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POLICY ANALYSIS OPEN ACCESS

Navigating the Indo-Pacific: The EU's 2025 Council Conclusions Amidst Geopolitical Uncertainty

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ABSTRACT

More than four years after the EU released its Indo-Pacific Strategy (in April 2021), the Council of the EU provided fresh 'Conclusions' (in October 2025) stating that the EU should 'further intensify its strategic focus, presence, visibility and actions in the Indo-Pacific'. These conclusions were issued against a dramatically altered geopolitical backdrop, including the onset of the Russia–Ukraine War, worsening Sino-American relations and the advent of Trump 2.0. This article assesses the 2025 Council Conclusions against empirical findings from more than 100 semi-structured interviews across eight Indo-Pacific locations: Australia, China, India, Japan, New Zealand, South Korea, Taiwan and Thailand. While the Conclusions feature harder security language and an elevated economic security agenda, the empirical data reveals a persistent gap between EU ambitions and Indo-Pacific elite perceptions. The article concludes that the 2025 Council Conclusions represent a modest, incremental response to the changing geopolitics of the Indo-Pacific, but prevailing issues around the EU's global actorness mean it will continue to fall short in its efforts to assert geopolitical relevance.

When the European Union (EU) released its 'EU Strategy for Cooperation in the Indo-Pacific' (henceforth: IPS) in April 2021, the perceived geopolitical situation from Brussels was one of cautious optimism. Although the idea that the post–Cold War 'liberal international order' was on its last legs had intensified (Lesch et al. 2024), especially after COVID-19 (Smith and Fallon 2020), there remained a strong belief in Brussels that cooperation and positive-sum outcomes were achievable in the Indo-Pacific region. Indeed, the EU's IPS emphasised being 'pragmatic, flexible and multifaceted, allowing the EU to adapt and build its cooperation according to specific policy areas where partners can find common ground based on shared principles, values or mutual interest' (European External Action Service 2021). While 'intense geopolitical competition' and 'increasing tensions' were flagged as concerns, the Strategy still envisaged concluding a 'Comprehensive Agreement on Investment with China' (European External Action Service 2021), as

opposed to the Indo-Pacific Strategy of the United States which was far more pessimistic on China (The White House 2022). For the EU, its IPS represented an opportunity to articulate a coherent role for itself in a geopolitical space of rapidly growing strategic and economic significance. Notably, the Indo-Pacific accounts for roughly 25% of total EU exports and 37% of total imports (EUROSTAT 2024). The IPS was also an expression of the EU's broader ambition to become 'a stronger Europe in the world' and to assert itself as a geopolitical actor commensurate with its economic, regulatory and normative weight (European Commission 2019).

Much has changed since the EU's IPS was released. Russia's full-scale invasion of Ukraine in February 2022 naturally forced an inward pivot of EU resources and political attention, given the proximity of the conflict to the EU and the growing fear of Russia's long-term plans (Ünaldilar et al. 2026). Indeed,

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the onset of the Russia-Ukraine war scuppered the envisaged momentum of the French Presidency of the Council (January to June 2022), which had been intended to highlight the Indo-Pacific and, in particular, France as the 'go-between of Indo-Pacific and European countries' (Reuters 2021). While the Indo-Pacific remains a core EU foreign policy aim, as evident in the regular forums that are held (European External Action Service 2025) as well as a general increase in actorness (Grgić and Tercovich 2025; Abbondanza and Grgić 2025), the Russia problem has not gone away (Fix 2026). In fact, the geopolitical situation for the EU has only become more complex and challenging, particularly with Donald Trump's return to the White House in January 2025 (Jones 2025; Matthijs and Tocci 2026). Trump 2.0 fundamentally disrupted the trans-Atlantic alliance architecture and cast serious doubt over the reliability of the United States as the linchpin of both European and Indo-Pacific security orders (Aydıntaşbaş and Herrmann 2026). The deployment of thousands of North Korean troops to fight alongside Russian forces and the reported provision of Chinese advisors and materiel to Moscow have further deepened the security interdependence between the Indo-Pacific and Europe (Abbondanza and Grgić 2025). Meanwhile, tensions in the South and East China Seas and across the Taiwan Strait continue to intensify (Simpson 2025; Xiangfeng 2025). Ultimately, the Indo-Pacific in 2026 is a considerably more challenging and contested space than the one the EU sought to engage with when it launched its IPS (Kurlantzick 2026; Reyes 2026).

