

INDO-PACIFIC AS A STRATEGIC IMPERATIVE FOR THE EU: WHITHER AUSTRALIA?

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No global actor can afford to fall short in contributing to a stable, peaceful, and prosperous Indo-Pacific—this particularly applies to a somewhat distracted European Union (EU). The EU should become more central to fostering order in the Indo-Pacific, arguably more than it realizes: It is not taken too seriously as a regional actor beyond economics.

It is critical for the EU to pay special attention to four principal strategic bearings: 1) International order probing and reform is mostly led by Indo-Pacific residents, 2) Indo-Pacific geo-economics will rule the roost only more, 3) The Indo-Pacific will largely determine (any) climate change reversion, and 4) The tech war will mostly play out in the Indo-Pacific.

Thus, awareness of the Indo-Pacific's strategic relevance in the EU must be broadened from a handful of member states and select strategic circles and to greater attention in the media, academic curricula and the private sector. This will require public investment. In dealing with these four bearings, Australia is a critical partner and can act as a bridge between the EU and the Indo-Pacific. Policy action is called for on several fronts and could include:

- The EU needs to act alongside Australia, but also ASEAN, China, India, Japan, the US, and other actors on how to best foster a peaceful, stable, and prosperous Indo-Pacific. The EU has experience with and knows the benefits of well-organized efforts to manage (international) order. One important item on the agenda could be trade rules and regulations, as several Asian states are increasingly more economically nationalistic.
- The EU must expand partnerships and deepen cooperation with countries like Australia, but also India, and Japan. The EU can engage with the Quad and initiatives like the Supply Chain Resilience Initiative (SCRI). The EU must make strategic room for itself amidst the plethora of minilateral and middle-lateral engagements evolving across the Indo-Pacific.
- The EU and Australia should also consider joining the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC). Attaining observer status in BIMSTEC will allow the EU and Australia to engage more deeply with South Asian states and build capacity and capability in securing the Bay of Bengal region.
- Australia and the EU, ranked as two of the foremost donors of development aid, respectively, possess opportunities for closer collaboration in engaging with Pacific Island states. If not, they risk ending up in a development aid competition between themselves and China. Pacific islands have incentives in that context to act in ways that promote that competition, and this is not beneficial to regional order or to EU/Australian interests. Indeed, this trend risks further entrenching China's influence to the detriment of Australia and the EU.
- The EU must unite to address key challenges in the Indo-Pacific effectively. Currently, out of 22 members, only France, the Netherlands, Germany, the Czech Republic, and Lithuania have national Indo-Pacific strategies.

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Introduction

The Indo-Pacific is a global crucible of economic, demographic, security, technological, and climatological dynamics—contributing to the deepening geopolitical competition in the region. No global actor can afford to fall short in contributing to a stable, peaceful, and prosperous Indo-Pacific—this particularly applies to a somewhat distracted EU. The globe’s main economic arteries run through the maritime Indo-Pacific; three of the world’s largest carbon emitters, China, the US, and India, are in the Indo-Pacific; and three of the world’s five largest economies (the US, Japan, and India) have tensions with world’s second-largest economy, China. What happens in the Indo-Pacific affects many in and beyond the region. No other region holds such sway across such a broad spectrum.

Of particular concern to many, including Australia, is China’s growing power projection abilities across the region, claims on most of the South China Sea (SCS), East China Sea and the Taiwan Strait, and the intensifying strategic competition between the US and China. The fault lines between the two are starting to run deeper. China no longer accepts the old US-led order in the Indo-Pacific—one that worked well. The Indo-Pacific construct has also brought South Asia into the broader security and economic order. How does the Indo-Pacific adjust to China, and how can we compel and incentivize China best to adjust to the interests, preferences, and concerns of the Indo-Pacific? While China may prefer an Asia led by Asians, most in maritime Asia prefer to engage with the US, Europe, and Oceania. Indeed, the Indo-Pacific construct can be considered an international effort to incorporate China into a peaceful, stable, and prosperous Indo-Pacific.

