

FORECASTING EUROPEAN SECURITY IN 2025: WILL TRANSATLANTIC TIES TEST EUROPE'S INDO-PACIFIC LIMITS?

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- *In 2025, the Euro-Atlantic alliance faces resilience challenges as Trump's presidency is expected to put pressure on issues like defense burden-sharing in NATO and the Ukraine peace plan.*
- *Almost all EU countries have a great deal of concern and anxiety over the potential isolationist and Putin-friendly Trump policies adding to the weakening of Western strength and coherence.*
- *The complex relationship between Trump and the European far-right also highlights the dangers of a Trump presidency further fracturing European unity.*
- *The declining relative harmony of trans-Atlantic relations would lead to dire consequences for both the essence of the Atlantic Alliance and the future of European security, endangering common values of democracy and the rule of law.*
- *Europe's financial constraints and its immediate security concerns – both of which are expected to be further stressed after Trump assumes office – will limit its geopolitical ambitions, including Indo-Pacific engagements.*
- *Economic ties with China, though vital, demand careful management, while slow progress on an EU-India FTA hinders potential benefits from India's booming economy.*
- *Amid growing global protectionism, the economic partnership with China will need to be nurtured with caution, keeping the already witnessed impact of over-dependence on China's supply chains during the COVID pandemic and the benefits of "de-risking" in mind.*
- *China's security objectives and growing partnership with Russia will make it impossible for the EU to abandon its "free and open" Indo-Pacific aims.*
- *India's future trajectory will significantly impact the EU's ability to achieve its global economic, political, and climate change negotiated ambitions. The EU, hence, has a stake in India's success in negotiating geo-political tension and global economic imbalances in the future. The approach towards India has to go beyond the narrow view of short-term benefits.*
- *Amid rising far-right influence, political instability, and a new EU Commission, Europe must address pressing domestic issues like inflation, energy crises, and migration while reinforcing security.*
- *To succeed, the EU must stabilize internal fragmentation and engage Donald Trump through the personal diplomacy he favors.*

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In late December 2024, Finland—one of the latest entries to the North Atlantic Treaty Organization (NATO)—seized an oil tanker, with alleged links to Russia’s so-called “shadow fleet,” on grounds of “grave sabotage.”¹ The vessel is suspected of damaging a subsea cable network connecting Estonia and Finland, the two European Union (EU) and NATO members that are staunchly defending Ukraine’s fight against Russia.² Moreover, as other such incidents of infrastructure disruptions allegedly by not just Russia but also China have come to light, there is greater concern over escalating hybrid activities, many of which are unprecedented in scale and potential impact.³ The concerns around Europe’s security have assumed greater importance for the coming year and beyond, with renewed discussions over how the EU and NATO have to do more to protect critical infrastructure and safeguard European security.

China’s centrality in Europe’s economic challenges and policies (e.g., investigations into Chinese trade malpractices), besides the aforementioned sabotage tactics, means that the EU and its members can ill-afford to sideline China as a strategic challenge. There is a certain ambivalence about Chinese power among many member-states of the EU.⁴ The Indo-Pacific, in this context, offers an opportunity for transatlantic cooperation to counter the problematic Chinese economic behaviors. This poses several key questions for Europe: Can the EU and NATO balance their strategic outlook vis-à-vis both Russia and China? How will the strain on transatlantic relations impact Europe’s approach to security and defense issues, and, in particular, its engagement with the Indo-Pacific? Will the EU’s Indo-Pacific strategy outreach lose steam? What of the EU’s relationship trajectory with an economically strong, stable India?⁵

Raging Wars and Brewing Contexts

Undoubtedly, the authoritarian convergence among China, Russia, Iran, and North Korea is also challenging liberal democratic powers, ideas, and

their resilience.⁶ Further, the raging wars (particularly the Israel versus Hamas/Hezbollah/Iran conflict) and changing regimes (Syria) in West Asia (the Middle East) are also causing instability in Europe with the eruption of multiple power centers as well as power vacuums. For Europe, an Israel-Palestinian conflict is not just another Middle Eastern affair, but one that polarizes public opinion as it pits Europe’s sense of historical responsibility and its aspiration to be a normative global actor. Arguably, the EU has not seen such deep divisions over a major foreign policy crisis since the 2003 U.S. invasion of Iraq. The regime change in Syria is, on the other hand, an encouraging sign in terms of the potential “safe, voluntary, and dignified” return of the Syrian refugees and a “strategic opportunity” for Europe.⁷

Yet, the process of rebuilding Syria is only just beginning, and Europe will be eager to engage constructively with stakeholders to ensure security and stability in the region. At the same time, Europe’s own troubles, from its stagnating economy to rising political upheavals that are destabilizing the unity of EU and NATO members, will need the maximum attention.⁸ European capitals struggle to rein in and tackle surging deficits amid dwindling tax revenue. This juncture is further becoming perilous for the continent’s prosperity, as the EU is becoming an innovation desert with flagging competitiveness. This presents an existential challenge in a fast-changing world.