It is against this transforming geopolitical backdrop that the findings of the European Union in the Indo-Pacific (EUIP) Jean Monnet Network project take on particular significance. Over four years, the EUIP Network—comprising 27 partner universities and more than 40 scholars—conducted 111 semi-structured interviews with foreign policy decision-makers and influencers across eight Indo-Pacific locations: Australia, China, India, Japan, New Zealand, South Korea, Taiwan and Thailand. These findings, detailed in this special issue, reveal a fundamental tension at the heart of the EU's Indo-Pacific ambitions. On the one hand, the EU is positively viewed in all examined locations and maintains strong bilateral relationships across the region, with genuine credibility in climate action, economic engagement and digital governance. However, its perceived ineffectiveness as a strategic actor is pervasive. Plainly put, the EU is not regarded as credible in the realm of security and defence—the dominant concern in a heavily securitised Indo-Pacific (Smith and Bacon 2025)—and very few key informants across all eight locations were even aware that the EU had an IPS.

In October 2025, the Council of the EU (Council) responded by approving new conclusions on IPS implementation (Council of the EU 2025). These conclusions reaffirm the EU's commitment to the Indo-Pacific while signalling an evolution in priorities and tone, foregrounding three core areas: security and defence challenges, the green and digital transition, and trade and economic security. The document is notable for its harder security language, more explicit linkage of European and Indo-Pacific security, and renewed emphasis on economic security and supply chain resilience. Simultaneously, it largely preserves the broad, multi-issue architecture of the 2021 IPS, opting for an evolutionary rather than revolutionary path (Smith and Holland 2026).

Yet, the deeper question that motivated the EUIP Network's research remains as pressing as ever: what is the most appropriate role for the EU in the Indo-Pacific? Do the 2025 Council conclusions represent a meaningful response to the gaps identified in the research? Or do they reflect a continuation of the strategic ambiguity and overextension that have limited EU engagement since 2021? How does the radically altered external environment—shaped above all by Trump's second term, the deepening United States–China rivalry and the Russia–Ukraine war's Indo-Pacific dimensions—complicate the EU's efforts to carve out a valued role? This study addresses these questions in three sections. Section 1 provides a systematic analysis of the 2025 Council Conclusions, examining what has changed since 2021 and where ambitions remain unfulfilled. Section 2 situates the conclusions against the EUIP Network data, exploring how the stated priorities align with or diverge from the expectations of foreign policy elites across the four sub-regions studied. Section 3 examines the internal and external situational factors that shape the feasibility of EU engagement, including Member State coherence and the strategic implications of Trump 2.0.

1 | Overviewing the 2025 Council Conclusions

The Council Conclusions adopted on 20 October 2025 constitute the most significant formal statement of EU Indo-Pacific policy since the 2021 IPS was released. Framed as an implementation review rather than a new strategy, the document is deliberately evolutionary in character. The Council 'reaffirms that the EU Strategy for Cooperation in the Indo-Pacific continues to provide a sound framework for EU engagement' (Council of the EU 2025), signalling continuity of purpose even as it acknowledges the significantly altered strategic environment. Nevertheless, read closely and against the backdrop of both the 2021 IPS and the EUIP Network's empirical findings, the 2025 conclusions reveal important shifts in emphasis, priorities and tone.

The most immediately striking feature is the hardening of the security language. Whereas the 2021 strategy presented security and defence as one of seven broadly coequal priority areas, the 2025 conclusions elevated it to one of three core areas of engagement. The document explicitly states that 'the security of the Indo-Pacific and of Europe are more interlinked than ever' (Council of the EU 2025), reflecting a strategic reappraisal driven by events since 2022. Particularly notable is the explicit naming of the Russia–Ukraine–North Korea nexus as a shared security concern spanning both theatres. By naming North Korea alongside Russia, the conclusions signal a more direct engagement with the threat perceptions of Japan and Taiwan—the two locations where, as the EUIP Network found, the EU was most positively regarded as having a potential security role. The conclusions also devote considerable attention to maritime security, highlighting Operations ATALANTA and ASPIDES, the CRIMARIO, ESIWA+ and GPS programmes, and Security and Defence Partnerships with Japan and South Korea. Tensions in the South and East China Seas and across the Taiwan Strait are named directly, with the Council reiterating its 'opposition to any unilateral attempts to change the status quo by force or coercion' (Council of the EU 2025). A further novel feature is the attention given to the shadow fleet

challenge—vessels violating international maritime rules in support of Russian sanctions evasion—which has emerged as a growing security concern with resonance across both theatres (Vassort 2026).