If thought of and executed inclusively and constructively, the construct may benefit all stakeholders. Yet, the region is about more than China. Conflicts and tensions abound among several actors. The region is home to most of the world’s nine nuclear powers and is rife with border and territorial disputes. The bigger objective in the Indo-Pacific is to improve order—an amalgamation of the balance of power, dialogue, understanding, cooperation, and the institutions, rules, principles, and

norms that ensure that all actors in the region find an acceptable and sustainable *modus vivendi*. Realizing this *modus vivendi* lies at the heart of the Indo-Pacific challenge.

As one of the major stakeholders in this strategic region with longstanding ties centered around predominantly economic and, therefore, security interests, the European Union (EU) could—and should—become more central to fostering order in the Indo-Pacific, arguably more than it realizes. At the same time, while the EU is absent in most of the region’s economic and security institutions, the EU’s image as a non-confrontational and inclusive bloc shapes its perception as a potential balancing major power, thereby increasing its value. Yet, the EU was and is considered an “extra-regional” actor with “limited” impact—a notion that still holds fast in certain strategic circles.¹ Is the EU falling short in thought, action, or capability in the region?

This policy brief elucidates the critical rationale behind the need for a heightened EU focus on the Indo-Pacific, identifies possible overlooked strategic bearings, underscores the region’s multidimensional nature beyond the SCS, and outlines how Australian interests converge with EU priorities. Additionally, it offers calls to action to enhance EU awareness of and engagement in the Indo-Pacific and expand cooperation with Australia.

The EU is (not) in the Indo-Pacific!

The EU has made headway in its Indo-Pacific awareness and engagement in the last few years—this should be acknowledged. From seeing the Indo-Pacific, or rather Asia, mainly through a China-centric economic lens in much of the first two decades of the century, the lens has now widened geographically to look beyond China. Moreover, the EU, though not all member-states to the same degree, now realizes that its security is inextricably linked to the Indo-Pacific.

This realization has gradually developed due to the EU’s multiple steps in engaging with the region. The EU’s engagement is driven through: its “Strategy for Cooperation in the Indo-Pacific”, released in 2021; its Global Gateway, which is aimed at delivering “quality”

infrastructure projects, and is seen as a tool to compete against China's Belt and Road Initiative (BRI); and its updated 2023 EU Maritime Security Strategy (EUMSS) that solidifies the bloc's "broader" security and defense presence, especially in the Indo-Pacific.² The launch of the EU's Strategy was a landmark event in showcasing the bloc's intent for strategic engagement with local partners, as well as for reconfiguring the security (from economic to maritime domains) dimensions to its overall goal to "maintain a free and open Indo-Pacific."³ The Strategy's seven "priority areas," namely sustainable and inclusive prosperity, green transition, ocean governance, digital governance and partnerships, connectivity, security and defense, and human security, have also widened the EU's scale of engagement.⁴

Nonetheless, even if these efforts have highlighted both the political intent and need for the EU to enhance engagement with the world's center of economic and political gravity, strategic and financial gaps remain. For example, an internal European Commission briefing document on the Global Gateway has reportedly called out the project for being "spread too thinly across too many fronts" and lacking "strategic focus."⁵ Moreover, amid the economic pressures faced by Europe, especially in the wake of the Ukraine war, financing such projects outside Europe has faced scrutiny. It is important to note that only a handful of EU member states, mostly in the northwest, are actively thinking and acting in relation to the Indo-Pacific—though thinly resourced. Beyond the EU Indo-Pacific Ministerial Forum, there is limited pan-EU effort.

Then, there is also the potential for deeper economic cooperation and strategic connections through regional multilateral trade frameworks such as the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)—a mechanism that does not include the US or China as a member—which needs to be addressed.⁶ Such measures could help the EU present itself as more than an export market.⁷ Indeed, the EU needs to work more on its image as a committed and serious actor; it is not taken too seriously as a regional actor beyond economics.⁸

In this regard, among the EU's various Indo-Pacific partners, Australia was one of the first regional democracies in the Indo-Pacific that recognized the value Brussels adds to the region. The degree of cooperation between the two has been modestly increasing, with the Indo-Pacific becoming a more central element in Canberra's engagements with the EU (and EU member states individually).⁹ Today, the EU, at the supranational level, has embraced the Indo-Pacific construct—albeit years after countries like Australia highlighted the concept and the region as critical and as a marker for their foreign and security policy outlooks.¹⁰ Yet, have the EU's efforts moved beyond the obvious, and is it perhaps overlooking or underestimating critical strategic bearings?

