secondary, but it may support them by establishing fishery control activities in the region.

Economic development

Discussion about connectivity in Poland is related mainly to Europe and western Eurasia and is concerned with the Indo-Pacific only indirectly, via China's Belt and Road Initiative, as well as Poland's participation in China's "16+1" framework. There is still no discussion in Poland about the implementation of multilateral standards for quality infrastructure. Connectivity is understood by Warsaw as a tool of influence and coercion, a key to market access, and a tool to protect EU interests in the region.

No serious discussion on the assistance, financing, and guarantee tools to be employed in the region has arisen as of yet, not least because of Poland's limited individual involvement in the Indo-Pacific. In pursuing a connectivity strategy, it believes that the goal should be to pursue economic interests. In this regard, priority should be given to energy and climate change, digital, and transport infrastructure. Discussion on deglobalisation in Poland is limited to addressing concerns about supply chains, particularly relating to the impact that crises and conflicts abroad could have on Europe. Ideally, Poland would welcome an all-encompassing free-trade agreement with the region, but it is aware of how difficult it would be to achieve this. Australia, the US, and Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) countries would be highly relevant in this regard. On tech, Warsaw would prioritise the establishment of projects concerned with innovation and commercialisation, data governance, and cyber security.

Portugal

View of the Indo-Pacific

Lisbon's debate about the Indo-Pacific is led by the Ministry of Foreign Affairs, which sees the implementation of an EU strategy as a priority for the achievement of its domestic goals on defence and foreign policy. It defines the region as spanning from the east coast of Africa to the Pacific islands, including former Portuguese colonies Mozambique and East Timor. The criteria for deciding how to operationalise the strategy include EU economic interests, regional threats to EU strategic interests, and climate change and environmental considerations.

EU Indo-Pacific strategy

Portugal understands the Indo-Pacific as a field of opportunity for Europe, and also as an anti-China strategic tool. Lisbon believes that adopting a unified strategy on the region would represent an assertion of European strategic autonomy, an alignment with the United States, and a tool to manage the transatlantic alliance. In the region, Portugal would prioritise the establishment of partnerships with the United Kingdom, the US, India, and Japan. Moreover, the Association of Southeast Asian Nations (ASEAN) and countries belonging to the Community of Portuguese Language Countries – Mozambique and East Timor in particular – should be regarded as potential partners as well.

European security

With regard to the implementation of a security dimension in the new Indo-Pacific strategy, Portugal has mixed feelings: security activities carried out under the strategy would be important in terms of defending global goods, but should not aim to tackle specific interstate territorial disputes. Lisbon

would encourage the European Union to concentrate funds on maritime and environmental security, as well as crisis management and conflict mediation. It would support this endeavour by contributing to freedom of navigation operations, by enhancing humanitarian assistance and disaster-relief capabilities, and by funding EU programmes.

Mirroring its domestic stance on the issue, Portugal attributes great importance to the issue of maritime security, but it acknowledges that its limited national capacities would lead to a limited direct contribution to this domain in the Indo-Pacific region. While Portugal is committed to the issue of sustainable management of fisheries, its lack of significant fishing fleets with industrial capacity would reduce the impact it could have.

Economic development

The question of connectivity – while still far from having entered public discourse – is gaining traction in Portuguese political discourse and media. The debate is mostly focused on the dimension of port connectivity with the Atlantic, namely Portugal's port at Sines, which in recent years has raised eyebrows because of China's control of one terminal, and interest in a second. There is still no debate about the implementation of multilateral standards, but Portugal supports the G20 Principles on Quality Infrastructure Investment. Its stance vis-à-vis connectivity is mainly to view it as a tool against threats to EU interests, a key to market access, and an instrument of influence and coercion. Ultimately, Portugal would like to make sure that the principles of sustainable, comprehensive, and international rules-based connectivity described in the "Strategy on Connecting Europe with Asia" are followed, particularly under a framework guaranteeing reciprocity and a level playing field. Lisbon is not yet having a discussion about the assistance and financing tools to be employed, though the government would likely favour multilateral tools. Funding for connectivity projects in the Indo-Pacific region should be flexible, open to different global and regional stakeholders, and aiming to promote effective rules-based multilateralism. It should not be dependent on bilateral funding alone, especially in situations where there is a clear asymmetry of financial capacity between the parties involved. The criterion to prioritise connectivity infrastructure would be economic interest, as a stepping-stone for the further promotion of democracy, the rule of law, human rights, and international law.