On top of this, Trump’s ascendance to power in the U.S. is expected to strain transatlantic relations and create fresh challenges for Europe. This brings back reflections of the past. The relationship between the United States and Europe could be termed as uneasy and uncertain during the Cold War and the post-Cold War era. Tensions and disagreements were profound among sovereign states on both sides of the Atlantic. In the same vein, the Atlantic Alliance seemed to be an endangered species during Trump’s last regime as he wanted to withdraw from NATO for good.⁹ Donald Trump’s “America First” policies

and his disgruntlement with the EU and NATO, primarily over spending issues and a transactional outlook that rejects multilateralism needs, are of particular note here. In February 2024, he made a statement at a campaign rally in South Carolina that if he was elected president again, he would not be inclined to defend any NATO member who had not paid up.

Trump's clear mandate on trade and the Ukraine war, for instance, will likely enable swift policy changes that follow his nationalist and transactional approach to international politics and could exacerbate Europe's challenges even further. Almost all EU countries have a great deal of concern and anxiety over the potential isolationist and Putin-friendly Trump policies adding to the weakening of Western strength and coherence. The declining relative harmony of trans-Atlantic relations would lead to dire consequences for both the essence of the Atlantic Alliance and the future of European security, endangering common values of democracy and the rule of law. Additionally, America is by far the most important destination for European goods, with more than €500 billion in annual exports to the U.S. from the EU.¹⁰ As a result, as per reliable reports, NATO, the EU Commission, and many individual EU countries are drawing up contingency plans on how to deal with a second Trump presidency, which would likely undermine the Atlantic Alliance. At the same time, a good communication channel is a must between the U.S. and Europe on both sides of the party lines.

Against such a dismal scenario, what of the European pivot to the Indo-Pacific, including the EU-India burgeoning ties, which have only received some impetus in the recent past? The future of the rule-based international order demands evolving strategic dynamics in the Indo-Pacific. Europe has been stepping up its role by leveraging a strong economic profile, long-standing bilateral ties, and active engagement in various regional multilateral forums. However, it is clear that so

long as Russia's war in Ukraine continues, Europe's defense needs will trump any new endeavors that have greater financial and strategic requirements. Yet there are also debates that are questioning the EU's "obsession" with defense, with calls for the EU to mobilize different kinds of power to shape international trends.¹¹

Transatlantic Unity Test amid Europe's Deepening Domestic Chaos

No other part of the world and its leaders have been more concerned about the return of a Trump presidency in the U.S. than in Europe, exceptions like Hungarian Prime Minister Viktor Orbán and other populist right-wingers in France, Germany, and the Netherlands notwithstanding.¹² For many of Europe's far-right parties, Trump is a powerful partner or an ally. While Italian Prime Minister Giorgia Meloni hailed the historic friendship between the two, Alic Weidel of Germany's far-right party (Alternative for Germany, AfD) celebrated Trump's victory as a "model" for them.¹³ Still, the populist leaders have a limited convergence with Trump's policies: While his tough stance on immigration is welcomed almost universally by such parties, opposition to NATO, hawkish stance on China, and trade tariffs on Europe will not be accepted by all.

For example, Meloni is committed to aiding Ukraine and NATO's collective defense goals.¹⁴ Similarly, Hungary (also a NATO member) and Serbia, where China already enjoys enhanced patronage and is looking to them as "strategic European outposts," will be tested in their support for Trump on topics related to China.¹⁵

Nonetheless, this complex relationship between Trump and the European far-right also highlights the dangers of a Trump presidency further fracturing European unity. Already, Europe is facing one of its worst periods in terms of political stability, with two of its most powerful states, namely France and

Germany facing a political crisis of sorts. In 2024, France appointed four prime ministers, with the current government also looking to avoid another no-confidence motion amid strong parliamentary divisions;¹⁶ and French President Emmanuel Macron has become deeply unpopular.¹⁷ Similarly in Germany, not only did Chancellor Olaf Scholz lose parliamentary majority in November, the country is grappling with “high energy prices, high wage levels, the deterioration of infrastructure, a shortage of skilled workers, and too much bureaucracy,” among other issues.¹⁸

Furthermore, member-states continue to disagree on a variety of issues, including threat assessments regarding the Ukraine war. Whereas Poland remains firm that the war can only end after a return to recognized borders, France is now urging Ukraine to engage in “realistic discussions on territorial issues.”¹⁹ Meanwhile, Slovakia’s prime minister is threatening to cut financial support for Ukrainian refugees in his country.²⁰