The Four Principal Strategic Bearings of the Indo-Pacific for the EU

What the EU may want to pay particular attention to is that the Indo-Pacific is currently the world's premier estate where global stability, peace, and prosperity can be assembled *or* disassembled. The Indo-Pacific's foremost strategic challenges may be China-centric, but the region itself is not *per se*. It is a heterogeneous emerging multipolar system in which the interests and agency of many are formative. The Indo-Pacific is a kaleidoscope of historical, ethnic, religious, economic, and political diversity that is interacting in a latitude and intensity within itself and with the world not seen before historically.

Much of this has to do with the fact that there is a complicated constellation of various emerging and established powers. No other region in the world has this dynamic. Geopolitical tensions between major actors in the Indo-Pacific are ample. Regrettably, there is no pan-Indo-Pacific security or (institutionalized) economic order at the Asia level. Granted, there are (cross-) regional orders, such as ASEAN and ASEAN-led platforms (the EU, of course, is an ASEAN dialogue partner), the Pacific Islands Forum (PIF), and Asia-Pacific Economic Cooperation (APEC). While these are not security-related but economic and political in nature, they (aim to) contribute to peace, stability and

prosperity. Moreover, the US-led web of partnerships and alliances in the Indo-Pacific backs a strategic balance. Yet, the Indo-Pacific economic order is strongly market-led, and across both economy and security, there are thin and thicker layers of order. In this regard and contrary to, for instance, Europe and North America, the Indo-Pacific finds itself in a formative era of ordering. Most, if not all, actors prefer stability, peace, and prosperity, but not always on equal terms as political elite perceptions, historical, (geo-)political, economic, and other considerations add to a complex mix. The EU cannot count on an invisible hand, the US, or regional partners to order the Indo-Pacific. Without the EU, the efforts of the US and its allies to maintain (their preferred) order are much harder to achieve.

It is critical for the EU to pay special attention to four principal strategic bearings:

1) International Order Probing and Reform is Mostly Led by Indo-Pacific Residents

The international order is being challenged. Of course, no order is static, and the current order is still a work in progress. With the re-emergence of China, India, Russia, parts of the Islamic world, and a host of other actors in the Global South, elements of the international order's legitimacy, efficacy, and hierarchy, particularly the so-called "Liberal International Order" or "Rules-based International Order," are being increasingly questioned.

At the same time, there is a re-emergence of different civilizational and cultural actors and corresponding nationalism after centuries of colonialism and foreign interference, predominantly in China and India and, in part, ASEAN and the Islamic world. The Indo-Pacific hosts most of the world's civilizational custodians, Sinic, Hindu, Islamic, and Orthodox, many of which are waking up from periods of slumber and claiming their rights as their interests expand. In sync with their re-emergence, China and, to a degree, India are actively stepping up to shape the Asian and Indo-Pacific security and economic order.

There is less acquiescence about the liberal indoctrination of the current international order and the US-led West

position atop the hierarchy, and that many of these actors are in the Indo-Pacific. Indeed, this region is also where some critical challenges to the international order, such as to United Nations Convention on the Law of the Sea (UNCLOS), take place. It is imperative that the EU is active at the international/Indo-Pacific order-ing table. If the EU wants to be more than an economic, normative, and regulatory power, it must show that it plays a proactive and constructive geopolitical role in the Indo-Pacific. It is there, where most of humanity and thus most perceptions reside, that the EU can make or break its international image as a geopolitical actor.