A renewed discussion about deglobalisation is taking place, and has gained traction since the outbreak of covid-19. In general the debate revolves around the need to rethink global value and supply chains, and the need to find more proximate suppliers and reduce the risks of global interdependence. There is also some talk about the need for Europe (and Portugal) to reindustrialise and to transition to a more digital economy. Similarly, Portugal has experienced a new wave of conversation about diversification and reshoring, driven by the argument that the country may benefit from a

reorganisation of global value chains. Lisbon has always been in favour of multilateralism and would be a big supporter of free-trade agreements that involve many countries in the Indo-Pacific. However, given the huge size and complexity of the region, it would give preference to targeted bilateral agreements.

Romania

View of the Indo-Pacific

Romania's policy on the Indo-Pacific region is fronted by the Ministry of Foreign Affairs, which places a high priority on the formation of a European strategy. Its preferred geographical definition of the Indo-Pacific would see it span from the east coast of Africa to the west coast of the Americas. Desired criteria for the strategy's operational definition would include the promotion of EU economic interests, the avoidance of regional threats to EU strategic interests, and the defence against economic coercion by systemic rivals.

EU Indo-Pacific strategy

The Ministry of Foreign Affairs maintains that the Indo-Pacific concept is both a field of opportunity for Europe and a key anti-China strategic tool. For Romania, adopting an Indo-Pacific strategy would form part of managing the transatlantic alliance. In terms of establishing partnerships, Romania believes Europe should not simply partner with countries with a strong democratic character, though it does accord some importance to this aspect. For Romania, the United Kingdom, the United States, and China are the most important potential partnerships to establish in the region, as well as countries belonging to the Association of Southeast Asian Nations (ASEAN), particularly those that are "like-minded" at a multilateral level, such as Singapore.

European security

Romania's Ministry of Foreign Affairs states that security activities would be an important component of an EU Indo-Pacific strategy. This is because it wishes to remain aligned with transatlantic partners, with NATO membership featuring highly in considerations. This is despite the fact that there are more proximate security threats for Romania, namely Russian aggression in the Black Sea region.

According to Romania, the most important security domains for the European Union to invest in are cyber security, and crisis management and conflict mediation. To achieve maritime security in the Indo-Pacific, Romania would be willing to contribute to freedom of navigation operations, recalibrate its arms exports, enhance humanitarian assistance and disaster-relief capabilities, and help fund EU

programmes.

For Romania, marine sustainability is not the highest priority, but is still somewhat important. Its relevance for Romania lies in achieving sustainable maritime shipping, as the country benefits from shipping through its own ports and operations. This is, however, not a central issue. Similarly, the sustainable management of fisheries is also only somewhat important, given its small fish products market. However, to align with EU policy it would support this.

Economic development

The discussion of connectivity infrastructure in Romania splits into two major topics: that of internal and domestic connectivity, and that of external connectivity. Discussions about internal connectivity on Romania have focused on how it lags behind other EU member states. The government has released a National Recovery and Resilience Plan to address issues concerning households' connection to the gas and electricity grids. Discussions of external connectivity focus on energy connectivity and regional energy projects. Key to this is the BRUA gas pipeline, as well as Bucharest's hopes that Romania will secure a key role in managing the Black Sea-Caspian Sea Transport Corridor. Following these internal connectivity issues, Romania would be unlikely to support implementing multilateral standards for quality infrastructure investments, as it would likely be unable to apply such standards itself, or impose them on others. Connectivity in Romania is primarily seen as part of development policy, as well as a key to market access. It is less commonly understood to be a threat to European interests or an instrument of influence. With regard to the Indo-Pacific, there is no clear Romanian approach to connectivity projects. However, it would be reasonable to expect Romania to follow Brussels's approach to remain aligned with fellow EU states. Discussion about methods of mobilisation for Indo-Pacific connectivity projects has not advanced much within Romania. The country holds that the EU priorities for Indo-Pacific connectivity strategies should focus most on digital and transport infrastructure.