In addition to such challenges, Trump is already threatening to burden the EU with trade tariffs if Europe does not buy more American oil and gas.²¹ In December 2024, President-elect Donald Trump added the 27 countries that make up the European Union to the list of trade partners threatened with tariffs. This was the result of the United States trade imbalance with the EU. In 2023, as per the Census Bureau, there were \$576 billion in imports from Europe and \$367 billion in exports from the United States. The United States’ trade imbalance with the EU on goods was \$209 billion. While the EU is already looking for alternative options to diversify from its dependence on Russian energy sources, such tactics will surely be a strain on transatlantic ties in the coming months, if not creating a trade war scenario. Ukraine’s latest refusal to renew the energy deal with Russia will compound Europe’s energy problems,²² even as the EU members are readying for diversification via imports from states including the U.S. and Qatar.

Besides, the Ukraine war is threatening to derail Europe’s fragile security concerns. Russia is not only prolonging the political, economic, and energy repercussions of the war, but it is also engaging in breaching the security architecture through hybrid tactics including cyber-attacks on critical infrastructure in EU/NATO countries that are allies of Ukraine.²³ While Ukraine is unlikely to be given NATO membership anytime soon, a hasty peace plan may also cause complications for Europe as a whole by allowing for Russian dominance in the future.

In such a scenario, worries about the Trump presidency reducing funding for NATO, among other such matters, and its eventual disastrous consequences for European security are justified.²⁴ Amid such concerns, Europe will need to decide how best to prioritize its internal and external economic and security interests.

Making Amends with China: Will Indo-Pacific Take a Backseat?

In recent years, narratives across Europe have time and again reiterated the need to inter-link European and Indo-Pacific economic and security interests. Since 2021, it has been clear that the EU and NATO are interested in expanding their footprint in the region. The EU’s multiple initiatives, including various programs under the Indo-Pacific strategy and its flagship Global Gateway project, have highlighted a political will to boost Europe’s pivot to the Indo-Pacific beyond simple economics.²⁵ Europe by and large has traditionally underinvested in defense spending beyond territorial borders to prioritize more immediate security threats.²⁶ However, the current geopolitical scenario demands an amplification of the political and security role in the Indo-Pacific region. This includes leveraging the growing Franco-British presence and utilizing the EU’s collective role better. It builds over the already expanded security footprint in the Indo-Pacific by major European powers through more regular naval

presence, bilateral and multilateral joint exercises, arms sales, and various other forms of defense cooperation.

NATO, too, via its enhanced association with the Indo-Pacific 4 (IP4, namely Australia, Japan, New Zealand, and South Korea),²⁷ and outreach to India,²⁸ has made its intent for bigger security engagement with the region clear. Similarly, the EU's support for the Association of Southeast Asian Nations (ASEAN) can help foster a more multilateral, cooperative, and engaging Asian security architecture. Given Europe's track record of pragmatic engagement and commitment to multilateralism, diplomacy is central to Europe's contribution to a transatlantic agenda for Asia. This includes building a European consensus on China, participating in regional multilateralism, investing in non-traditional forms of security assistance, contributing to maritime security, leveraging defense exports to the region, and enhancing regional connectivity.

Notably, amid growing global protectionism, the economic partnership with China will need to be nurtured with caution, keeping the already witnessed impact of over-dependence on China's supply chains during the COVID pandemic and the benefits of "de-risking" in mind.²⁹ Currently, the interdependence between the two is significant. Bilateral trade and investment flows between the EU and China have almost doubled in the last 10 years. According to Eurostat, China accounted for around 9 percent of overall EU exports in 2022, behind the U.S. (19.8 percent) and the UK (12.8 percent).³⁰

In addition, China was also the largest partner for EU imports of goods (20.8 percent) in 2022. In 2019, the European Commission identified China as a partner for cooperation and negotiation, an economic competitor, and a systemic rival.³¹ This is the so-called triptych approach followed by the EU.³² Nonetheless, it must ensure that it has the regulatory tools to counter distortion and make

supply chains resilient while fostering bilateral and multilateral engagement. But China's security objectives, including upending the liberal world order to introduce a Sino-centric order and China's growing partnership with Russia, will make it impossible for the EU to abandon its "free and open" Indo-Pacific aims.

It would be foolhardy to posit that NATO will be able to build a strategic presence in the Indo-Pacific region, certainly not in the near future: NATO is primarily a European (or Euro-Atlantic) defense mechanism, and its relationships with the IP4 are seen more in the bilateral context than the regional. However, the EU's decision to expand its strategic footprint as a non-confrontational, reliable partner into the Indo-Pacific construct has been a welcome change. In part, this tilt to the Indo-Pacific has been driven by China's role as "a decisive enabler of Russia's war against Ukraine" under the guise of their 'no-limits' partnership.³³ Going forward, the ramifications of the protracted war in Ukraine and Europe's aforementioned domestic constraints will in all likelihood impact the EU's foreign policy objectives in the Indo-Pacific.