2) Indo-Pacific Geo-economics Will Rule the Roost Only More

As China, ASEAN, India, and other Asian and East African economies grow, the EU's geo-economic interests will come to depend more on the Indo-Pacific—not less. The EU and the Indo-Pacific already hold over 70 percent of global goods and services trade while accounting for 60 percent of foreign direct investment flows.¹¹ In other words, as has been often reiterated, the EU's economic, and to a certain degree political, security and stability are intricately linked to the stability and prosperity of the Indo-Pacific region. For example, disruptions to trade routes or regional instability could cripple the EU's economic prosperity. Think supply chain chaos, market breakdowns, and impact on bilateral trade between EU and Indo-Pacific. The dip in trade growth rates during the height of the COVID-19 pandemic (2019-2020) and the recovery in 2022 highlight the risks.¹²

However, other risks get heightened due to the geopolitical landscape, corrupt or coercive trade practices, or policy decisions by key trade partners. Over the past four years, the EU has encountered various disruptions in its supply chains, most stemming from the Indo-Pacific.¹³ As the EU's dependence on the region continues, geo-economic disruptions such as the activities of the Houthi group posing risks to shipping in the Red Sea¹⁴ may multiply without closer EU engagement. Similarly, it is important to note that a Chinese blockade of Taiwan may have an impact twice as large as the 2008 global financial crisis, with global GDP falling by 2.8 percent within a year.¹⁵

3) *The Indo-Pacific Will Largely Determine Climate Change Reversion*

The EU aims to be climate-neutral by 2050, but it also understands that climate action requires collaborative efforts. The Indo-Pacific is one of the major regions where rising sea levels and extreme weather threaten to turn it into ground zero for the impacts of climate change. Equally important is that the region is simultaneously one of the world's principal carbon and greenhouse gas emitters *and* natural carbon absorbers. Ironically, Chinese technology is also at the leading edge of climate change adaptation. As the EU raises its stakes, it is also seeking to fulfill greater responsibilities for global governance on climate—nowhere is this action more important than in the Indo-Pacific. For many countries, particularly low-lying island countries, the impacts of climate change are existential.

In this context, the EU has much to offer regarding green tech, facilitating the transition to sustainable energy and infrastructure, among other benefits. For example, in 2023, the EU's Global Gateway committed to driving the transition to sustainable energy and a resilient economy in Vietnam.¹⁶ The EU is also investing in other Southeast Asian nations like Indonesia via the Just Energy Transition Partnerships by providing up to €1 billion in loans.¹⁷ Another important subregion where climate resilience is needed is the Pacific Islands: Under the Green-Blue alliance, the EU is facilitating sustainable infrastructure building, including hydropower generation.¹⁸ This is a commendable first phase, yet simultaneously, the EU needs to bring together regional actors, particularly with greater means, such as Australia, for more cooperative climate action. It is in the industrializing and densely populated Indo-Pacific where climate change reversion can be most effective.

4) *Wither High-Tech Ambitions: The Tech War Mostly Plays in the Indo-Pacific*

As the US competes with China to maintain its advantage over Chinese efforts to claim technological dominance via various tools, including curbs on high-tech exports or forming alliances such as CHIP-4, the EU's role in the US-China strategic competition gains greater relevance. This is especially true in the

Indo-Pacific, which is gradually becoming the hub of technological innovation. China, for instance, leads in 37 of 44 (NextGen) technologies.¹⁹ Virtually all leading semiconductor manufacturers are based in the Indo-Pacific: The US, Taiwan, South Korea, Japan, and China. It is, of course, not inconceivable that India will step up to become a semiconductor and next-generation technology powerhouse by mid-century.

Over the last decade, the Indo-Pacific has witnessed intense competition in emerging technologies, such as artificial intelligence, quantum computing, and 5G telecommunications. Notably, the region boasts ample access to natural resources and rare earth minerals. Naturally, the EU as a technology power—struggling to find its place in the fourth industrial revolution—will need to be looking to collaborate with the Indo-Pacific on cutting-edge technologies, as well as on developing standards that can mitigate risks related to supply chain resilience, technology leakage, cybersecurity, and others. Yet, despite recognizing the strategic implications of technological competition, the EU has not adequately prioritized its engagement in shaping regional technological norms, standards, and governance frameworks. Many countries in Asia do not wish to see a technology bifurcation or any of 'the four B's' (technology *bifurcation*, Sino-US *bipolarity*, Sino-US *bloc* formation, and *binary* democracy versus autocracy narratives).²⁰ EU efforts to limit bifurcation are welcomed while at the same time integrating the EU technology sector better with that of the Indo-Pacific.