The second major shift is the elevation of economic security in the region. Trade and economic security is designated as a core area of engagement alongside security and the green and digital transition, and the document repeatedly returns to themes of supply chain resilience, open and fair trade and connectivity. This reflects a broader trend in EU foreign policy towards what might be termed ‘geo-economisation’—the growing deployment of economic instruments for strategic purposes and the parallel recognition that economic dependencies themselves constitute security vulnerabilities (Herranz-Surrallés et al. 2024). The Global Gateway, which was absent in the 2021 IPS due to it being announced later in 2021, features prominently as the EU’s primary vehicle for translating this agenda into tangible engagement, described as playing ‘an essential role in boosting smart, clean and secure connections’ in partnership with the European Investment Bank, Member States’ development finance institutions and the private sector (Council of the EU 2025). This is an attempt to address a clear weakness identified by the EUIP Network: that the relationship between the Global Gateway and the IPS was poorly understood by Indo-Pacific interlocutors and that its tangible impact had been limited (Bohne 2024). A further notable development is the explicit reference to cooperating with the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP)—a significant departure given that the 2021 IPS made no mention of it and one that reflects the growing discussion about the EU’s potential role in shoring up rules-based multilateral trade architecture (Arrieta et al. 2025). The conclusions also catalogue ongoing FTA negotiations with India, Thailand, the Philippines, Malaysia, Australia and the UAE, alongside progress on Digital Partnerships, representing, in aggregate, a substantial economic engagement agenda.

For all its harder edges, however, the 2025 Conclusions ultimately continue the balancing act that has defined EU Indo-Pacific engagement from the outset, and nowhere is this more apparent than in the treatment of China in the document. The Conclusions are inclusive in their language, affirming that the EU’s ‘commitment to the region is inclusive of all partners wishing to cooperate with the EU’ (Council of the EU 2025). China is not named as an adversary, and the document does not adopt the confrontational framing of other national Indo-Pacific strategies. The EU’s three-pronged characterisation of China as simultaneously partner, competitor and systemic rival—the cornerstone of EU–China policy since 2019 (Li and He 2022)—remains the underlying framework, even as the conclusions name the Taiwan Strait and the South and East China Seas as sources of destabilising tension. However, the language of partnerships rather than alliances, and engagement rather than containment, continues to run through the 2025 Council conclusions (Messingschlager 2025). This reflects the EU’s continued (and arguably emboldened) desire to remain distinctive from the United States and avoid being forced into a zero-sum alignment choice that might materially hurt its interests in the Indo-Pacific while also hindering its bilateral relationships with numerous Indo-Pacific locations that want to avoid an alignment choice (Tunsjø 2025; Bechev 2026; Smith and Christoforou 2026).

This positioning carries both strategic logic and risks. As the EUIP Network data demonstrated, several Indo-Pacific actors—particularly in Southeast Asia and India—value precisely this quality in the EU: the sense that it is not simply an extension of the United States’ strategic logic and that it offers a degree of autonomy from the pressures of great power competition. At the same time, the continued ambiguity surrounding China risks rendering the IPS incoherent or irrelevant to Indo-Pacific partners—principally Japan and Taiwan—for whom hard security and clear strategic alignments are overriding concerns. The 2025 conclusions have not resolved this tension; they have mostly updated the framing in response to more pressing issues.

2 | The 2025 Conclusions in the Context of the EUIP Network Data

As pointed out in the overarching article of this special issue (Smith and Holland 2026), the underpinning heterogeneity of the Indo-Pacific naturally makes having an IPS that caters to everyone extremely challenging. This heterogeneity is twofold. On the one hand, there is significant diversity in how the examined Indo-Pacific locations view the EU, both as a bilateral partner and as a broader regional player. On the other hand, there is significant diversity in how Indo-Pacific locations view their regional security settings (there is no universal understanding of the Indo-Pacific). In China’s case, it flatly rejects the term Indo-Pacific, calling it a product of ‘cold war mentalities’ (Smith and Fallon 2024). Furthermore, there is a Global North versus Global South divide in the Indo-Pacific, with the Indo-Pacific concept often viewed as a Western construct in the Global South (Smith and Bacon 2025). It is nearly impossible for the EU (and other actors for that matter) to capture the complexity of the Indo-Pacific in a single strategic document. However, the 2025 Conclusions represent a continuation of this effort, and while this will do little to alleviate the aforementioned issues encountered so far, it is worth assessing how the 2025 Conclusions relate to the research undertaken in each of the eight focal locations: Australia, China, India, Japan, New Zealand, South Korea, Taiwan and Thailand.¹