There is no significant mainstream discussion of deglobalisation within Romania, as the country has largely benefited from globalisation in recent times. When such discussions do arise, it is led by marginal and fringe political groups, and these are often influenced by Russia-driven propaganda that claims globalisation is a danger to “national, Orthodox values”. Discussions about diversification and reshoring of supply chains did substantially emerge within Romania following medical supply shortages during covid-19. However, as supplies were restored, discussions focused on how the EU should consolidate the single market and its resilience. Since Romania is a relatively small market reliant on the EU’s power of negotiation, even with discussions of diversification and reshoring of supply chains, few practical suggestions have been made.

On the topic of bilateral free-trade agreements (FTAs), Romania has been both a supporter and promoter, including during its presidency of the Council of the EU. This includes the EU-Singapore agreement, which it endorsed shortly after assuming the presidency. There is, however, little clarity in Romania’s position on future bilateral or all-encompassing FTAs, or if these should include China. The countries it would see as most key in aiding the FTA effort are India, Japan, and Indonesia, with competition policy and regulations on subsidies and state-owned companies being the most important aspects of future FTAs. In terms of technology, Bucharest would hope to focus most on innovation and commercialisation, followed by 5G partnerships and cyber security.

Slovakia

View of the Indo-Pacific

Discussions about the Indo-Pacific are primarily led by the Ministry of Foreign Affairs in Slovakia. However, there appear to be disagreements among the various ministries. For Bratislava, a European approach to the Indo-Pacific is only somewhat important, and it would seek to geographically define the Indo-Pacific as ranging from Pakistan to the islands of the Pacific. In terms of an operational definition, Bratislava would use the criteria of EU economic interests, regional threats to EU strategic interests, economic coercion by systemic rivals, climate and environmental considerations, and connectivity.

EU Indo-Pacific strategy

The Ministry of Defence and the Ministry of Finance each see the Indo-Pacific as both a field of opportunity for Europe and an anti-China strategic tool. However, the Ministry of Foreign Affairs described the issue as “not recognised”. More departmental disagreement comes from the way in which an eventual EU Indo-Pacific strategy would be interpreted, with the Ministry of Foreign Affairs

stating that it would be an assertion of European strategic autonomy. The Ministry of Defence, though, views it also as a way of managing transatlantic alliances, and the Ministry of Finance sees it as a way of aligning with the United States. These disagreements continue in discussion of who key partners in the Indo-Pacific should be, with the exception that all ministries ranked the US as the most important partner. The Ministry of Foreign Affairs and the Ministry of Finance also prioritised Australia and China, while the Ministry of Defence prioritised the United Kingdom and Australia. The Ministry of Foreign Affairs also considers countries belonging to the Association of Southeast Asian Nations (ASEAN) to be important partners. The democratic character of these countries would also be heavily considered when deciding their partnership.

European security

The Ministry of Defence places significant focus on the security activities involved in an EU Indo-Pacific strategy, framing them as very important in a time of rising challenges and tensions in the region. The focus of EU security investment should be on maritime, environmental security, and counterterrorism, with particular effort to be made on cyber security as well as crisis management and conflict mediation. To support a maritime security strategy, Slovakia would be willing to enhance humanitarian assistance and disaster-relief capabilities. The Ministry of Foreign Affairs also stated that Slovakia would provide political support. Marine sustainability would not be the highest priority for Bratislava, but it is still somewhat important, as sustainable and green socioeconomic recovery are necessary following the covid-19 pandemic. Similarly, sustainable management of fisheries would also only be somewhat important to Slovakia, but they would be willing to contribute by establishing and contributing to fishery control activities in the area, with the Ministry of Foreign Affairs suggesting that South Korea could provide political support in connection to policy focused on rivers and lakes.

Economic development

Slovakia has had some level of discussion about connectivity infrastructure, especially about how it relates to China. The mood in the country has become increasingly sceptical of Chinese-funded infrastructure projects, and Slovakia has a history of high saturation of 4G but has been slow to develop 5G and fibre optic capabilities. There are, however, no significant discussions about implementing multilateral standards for quality infrastructure investments. Bratislava's understanding of the definition of connectivity divides along departmental lines, with the Ministry of Finance focusing on connectivity as a key to market access and a part of development policy, while the Ministry of Foreign Affairs focuses on it as a threat to European interests. There is little discussion of ways to assist, finance, or guarantee connectivity projects outside Slovakia, as due to the covid-19 pandemic the Ministry of Finance has stated that it has been focusing on domestic projects. The

Ministry of Finance has also indicated a preference for future Indo-Pacific connectivity projects to be based on mobilising the European Investment Bank, with a focus on transport and digital infrastructure, and motivated by economic interests.