Recognizing Indo-Pacific Strategic Significance Beyond the South China Sea

With these four strategic bearings set out, a geographic imperative exists that requires attention. Undoubtedly, maritime trade via the SCS is of utmost importance to the EU for apparent commercial—about 40 percent of the EU's trade passes through the SCS—and "systemic" interests.²¹ However, given the centrality of China in the Indo-Pacific narrative, mainly how China plays a direct role in the various flash points, including the Himalayas, the Indian Ocean region (IOR), the Taiwan Strait, and

the East China Sea (ECS), European foci can no longer be seen predominantly through the lens of the SCS.

In the strategically located Pacific Islands, China's growing financial clout and military ambitions are of concern to some stakeholders.²² The Pacific Islands, as a group, bring a sizeable number of votes in the UN, considerable exclusive economic zones, and have become part of bigger naval strategizing by China and the US. If this escalates, the EU, as a responsible actor/stakeholder in the wider Indo-Pacific, will need to focus on building a comprehensive strategic presence, including clarity in its response to conflicts.

This is especially important in the IOR, the EU's primary gateway to Indo-Pacific markets. Notably, the western Indian Ocean has been the EU's primary theater of activity. But that has been gradually changing with the Critical Maritime Routes in the Indian Ocean (CRIMARIO), extending to the wider Indo-Pacific, among other steps.²³ Such measures will help support the littorals on maritime domain awareness, as well as help fight terrorism, cybersecurity, and hybrid threats through projects like Operation Atalanta, Coordinated Maritime Presences, and Enhancing Security Cooperation in and with Asia (ESIWA).²⁴ In short, recognizing the multidimensional nature of the Indo-Pacific beyond the SCS is essential for formulating a comprehensive EU strategy that addresses the region's evolving dynamics holistically.

Key Converging Interests between Australia & EU

Australia and the EU are critical partners that share common concerns about maintaining an international order based on rules that are agreed upon and changed where necessary based on consensus, not coercion, and order, to use the Australian Government's formulation, "where no country dominates or is dominated."²⁵ They also share a commitment to not only democratic values but also to foster efforts toward protecting human rights, creating sustainable development, promoting multilateralism, and redoubling climate action. Notably, both seek to enhance economic integration and

connectivity in the Indo-Pacific and to mitigate economic overdependencies. Australia's membership in multilateral trading regimes that promote regional integration like the Regional Comprehensive Economic Partnership (RCEP, of which China is a prominent member) and the EU's multiple projects via the Global Gateway and the EU's commitment to effective multilateralism, including the RCEP, highlight their respective intentions not to be swayed entirely by today's polarizing rhetoric.

In this context, despite the new assertiveness shown by the EU against China, China is still a partner in cooperation, an economic competitor, and a systemic rival. Similarly, for Australia its relationship with China is stabilizing after a period of tension. But, the Australian Government has said it will "cooperate with China where it can, disagree where it must, and engage in the national interest."²⁶

However, with the Ukraine war foreshadowing, mainly in the West, concerns about China's plans to alter the status quo in relation to Taiwan, both Australia and the EU will look to work together more in the Indo-Pacific. Besides, China's burgeoning partnership with Russia (as well as other authoritarian states like North Korea and Iran) plays heavy on the minds of these two US allies. So even as China's rise may appear more of a normative concern to some as China does not pose a direct sovereignty threat to Europe, China's still widening reach, especially in the EU's neighborhood through, inter alia, economic dependencies, should give Europe additional pause. Similarly, China's actions in East Asia and Oceania affect Australian interests.

Despite parallel narratives highlighting convergent interests, there needs to be more effective cooperation or synchronized policies between the two. This is evident in the continued setbacks in negotiations for an Australia-EU free trade agreement.²⁷ Australia and the EU, ranking as two of the foremost donors of development aid, respectively, possess opportunities for closer collaboration in engaging with Pacific Island states. Both entities aim to counter China's growing influence in the region and have allocated significant resources towards energy transition and climate change

initiatives, critical concerns for Pacific Island nations. However, they diverge in their approaches, particularly regarding climate change response strategies.²⁸

Similarly, in areas defining partnerships with Pacific Island states, such as climate action, policing, and maritime security, the EU has launched capacity-building initiatives, albeit independently from Australia. Australia and the EU risk ending up in a development aid competition between themselves and China. Pacific islands have incentives in that context to act in ways that promote that competition, and this is not beneficial to regional order or to EU/Australian interests. Indeed, this trend risks further entrenching China's influence to the detriment of Australia and the EU.