EU-India Partnership: Need for Sustained Engagement

The EU's relationship with India is an example of this. The space for India is gradually gaining across all priority areas in the EU's strategic canvas including in its Indo-Pacific strategy.³⁴

This includes supporting green and digital transitions and aiding resilient and diversified value chains in the Indo-Pacific. The EU-India agreement of May 2021 is an example of a partnership the EU seeks to create. It entails resuming the EU-India free trade and investment agreement negotiations as part of the broader EU strategy of deepening economic ties with the region. Simultaneously, India acknowledges the economic heft and expertise that the EU brings to the Indo-Pacific and can promote

economic development, infrastructure connectivity, and digital transformation.

Even as the EU's consensus on India's rise seems decisive,³⁵ however, that may not necessarily result in any credible India-EU partnership outcomes. In other words, political momentum between India and the EU will gain ground, but economic ties may not achieve their real potential. The progress, or lack thereof, of the EU-India Trade and Technology Council can provide a peek into this dynamic. Notwithstanding the hindrances, a positive graph of their relationship will likely emerge; however, this upturn in their bilateral will be more contextual and based on shared interests and goals rather than shared values. How rewarding it turns out to be, for both sides, remains to be seen. Sustained political engagement, sharp diplomatic nexus, and consensus-based negotiations between the EU and India on trade and economic matters will be critical to their future trajectory.

The geopolitical landscape necessitates strategic partnerships that leverage mutual strengths. One such model partnership is that between India and Sweden built over 75 years, based on common values, strong business, R&D and investment linkages, and approaches towards global challenges. Sweden's strategic decision to join NATO underscores Sweden's commitment to regional security and its alignment with broader Western defense strategies. The EU-India strategic dialogue could take a page or two from the India-Swedish model of diplomatic relations, which is continuously evolving to meet new requirements while keeping the big picture in mind.

For India, engaging with Sweden provides an opportunity to collaborate on security and defense matters with a NATO member, thereby bolstering India's own strategic interests in the region. As a member of NATO, Sweden can also facilitate defense and security dialogues between India and other Nordic and EU countries, promoting collaborative

efforts in these critical areas. Sweden's expertise in nuclear, defense, technology, and space sectors further strengthens its role as a critical mediator and bridge between India and EU countries. Sweden can act as a mediator in facilitating defense agreements, joint training programs, and collaborative research projects, thereby strengthening India's defense (and overall strategic) ties with the region.

As an emerging power, India offers significant opportunities for collaboration in various sectors. Its firm stance on China and its strategic partnership with Western nations enhance its appeal as a reliable ally. Delhi's unique approach to Russia, coupled with its leadership role in the Global South, makes it a distinct power in Asia. This relationship offers EU member countries valuable insights into understanding and managing relations with Russia.

The Bottom Line for 2025 and Ahead

In short, EU-NATO resilience will be tested at a time when Trump's pressure on burden-sharing of defense expenditure and a fast settlement of a peace plan for the Ukraine war will gain steam. Naturally, concerns like geopolitical aims in the Indo-Pacific for countering China or for developmental purposes will face scrutiny primarily due to Europe's financial constraints. As a result, economic ties with China—the EU's top trading partner as well as its systemic rival—and in turn geopolitical ties, will need to be managed with greater rigor. The steady trajectory of India's booming economy should bring benefits to the EU in the long term, the sluggish progress on the free trade agreement (FTA) notwithstanding.³⁶

The 'new India' emerging has population growth and fast urbanization as low-hanging fruits. India tops the global growth rankings in IMF's World Economic Outlook 2023.³⁷ Additionally, it is one of the 10 countries globally that have, over the last three decades up to the pandemic, achieved average annual prosperity growth above 3 percent while never falling below 2 percent CAGR for any

five-year period. Therefore, its future trajectory will significantly impact the EU's ability to achieve its global economic, political, and climate change negotiated ambitions. The EU, hence, has a stake in India's success in negotiating geo-political tension and global economic imbalances in the future. The approach towards India has to go beyond the narrow view of short-term benefits and instead look at opportunities to enable and engage with the development path that India has adopted.

However, with both the far-right footprint and political instability on the rise, as well as a new EU Commission in place, the year 2025 will be undoubtedly challenging for Europe. The imperative would be to focus on issues such as managing inflation, price rise, unemployment, economic slowdown, migration, and energy crisis while battling security concerns. For the EU to come out on top, it must not only prioritize controlling the domestic chaos, including fragmentation, but the bloc should also not shy away from assuaging Trump through personal diplomacy, a style that he certainly favors.

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