There has not been a significant discussion about economic deglobalisation in Slovakia – only in terms of protecting cultural traditions. Similarly, there has been little to no discussion of the diversification and reshoring of supply chains. In terms of free-trade agreements (FTAs), Slovakia is most in favour of bilateral FTAs, to make them as comprehensive as possible, according to the Ministry of Foreign Affairs. Meanwhile, the Ministry of Defence places more focus on bilateral FTAs with like-minded strategic partners. Such key partners would include Australia, Japan, members of the Association of Southeast Asian Nations (ASEAN), South Korea, Taiwan, and the United States. For Slovakia, the environmental and social standards of FTA partners are only somewhat important, as are competition policy and the protection of the climate and intellectual property rights. Regulation of subsidies, however, would be very important. Slovakia believes research and development cooperation, data governance, and 5G partnerships would be the most vital technological aspects of a Trans-Pacific strategy.

Slovenia

View of the Indo-Pacific

Slovenia's approach to the Indo-Pacific is led by the Ministry of Foreign Affairs, which believes a European approach to the region is very important to its defence and foreign policy. It defines the Indo-Pacific as the countries that are either in or border the Indian and Pacific oceans. According to Ljubljana, the forthcoming strategy should focus on the European Union's economic interests, regional threats to EU strategic interests, and economic coercion from systemic rivals.

EU Indo-Pacific strategy

Slovenia sees the Indo-Pacific as an economic alternative to China, but does not necessarily think that a strategy on the region should become a tool to use against China. It views the European Union as being able to play a role in balancing China's ability to leverage its growing economic presence to form voting blocs in the UN General Assembly, as well as diversifying and balancing systemic influence over Indo-Pacific countries. . Slovenia would, however, still see the adoption of an Indo-Pacific strategy as a move by the EU to align with the United States. Key partners in the Indo-Pacific should include the United Kingdom, followed by the US and China. Ljubljana also sees smaller and medium-sized countries in south-east Asia as potential partners, such as Malaysia, which is a country significantly smaller than China but which has economic potential. When deciding which countries

would be best to partner with, Slovenia sees the democratic character, or otherwise, of a country as only somewhat important.

European security

Ljubljana regards security activities within an EU Indo-Pacific strategy as somewhat important; along with the Trump administration it co-signed a declaration on the security of 5G, which was effectively targeted at China. Similarly, in the programme for Slovenia's Council presidency, it included the term "digital sovereignty" and the need to work with partner democracies in the Indo-Pacific. The security domains to prioritise for EU funding under the rubric of the strategy would be cyber security and crisis management and conflict mediation.

In terms of maritime security, the support Slovenia would offer includes enhancing humanitarian assistance and disaster-relief capabilities, funding bilateral cooperation programmes, and providing political support on legal issues regarding the South China Sea, specifically on issues of international law and the law of the sea. Maritime and fishery sustainability do not rank as high for Slovenia as other countries; it has only a very small fishing fleet, just a single navy ship, and an uncertain future regarding their economic rights in the Adriatic Sea.

Economic development

Discussion of connectivity infrastructure within Slovenia remains at an early stage, focusing largely on countries in its own neighbourhood and further integrating with them. With regard to the Indo-Pacific, Ljubljana sees transport infrastructure as a strategic tool in the region, especially in supporting the global economy in the future. 5G infrastructure discussions have gathered pace in Slovenia, which called for the creation of a European certification scheme and for suppliers of the equipment of core and peripheral telecommunication networks to comply with security standards in line with the EU's 5G toolbox.

Slovenia has also seen significant discussions on implementing multilateral standards for quality infrastructure investments domestically. Large Chinese construction companies such as Ginex International are banned from participating in major infrastructure projects in Slovenia, following their failure to sign the WTO agreement on open public procurement or come to an agreement on public procurement with the EU or with Slovenia. In Slovenia, connectivity is understood as primarily an instrument of influence or coercion, as well as a key to market access. The country does not have a specific position on what assistance financing or guarantee tools it would favour in supporting Indo-Pacific connectivity projects, other than that preference should be given to the EU's financial instruments, especially the European Investment Bank. In terms of strategy, Slovenia would prioritise

digital infrastructure, followed by transport infrastructure. It also wants to see a proactive approach towards any possible vital security threats, systemic coercion, or regional hegemony while the EU pursues its own economic interests in connectivity infrastructure projects.