Australian perspectives on the EU in the Indo-Pacific are defined above all by a visibility deficit and cautious scepticism, even among senior and well-connected elites. The EUIP research found that interviewees rated the United States and China three times more important than the EU in the Indo-Pacific, with awareness of the IPS remaining remarkably thin. The EU’s institutional complexity and coordination challenges were universally cited as limiting factors, and a gap between EU rhetoric and actionable resources emerged as near-consensus. Some perceived the EU as protectionist or inward-looking despite its global role. In terms of cooperation priorities, the green transition ranked first, followed by trade and economic engagement, with security a distant third. The 2025 conclusions partially address this picture: the CPTPP reference is directly relevant to Australia as a founding member, and the foregrounding of the green and digital transitions aligns closely with the cooperation priorities interviewees identified. The recently concluded EU–Australia FTA and Security and Defence Partnership (though post-dating the conclusions) further signal a meaningful upgrade in ambition. The deeper challenge remains visibility:

Australia's commitments through AUKUS and the Quad provide clear alternative regional frameworks, and until the EU translates its Indo-Pacific ambitions into a more consistent and concrete presence, even sympathetic partners will continue to underestimate what the relationship can offer.

China presents the most complex and arguably consequential case for assessing the 2025 Council conclusions. The EUIP research found that Chinese foreign policy decision-makers and influencers hold a notably bifurcated view of the EU: highly regarded as a normative and economic power but viewed with considerable suspicion as an Indo-Pacific actor. More than half of the Chinese key informants assessed the IPS negatively, with the Strategy's references to Taiwan, its perceived alignment with the United States' strategic outlook, and its securitised framing of regional issues identified as the primary sources of friction. Green transition and sustainability were the only domains in which meaningful EU–China cooperation was seen as genuinely plausible. Against this backdrop, the 2025 conclusions offer limited reassurance to Beijing, despite EU–China relations experiencing something of a thaw due to Trump 2.0 (Messingschlager 2025). The inclusive language affirming engagement with 'all partners' provides some diplomatic cover, and the continued prominence of climate action preserves at least one credible avenue for bilateral cooperation. However, the explicit naming of the Taiwan Strait as a source of destabilising tension, references to the Russia–Ukraine–DPRK nexus (uncomfortable for Beijing given China's support for Moscow) and the new emphasis on CPTPP engagement, from which China is excluded, will do little to soften China's perception that the IPS remains, at its core, a vehicle for EU alignment with the United States-led Indo-Pacific order.

India produced the most sceptical assessment of the EU's Indo-Pacific significance in the entire EUIP dataset, with key informants rating the EU's importance to the Indo-Pacific at just 2.83 out of 5, the lowest of all eight locations. The data revealed three core criticisms: the EU's approach is too predominantly economic; its strategic ambiguity on China undermines credibility; and its normative standards, while valued in principle, sit in uncomfortable tension with the developmental pragmatism of many Indo-Pacific nations. Green transition, connectivity and sustainability were the priority areas seen as most relevant to India–EU cooperation, while security and defence ranked a distant fifth. The 2025 conclusions offer some genuine movement on the security deficit that Indian respondents identified: the harder language on maritime security, the CRIMARIO and ESIWA+ programmes, and the push for further Security and Defence Partnerships all point in a direction Indian officials have been asking for. Although the Council's conclusions do not mention it, the conclusion of the EU–India FTA negotiations in early 2026 is also a positive step. However, a deeper issue emerges in the Indian data. The EU's tendency to appear strategically ambiguous precisely where Indo-Pacific partners need clarity is a criticism that the 2025 conclusions address only partially. The inclusive language on China will do little to dispel Indian perceptions that the EU lacks the strategic resolve to be a serious security partner in the region.

Japan can be characterised as the biggest winner in terms of the shift in language and focus contained in the 2025 Council

conclusions. Japanese respondents had pushed for greater engagement on maritime security and economic security, both of which are now heavily foregrounded. The conclusions reiterate opposition to 'any unilateral attempts to change the status quo by force or coercion' (language absent from the 2021 IPS but familiar from EU–Japan summit statements), while the reference to 'shadow fleet vessels posing possible risks to critical maritime infrastructure' directly reflects Japanese security concerns, given the 2023 Memorandum of Cooperation on Submarine Cables. On economic security, nearly all Japanese respondents criticised the near-total absence of this theme from the original IPS; the 2025 conclusions now identify it as a headline priority, with concrete expression in initiatives such as the July 2025 Competitiveness Alliance and the 2023 Memorandum of Cooperation on Semiconductors. In both domains, core Japanese preferences are far more comprehensively represented in the 2025 conclusions than they were in the original IPS.