Calls to Action

The EU has ample experience in thinking about how it can best contribute to safeguarding its primarily economic and climatological interests in the Indo-Pacific and assist with the region's ordering and adherence to the rules-based order. Indeed, from the genesis of the nation-state and Westphalian principles to much of the foundations of international order, these mostly hail from Europe. As an ordering great power, therefore, the EU can think and act alongside Australia, but also ASEAN, China, India, Japan, the US, and other actors on how to best foster a peaceful, stable, and prosperous Indo-Pacific. The need to focus on order may seem prosaic, but European states and the EU have experience with and know the benefits of well-organized efforts to manage international order. One important item on the agenda could be trade rules and regulations, as several Asian states are becoming increasingly more economically nationalistic.

At the outset, it is vital to counter the existing perception among some European policymakers about the limited value of the Indo-Pacific. The EU's official standpoint on the region has widened considerably. This is evidenced by the diversity of new strategies and the EU Indo-Pacific Ministerial Forum becoming a regular event. The awareness about this new narrative must also be broadened from a handful of member states and a select strategic circle among policy practitioners and

think tanks to greater attention in the media, academic curricula and the private sector. This will require public investment.

Further, at the policy level, collaborative efforts are essential to safeguard mutual interests in the Pacific. The EU must expand partnerships and deepen cooperation with countries like Australia, India, and Japan. Australia can act as a bridge between the EU and the Indo-Pacific and engage with the Quad and initiatives like the Supply Chain Resilience Initiative (SCRI). The EU must make strategic room for itself amidst the plethora of unilateral and middle-lateral engagements evolving across Asia and the Indo-Pacific.

The EU and Australia should also look to join via the Bay of Bengal Initiative for Multi-Sectoral Technical and Economic Cooperation (BIMSTEC). BIMSTEC has recently acquired "legal personality" after adopting its first-ever Charter.²⁹ This allows BIMSTEC to "enter into structured diplomatic dialogue with other groupings and countries," opening its doors to gaining new members and observers.³⁰ Attaining observer status in BIMSTEC will allow the EU and Australia to not only engage more deeply with South Asian states but also build capacity and capability in securing the Bay of Bengal region, where China's growing activities and presence have rung alarm bells.³¹

Strategy implementation within the EU, however, is only as good as the member states allow it to be. The commitment of member states is critical for forming a holistic and active EU presence in the Indo-Pacific. However, member states hold divergent views, particularly regarding China, hindering cohesive action. Currently, only France, the Netherlands, Germany, the Czech Republic, and Lithuania have national Indo-Pacific strategies; the other 22 members still need one (!).³² The EU must unite to address key challenges in the Indo-Pacific effectively.

Here, it also becomes essential for the EU to recognize the multipolarity that defines today's Asia. For European policymakers, acknowledging that Asian politics is not the same as European politics is a vital step toward

understanding regional divisions.³³ Australia, India, and Japan could emerge as trustworthy partners for the EU to derive support and knowledge from.

Furthermore, for the Global Gateway to better impact the Indo-Pacific, the EU should consider enhancing engagements via regional and national policies like Australia's Pacific Regional Developmental Plan (still under process).³⁴ In this regard, it is good that the EU has already joined the Indo-Pacific Oceans Initiative (IPOI), an "open, non-treaty based, global initiative" aimed at addressing common regional challenges first proposed by India in 2019. Australia is already working closely with India to develop the IPOI in coordination with other partners.

Such developments highlight that the Indo-Pacific is not just a distant concept—it is a strategic imperative for the EU. By working together, the EU and Australia can navigate the challenges and shape a more secure and prosperous future for all.

This policy brief is part of a series of two supplementary policy briefs. The second brief titled "Navigating the Indo-Pacific: How Australia and the EU Can Partner for Peace, Stability, and Prosperity" is scheduled to be published on September 6, 2024.

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