There is little focused discussion on deglobalisation within Slovenia, but scepticism regarding globalisation has grown especially since the “migration crisis” in 2015 and has gained further traction during the covid-19 pandemic. The country’s centre-right government frames Slovenian national interests in terms of sovereignty – in opposition to migration, multiculturalism, and overreach by international organisations. Parts of academia criticise neoliberal models of international growth resulting in environmental and social dumping. There are, however, some focused discussions in Slovenia on diversifying and reshoring supply chains, especially food and agriculture, due to the country’s national trade deficit, market price fluctuations, and competitive pressures within the sector. With the covid-19 pandemic Slovenia sees value in strengthening the resilience of individual sectors to crises that result in shortages of supplies or interruptions in export and demand markets.

Ljubljana believes that bilateral free-trade agreements (FTAs) should be given initial priority, with future comprehensive regional FTAs coming down the line. This strategy is specifically intended to exclude China. As a small and open economy where trade makes up more than 100 per cent of its GDP, Slovenia has historically supported international trade agreements negotiated by the EU, and specifically supports a rules-based trade policy that is against protectionism and supports international standards and equal competition. Slovenia specifically backs the formation of a comprehensive trade agreement with transatlantic partners, describing the US as a key partner in the formation of FTAs, as well as Indonesia, India, and Australia. Potential partners’ environmental and social standards are only somewhat important to Slovenia, and climate protection is not important. Of much greater priority would be issues around protection of intellectual property rights and competition policy. Slovenia would prioritise cyber security and 5G partnerships in technology policy with regard to the Indo-Pacific

Spain

View of the Indo-Pacific

Spain’s Indo-Pacific policy largely focuses on Europe maintaining independent strategic autonomy. The Ministry of Foreign Affairs leads Spanish discussions on Indo-Pacific matters and envisages a European approach to the Indo-Pacific as only somewhat important. Madrid considers the Indo-Pacific to be geographically defined as spanning from the east coast of Africa to the west coast of the Americas. An EU Indo-Pacific strategy in action would focus on EU economic interests, with the Indo-Pacific representing an opportunity for Europe and the adoption of an EU Indo-Pacific strategy

indicating an assertion of European strategic autonomy.

EU Indo-Pacific strategy

For Spain, the most important partners in the Indo-Pacific would be Japan, Australia, and South Korea, as well as Vietnam and the Association of Southeast Asian Nations (ASEAN). However, the partner it sees as most key is China, because of its crucial position within the region and the entire globalised system. This leads Madrid to promote the discovery of common ground and “balance” with China. A potential partner’s democratic character is only somewhat important for Spain.

European security

For Spain, security activities would not be a priority for an EU Indo-Pacific strategy. They should feature, but other aspects such as connectivity are more important. The security areas Spain would like the EU to most invest in are maritime, cyber, and environmental security. In support of a maritime security pillar of a strategy, Spain would be willing to contribute to freedom of navigation operations, establish and increase its military presence, recalibrate its arms exports, enhance humanitarian assistance and disaster-relief capabilities, send warships to the Indo-Pacific, fund bilateral cooperation programmes, and fund EU programmes. Spain not only values maritime security but also sustainability, which it claims to be a necessary core of any EU strategy. This is because of the numerous issues with sustainability in the Indo-Pacific, such as tackling overfishing and climate change. Spain sees EU assistance in marine sustainability as an indicator of its commitment to the region. Spain places much less emphasis on the sustainable management of fisheries, however.