New Zealand produced one of the most instructive cases in the EUIP dataset because the relationship is, on the surface, so natural. The data show that, in the eyes of New Zealand, the EU is seen as a like-minded partner committed to the rules-based order, and Prime Minister Luxon's 2025 use of the word 'friendship' to describe the relationship marks a notable step. Yet, awareness of the IPS itself was remarkably thin, even among well-informed elites. Ocean governance and green transition topped the cooperation rankings, reflecting New Zealand's trade dependence on open sea lanes and its environmental commitments. Security and defence ranked last, with one official questioning whether the EU had a mandate in that area. Although the 2025 conclusions speak more to the security and defence dimensions that New Zealand respondents were sceptical about, it perhaps activates the 'potential' component of those perceptions, which held that the EU could be a relevant geopolitical actor if it improved its capabilities. Additionally, explicit attention to CPTPP cooperation is directly relevant to New Zealand, a founding member, and could serve as a concrete, practical entry point that respondents found conspicuously absent in the 2021 IPS. However, the deeper challenge is visibility: until the EU communicates its Indo-Pacific ambitions in plainer terms and makes the connection to New Zealand's own Pacific priorities, even sympathetic partners will continue to underestimate what the relationship can offer.

South Korea emerges from the EUIP research as one of the EU's most natural Indo-Pacific partners. The data revealed a strong convergence between the two actors' Indo-Pacific strategies, with digital governance, green transition and sustainability ranked as the most promising areas of cooperation, a finding underscored by the fact that digital governance received a perfect score of 10 in the broader EUIP dataset, reflecting South Korea's self-identification as a leading digital middle power. The IPS was viewed cautiously but positively, with 29% of respondents seeing it as potentially transformative. The 2025 conclusions respond well to several findings. The explicit recall of the Security and Defence Partnership concluded in November 2024, the desire for further such partnerships, and the direct naming of North Korea as a security concern will resonate strongly in Seoul, where North Korea remains the primary driver of threat perception. The foregrounding of digital governance and the green transition as

core areas likewise aligns closely with where South Korean key informants see the greatest potential for cooperation. The main caveat concerns South Korea's domestic political shift following President Yoon's impeachment. President Lee's more pragmatic, China-accommodating foreign policy orientation may cool some of the values-driven enthusiasm for EU partnership that characterised the Yoon era, introducing a degree of uncertainty that the 2025 conclusions, for all their ambition, cannot resolve (Choi 2026).

Taiwan produced the most striking contrast in the entire dataset: while Chinese elites rated the EU's importance to the Indo-Pacific at just 3.1 out of 5, Taiwanese respondents gave it 4.1, the highest score across all eight locations. This reflects not simply a positive bilateral disposition but a strategic logic: for Taiwan, a more engaged EU represents diversification away from sole dependence on the United States at a moment of acute geopolitical vulnerability (Huang 2025). Green transition ranked first among cooperation priorities, with sustainability second and, notably, security and defence ranking third, a result that sets Taiwan apart sharply from other locations, except Japan. The 2025 conclusions speak directly to Taiwanese concerns in ways that the 2021 IPS did not. The explicit naming of the Taiwan Strait as a source of destabilising tension and the Council's reiteration of its opposition to unilateral attempts to change the status quo by force represent a meaningful hardening of language that Taipei will welcome. At the same time, Taiwanese officials were candid about the EU's limitations, criticising Brussels for excessive caution in deepening trade and political ties and pointing to internal coordination challenges as a constraint on decisive action. The 2025 conclusions' inclusive, China-accommodating framing will not fully allay these concerns, however. For Taiwan, the EU's value as a partner ultimately depends on whether symbolic solidarity can be translated into substantive economic and political engagement, and on that test, the conclusions remain ambiguous.

Thailand presents the clearest illustration of what the EU's natural Indo-Pacific niche looks like when it is functioning well. The EUIP data demonstrated a notably positive overall assessment: the EU's IPS as having either a slightly positive impact or an upgrade effect by all 13 respondents, with none indicating negative outcomes. Furthermore, the EU's importance to Thailand bilaterally (3.88) was meaningfully higher than its importance to the Indo-Pacific (3.69). Sustainable and inclusive prosperity and the green transition topped the priority area rankings, closely mirroring Thailand's own Bio-Circular-Green Economy Model (Meiksin 2020), whereas digital governance and connectivity were identified as domains of growing potential. Security and defence, predictably, ranked the lowest. The 2025 conclusions are a reasonable fit for this picture in some respects: the continued prominence of the green and digital transitions, the Global Gateway's role in connectivity and the positive FTA negotiations with Thailand's ASEAN neighbours, Indonesia, Malaysia and the Philippines, give hope for a fast-tracking of the EU–Thailand FTA, which was stalled in 2014 due to the military coup. However, the harder security language of the conclusions and the explicit Russia–Ukraine–North Korea framing risk cutting against the grain of Thai and broader Southeast Asian preferences. The Thailand data is explicit on this point: respondents considered the EU's tendency to link European security

anxieties to Indo-Pacific scenarios counterproductive in a regional context that values inclusivity and avoids bloc logic.