Economic development

Debate about digital connectivity has grown in Spain since the covid-19 pandemic, with the reliance on digital means for remote working and education during quarantine revealing a dearth of connectivity resources available for middle- and low-income families even in large cities. The pandemic also further revealed the inadequacy of infrastructure in rural areas of Spain, not only digital infrastructure but also in terms of transport. There is no significant discussion in Spain about implementing multilateral standards for quality infrastructure investments. For Spain, connectivity is defined most as a threat to European interests, and as part of development policy, though discussions about connectivity are largely limited to academia or think-tanks. Spain’s connectivity policy is driven by the European Connectivity Strategy, meaning there is also little to no debate on national assistance or tools for supporting connectivity projects in the Indo-Pacific. In terms of ways to support connectivity projects in the Indo-Pacific, Spain argues that ideally the European Connectivity Strategy would be funded via both public and private projects, such as by European countries, multilateral

donors, and the European Investment Bank. Spain does not prioritise transport, digital, person-to-person, or environmental infrastructure, as it believes that all these are interconnected to the point where success in one requires effective functioning within all the others. It does, however, see economic interests as the primary criterion for connectivity projects.

There is no significant debate about deglobalisation in Spain, though there is some about sustainability and a circular economy. There are worries surrounding the EU-China rivalry, and how that might impact Spain, especially regarding its economy. There is similarly almost no discussion surrounding the diversification and reshoring of supply chains, especially since the resolution of the early pandemic-era medical material shortages. When it comes to free-trade agreements (FTAs), Spain supports additional bilateral FTAs in preference to a broader framework. This is because the European Union would have different goals in agreements with different countries, as would the countries themselves; bilateral FTAs allow for that flexibility. Key potential FTA partners for Spain would be Indonesia, Australia, New Zealand, and China. Spain places high value on environmental and social standards in an FTA partner, as well as climate protection, and competition policy. Less important, but still somewhat relevant, would be the protection of intellectual property, and the regulation of both state-owned companies and state subsidies. The technology component of any EU strategy should focus on research and development cooperation, alongside the future of work and labour, and 5G partnerships.

Sweden

View of the Indo-Pacific

The Ministry of Foreign Affairs leads discussions about the Indo-Pacific in Sweden. Its stance is that a European approach will be only somewhat important in supporting its defence and foreign policy priorities. Sweden defines the Indo-Pacific as the region spanning from the east coast of Africa to the west coast of the Americas. In the European Union's new Indo-Pacific strategy, Sweden would prioritise the EU's economic interests, regional threats to EU strategic interests, climate change and environmental considerations, and international development in the region.

EU Indo-Pacific strategy

In Sweden, policymakers tend to view the Indo-Pacific as an opportunity for Europe, and regards the adoption of an EU strategy as an assertion of "Global Europe", underlining the EU's global role as based on cooperation between partners with shared values and interests. Sweden sees the EU's key partners in the region as being South Korea, the United States, and Australia, as well as Singapore. Stockholm also values partnerships with the Association of Southeast Asian Nations (ASEAN), the

South Asian Association for Regional Cooperation (SAARC), and the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC). How democratic these partners are is important to Sweden but it not the overriding factor.

European security

Sweden sees security activities as only somewhat important to a future EU Indo-Pacific strategy, although its focus would mainly be on maritime, cyber, and environmental security, as well as counterterrorism and crisis management and conflict mediation. To support maritime security strategies in the Indo-Pacific, Sweden would be willing to contribute to freedom of navigation operations, enhance humanitarian assistance and disaster-relief capabilities, and fund both bilateral cooperation programmes and EU programmes. However, marine sustainability activities as part of an Indo-Pacific strategy would rank highly for Sweden, as marine sustainability is already covered by the Common Fisheries Policy. Sustainability in managing fisheries also does not rank as high for Sweden as other priorities do.

Economic development

Some discussions are taking place in Sweden about connectivity infrastructure, and the debate primarily relates to developing domestic transport infrastructure in partner countries, such as modernising railways. There is also broad agreement about the urgency of European investment in global infrastructure, to facilitate trade and mobility. There is no clear discussion about multilateral standards for quality infrastructure investment. “Connectivity” mostly refers to market access and to being a part of development policy. Discussion of connectivity in Sweden does not focus solely on infrastructure, but also on digital and human connectivity, as well as sustainability, green growth, and rules-based competition. To finance and assist connectivity projects in the Indo-Pacific, Sweden supports EU-wide financial backing to strengthen a unified EU approach, particularly through the European Investment Bank. Ideally for Sweden, these projects would prioritise transport and energy infrastructure, and climate change. Sweden would focus largely on connectivity projects that appeal to European economic interests.