3 | Internal and External Windows and Hurdles to an Effective EU in the Indo-Pacific

If the EU is to fulfil its desire to become a prominent player in the Indo-Pacific, as evident by its original 2021 IPS and its more recent Council conclusions, it must not only listen to its Indo-Pacific partners, as argued in the overarching article of this special issue (Smith and Holland 2026), but also traverse a number of internal and external hurdles while also maximising windows of opportunities.

3.1 | The Internal Situation

There is a rich body of literature that examines the internal challenges the EU faces when pursuing foreign policy (Hill 1993; Toje 2008; Thomas 2012). While states must navigate two-level games when formulating foreign policy, for the EU, it is more akin to a three- or even a four-level game, given that it is not a state but rather a convoluted *sui generis* actor that is partly intergovernmental and partly supranational (Schakel and Tatham 2025). Furthermore, unlike foreign trade policy, where the EU has exclusive competency, foreign policy remains a product of a complex bargaining process involving member states and EU institutions (Smith 2016). The EU struggles to find consensus among its Member States on most international issues given the diversity of national interests across the 27. Even in relation to the Russia–Ukraine war, which is an obvious security concern for the EU and EU Member States, some—especially Hungary (Özoflu and Arató 2023) but also Slovakia (Batka and Koníková 2026)—have represented dissenting voices that slow (or even alter) the EU's response.

Unsurprisingly, the Indo-Pacific is an issue area where significant national divergence occurs within the EU. For some, especially those who have released Indo-Pacific strategies, the Indo-Pacific is viewed as a crucial geopolitical space. For others, it is not deemed important. In a 2021 survey conducted by the European Council on Foreign Relations, the results demonstrated that 'despite strong support from France, Germany, and the Netherlands (...) many member states [especially Croatia, Estonia, Greece, Hungary, and Malta] are still largely uninterested in events there' (Grare and Reuter 2021). Member State positions with respect to the two poles of the Indo-Pacific, the United States and China, are also important factors in how they are likely to view the Indo-Pacific. Regarding the United States, while the trans-Atlantic relationship has long been an indelible aspect of European security, there are divergences among Member States, ranging from Central and Eastern European states (especially Poland), which have significant security dependence on the United States, to Germany's balancing act (between the United States and China) to France's insistence on strategic autonomy (Shapiro and Pardijis 2017). Regarding China, beyond Hungary, which is the most pro-China, some EU Member States (especially Germany and, to a lesser extent, Italy and France) pursue a pragmatic approach to China, while others are much more cautious (or even outspoken, as in the case of

Lithuania) (Godement and Vasselier 2017). Although the United States remains the premier security partner, China's growth in importance as a trading partner is hard to ignore, especially as it recently became Germany's most important trading partner, surpassing the United States (O'Carroll 2026).

Beyond the issue of internal consensus and interest alignment, the EU's effectiveness in the Indo-Pacific also hinges on the convergence and complementarity between its own IPS and that of its Member States that also have individual IPSs, especially France. The EU has been cognisant of this challenge as its 2021 IPS was not so much a top-down initiative as a bottom-up aggregation, drawing heavily from France, the Netherlands and Germany (van Willigen and Blarel 2024). However, a side effect of this was that it made the EU's IPS ambiguous in its aims and lacking a coherent collective vision (Abbondanza and Wilkins 2024; van Willigen and Blarel 2024). Abbondanza and Grgić (2025) map 10 country case studies and identify a 'messy middle' scenario as the most likely trajectory for European regional engagement—continued but fragmented and non-coherent—a verdict that sits uneasily alongside the ambitions of the 2025 Conclusions. Additionally, France's approach, with its emphasis on hard power and naval presence, sits uneasily alongside the EU's IPS. As Pugliese (2024, 19) notes, Member States have demonstrated a preference for 'flying the national flag' over EU-branded engagement, suggesting that intra-EU competitive dynamics undermine the potential for a common EU effort. Many EUIP respondents identified this as an issue, with some seeing Member States as more credible geopolitical partners. Four years after the launch of the EU's IPS, there is little evidence that this situation has changed, with the EU continuing to be 'predominantly reactive, still developing' while Member State strategies continue to set the pace (Abbondanza and Wilkins 2024). The EU desperately needs to find Indo-Pacific coherence (along with greater capabilities); otherwise, it will continue to suffer from 'cheap talk' (van Willigen and Blarel 2024).

The potential for greater foreign policy capabilities in the Indo-Pacific should not be dismissed as fantasy, as it ties into a crucial debate in the EU at the moment, which provides a window of opportunity: the desire for greater strategic autonomy. This is not a new debate (Aggestam and Hyde-Price 2019; Howorth 2019), but Russia's invasion of Ukraine in 2022 gave it renewed urgency, and the return of Donald Trump as President of the United States has transformed strategic autonomy from aspiration into an imperative (Varma 2024; Jones 2025). President of the European Commission Ursula Von der Leyen's February 2026 Munich Security Conference speech marked a qualitative shift: 'independence' (a term deliberately avoided in every prior Council document) was now framed as a security doctrine, complete with proposals to activate the mutual defence clause (Article 42(7)), introduce qualified majority voting on security and reintegrate the UK into European defence architecture (Brender 2026). The strategic autonomy push is also backed by France and Germany and has garnered significant internal support. However, the question remains as to whether the Indo-Pacific is included in this brewing push for strategic autonomy. At this stage, most of the strategic autonomy debate focuses on shoring up security on the European continent rather than developing greater capabilities to act on a global scale (Bechev 2026).

However, the EU's proactiveness in the Indo-Pacific, including signing a Security and Defence Partnership with India in early 2026 (European External Action Service 2026) and exploring greater engagement with the CPTPP (Lanktree et al. 2026), suggests that in Brussels, at least, the Indo-Pacific is seen as an important component of gaining greater strategic autonomy.

3.2 | The External Situation

While the EU faces significant internal hurdles in pursuing its Indo-Pacific ambitions, it must navigate a rapidly shifting external landscape. The Indo-Pacific, rather than a natural region, is better understood as a construct (principally led by the United States, Australia, Japan and India) premised on the existential threat of China's rise to the putative rules-based international order (Smith and Bacon 2025). Despite the EU's attempts, unlike the United States and others, in its 2021 IPS and 2025 Council conclusions to engage China rather than existentialise it, EUIP data from China reveal a widespread perception that the EU is joining an anti-China crusade, reflecting clumsy strategic communications. ASEAN's approach of neither fully accepting nor rejecting the dominant Indo-Pacific narrative, but insisting on its own centrality as a strategic entrepreneur, may offer a useful template for the EU's envisaged multivector approach (Kuik 2022; Smith and Bacon 2025). This template has become more relevant in the Trump 2.0 era, in which the United States has substantially deemphasised the Indo-Pacific construct. Trump's treatment of close allies, combined with apparent US disengagement, most strikingly illustrated by his response of 'What does that mean?' when questioned about AUKUS (Vyas 2025), has left Indo-Pacific actors questioning whether the United States remains a reliable anchor for balancing against China. This has forced some countries to consider rapprochement with Beijing, such as India signalling a return to pre-2020 Sino-Indian 'normalcy' and South Korea proactively re-engaging China (Chhaya 2025; Kim 2025). For many, balancing China by aligning with Washington has lost its appeal. The EU, with its historical record of pragmatic engagement and renewed efforts to re-engage Beijing, is well positioned to serve as a stabilising diplomatic interlocutor with China in the Indo-Pacific.

However, the EU's ability to adapt to the changing geopolitical situation in the Indo-Pacific rests on its ability to convince Indo-Pacific locations of its credibility as a geopolitical player. The EUIP Network data revealed that geopolitical actorness was the EU's most significant and consistent weakness across all eight examined locations (Smith and Holland 2026). This stems primarily from its limited capacity in the area of security and defence, the dominant currency of Indo-Pacific geopolitics. With the partial exceptions of Japan and Taiwan, Indo-Pacific foreign policy elites simply cannot conceive of the EU as a strategic player, continuing to view it instead as a 'civilian' power effective only in areas of 'low politics' (economic policy, climate action, digital governance) rather than the hard security matters that preoccupy the region. As mentioned earlier, this perception is compounded by a structural paradox: while individual EU Member States, most notably France, but also Germany, the Netherlands and Italy (Abbondanza and Wilkins 2024), have made the Indo-Pacific a cornerstone of their national foreign policies and conducted meaningful military deployments in

the region, this credible European military presence remains largely disconnected from EU-level strategic coordination. The result is that the EU continues to suffer from a capabilities–expectations gap (Hill 1993; Lai et al. 2026). To add insult to injury, NATO has arguably had more success inserting itself into the high geopolitics of the Indo-Pacific, notably with the creation of the Indo-Pacific 4 group (comprising Australia, Japan, New Zealand and South Korea) that participates in annual NATO Summits (Grgić 2024).