Deglobalisation has become a point of discussion in Sweden, especially in the private sector, which fears deglobalisation trends will hurt profits and increase costs. Following the covid-19 pandemic, discussions of deglobalisation have not focused on bringing production back to Sweden, but have instead focused on crisis management and establishing stocks of crisis materials. Following on from this, there are significant discussions about diversifying and reshoring supply chains in Sweden, with the Association of Swedish Enterprise warning that moves towards strategic autonomy that rely on

this would be costly. All the same, some actors are seeking alternatives to China but see few reliable options, fearing India's bureaucracy and historical protectionism, and other economies lacking China's scale.

Sweden sees bilateral free-trade agreements (FTAs) as preferable to all-encompassing regional FTAs within the Indo-Pacific, as it avoids the lengthy negotiations involved in securing the latter.

Stockholm views an FTA between China and the EU as an economic priority, but the general view of the state of human rights in China makes Sweden's future desires unclear. Sweden sees the members of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), India, and Indonesia as the most important future FTA partners. Sweden values environmental and social standards very highly in an FTA partner, as well as measures to protect the climate, intellectual property rights, and competition policy. Technological priorities for Sweden in an Indo-Pacific strategy would include 5G partnerships, responsible AI practices, electrification, decreasing carbon emissions in the Indo-Pacific, and rights in cyber space.

About the authors

Frédéric Grare is a senior policy fellow at ECFR's Asia Programme.

Manisha Reuter is the programme coordinator at ECFR's Asia Programme.

Acknowledgments

The authors would like to thank the French Ministry of Foreign Affairs, the Secrétariat Général de la Défense et de la Sécurité Nationale, and the European Climate Foundation, without whose financial support this research would not have been possible. They would also like to express their gratitude to current and former ECFR colleagues, especially Rafael Loss and Julia Pallanch, for their support in managing the data on which the analysis is based – as well as Adam Harrison, Chris Raggett, and the entire communications team for their editorial work and production of graphics. Special thanks go to Janka Oertel for her tremendous support in helping shape the paper. The project relied more than anything on the tireless work of ECFR's 68 researchers across Europe, to whom the authors are



[1] Authors' calculation based on data from Statista and Cisco.

ABOUT ECFR

The European Council on Foreign Relations (ECFR) is the first pan-European think-tank. Launched in October 2007, its objective is to conduct research and promote informed debate across Europe on the development of coherent, effective and values-based European foreign policy. ECFR has developed a strategy with three distinctive elements that define its activities:

- A pan-European Council. ECFR has brought together a distinguished Council of over two hundred Members – politicians, decision makers, thinkers and business people from the EU’s member states and candidate countries – which meets once a year as a full body. Through geographical and thematic task forces, members provide ECFR staff with advice and feedback on policy ideas and help with ECFR’s activities within their own countries. The Council is chaired by Carl Bildt, Lykke Friis, and Norbert Röttgen.
- A physical presence in the main EU member states. ECFR, uniquely among European think-tanks, has offices in Berlin, London, Madrid, Paris, Rome, Sofia and Warsaw. Our offices are platforms for research, debate, advocacy and communications.
- Developing contagious ideas that get people talking. ECFR has brought together a team of distinguished researchers and practitioners from all over Europe to carry out innovative research and policy development projects with a pan-European focus. ECFR produces original research; publishes policy reports; hosts private meetings, public debates, and “friends of ECFR” gatherings in EU capitals; and reaches out to strategic media outlets.

ECFR is a registered charity funded by the Open Society Foundations and other generous foundations, individuals and corporate entities. These donors allow us to publish our ideas and advocate for a values-based EU foreign policy. ECFR works in partnership with other think tanks and organisations but does not make grants to individuals or institutions. ecfr.eu

The European Council on Foreign Relations does not take collective positions. This paper, like all publications of the European Council on Foreign Relations, represents only the views of its authors. Copyright of this publication is held by the European Council on Foreign Relations. You may not copy, reproduce, republish or circulate in any way the content from this publication except for your own personal and non-commercial use. Any other use requires the prior written permission of the European Council on Foreign Relations. © ECFR September 2021. ISBN: 978-1-914572-13-5. Published by the European Council on Foreign Relations (ECFR), 4th Floor, Tennyson House, 159-165 Great Portland Street, London W1W 5PA, United Kingdom.