The naval dimension of European engagement in the Indo-Pacific deserves particular emphasis in this respect. France's regular Freedom of Navigation operations in the South China Sea, combined with coordinated UK, German, Dutch and Italian naval deployments since 2021, represent a more tangible European security presence in the region than EU-level frameworks suggest (Abbondanza and Grgić 2025). Harnessing and better coordinating this Member State naval activity under an EU strategic umbrella remains one of the most actionable steps Brussels could take to close the credibility gap. Equally significant is the growing role of minilaterals—such as AUKUS, the Quad and the Indo-Pacific 4—as the dominant architecture of Indo-Pacific security governance. These groupings have acquired a momentum and legitimacy that the EU has been unable to match at the multilateral level, and the challenge for Brussels is whether it can position itself as a complementary partner to these frameworks rather than a competitor or bystander.

One window of opportunity for the EU to make a larger impact in the Indo-Pacific is through technology. The Indo-Pacific is increasingly defined not only by hard geopolitical tensions but also by technological competition between the United States and China, with states across the Indo-Pacific facing inextricable dependency on semiconductors, AI systems, 5G infrastructure and cloud computing produced overwhelmingly by these two 'technopoles' (Mayer and Lu 2025). This creates a structural dilemma for middle and smaller powers seeking to preserve their strategic autonomy (Smith and Christoforou 2026). It is precisely here that the EU offers something distinctive. While not a technopole in the conventional sense, the EU possesses significant and growing technological power (Csernaton 2022). The EU's General Data Protection Regulation (GDPR) has established a global data governance template that neither Washington nor Beijing can match (Cervi 2022), its 2023 European Chips Act mobilises over €43 billion to expand semiconductor production (Bouffaron and Blandin 2025), and ASML's near-monopoly on extreme ultraviolet lithography machines gives Europe some leverage in global chip supply chains (Gros 2026). Under Trump 2.0, the EU has moved decisively to deepen its Indo-Pacific tech presence, positioning European tech firms as explicit alternatives to American and Chinese providers (Bouffaron and Blandin 2025), and advancing digital trade partnerships with key regional partners such as Japan, Singapore and South Korea (Niestadt 2025). For Indo-Pacific states pursuing various forms of hedging or non-alignment, the EU emerges as a potentially enticing third-party technological partner, one that can offer supply chain diversification, trusted digital governance frameworks and high-tech cooperation without the coercive strings increasingly attached to both American and Chinese technological engagement (Smith and Christoforou 2026).

4 | Conclusion

Five years after the release of the EU's Indo-Pacific Strategy, the 2025 Council Conclusions represent a meaningful but ultimately incremental response to an increasingly volatile strategic environment. In foregrounding security and defence, economic security and the green and digital transition, and in hardening language on the Taiwan Strait, the Russia–Ukraine–DPRK nexus and supply chain resilience, Brussels has demonstrated an awareness of its shortcomings. This path is more evolutionary than revolutionary. Indeed, the EU's bilateral relationships across the Indo-Pacific remain a genuine asset, and its credibility in climate action, economic engagement and digital governance provides a solid foundation. However, as the EUIP Network data makes clear, the gap between EU ambitions and Indo-Pacific perceptions has not closed. Awareness of the IPS remains stubbornly low across all eight examined locations, security credibility remains elusive beyond Japan and Taiwan, and persistent strategic ambiguity on China continues to divide rather than unite regional partners. Internally, Member State divergence, competing national strategies and prioritisation of continental security over global reach continue to constrain what Brussels can credibly deliver. Externally, the Trump 2.0 disruption of the trans-Atlantic order has opened new diplomatic space for the EU, particularly as a pragmatic interlocutor with China, and intensified doubts about the reliability of the broader Indo-Pacific security architecture the EU sought to engage. Whether the EU can translate its undoubted potential into genuine strategic relevance will depend less on further documentation and more on whether it can align its self-conception with what the Indo-Pacific region actually needs from it while also taking the necessary internal steps to elevate its global actorness.

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Conflicts of Interest

The authors declare no conflicts of interest.

Data Availability Statement

Research data are not shared.

Endnotes

¹ For a more thorough examination of the focal locations, see the individual articles in this special issue.

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