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POLICY ANALYSIS OPEN ACCESS

The EU's Indo-Pacific Strategy: Perspectives From Australia

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ABSTRACT

This article examines perceptions in Australia of the European Union's Indo-Pacific Strategy, drawing on interviews conducted with government officials, experts and civil society actors. The EU is regarded positively as a friend and partner of Australia and equally committed to the maintenance of the rules-based international order. Conversely, the results of this research reveal a limited understanding of the EU's Indo-Pacific Strategy. They also reveal a persistent and limited understanding of the EU in its own right, distinct from the long-standing bilateral relations between Australia and the EU's Member States. The findings draw attention not only to the need for clearer, more targeted communications by the EU of its strategic intent in this region, but also to the need in Australia for better education about the EU and a more contemporary understanding among policymakers of the EU as a strategic actor. Ironically, the global disruption that has unfolded since 2022, accelerated by the second Trump Administration, has triggered new energy in the EU–Australia relationship. In March 2026, a trade agreement, a defence agreement and negotiations over Australia's association with the EU's research and innovation programmes have all marked a new and more purposeful phase in EU–Australia relations.

1 | Sampling Perspectives From Political Elites

This contribution presents an evaluation of the perception of the European Union's (EU's) Indo-Pacific Strategy (IPS) from the perspective of Australia. Consistent with the approach across the overall project, the research strategy is that of purposive, élite interviewing of two particular types of interviewees: government officials involved in national Australian policymaking; and civil society actors who contribute to policy development in Australia. A total of 10 semi-structured interviews were conducted between March and August 2024. The central findings of the research are as follows:

a. Knowledge of the EU and of its IPS was limited, despite the level of seniority and experience of most of the interviewees, and most notably among government interviewees;

b. There was general recognition of the EU as a global actor but a consistent view that the inherent complexity of the EU prevented it from achieving its goals as such an actor;

c. Little thought is given to how the Australia–EU partnership could develop further, particularly strategically;

d. It is possible to identify a difference in attitude to the overall Australia–EU relationship: government officials are more cautious, although overall positive, in their assessment of the relationship whereas academic views are more diverse, ranging from sceptical to enthusiastic perspectives on the overall Australia–EU relationship.

This article begins with a historical overview of the relationship between Australia and the EU, providing the context for the

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research conducted in this project. It includes an overview of the intellectual construct that is the 'Indo-Pacific'.

Interviewees were selected for their seniority and direct familiarity with EU and Indo-Pacific affairs. Each was assured anonymity, which accounts for the non-attributed manner in which their views are reported below: The absence of named sources reflects the ethical conditions of élite interviewing rather than an absence of underlying data. Transcripts were analysed thematically, and the preliminary findings were tested at a validation workshop (referred to below as the 'Sandpit') involving the EU Ambassador to Australia, the research team, international reviewers and local stakeholders. Quotations are identified throughout by respondent category rather than by name or number of interview.[1] Interviews were conducted before the conclusion of negotiations for an Australia–EU Free Trade Agreement (A-EU FTA); a Security and Defence Partnership (SDP); and the start of formal negotiations for Australia's association with the Horizon Europe programme, all of which were announced in March 2026. Respondents' comments, particularly on the then-suspended free trade negotiations, should be read in that light.

2 | Placing the EU–Australia Relationship and the IPS in Context

2.1 | The European Union and Australia

For more than 60 years, Australia and the EU have shared formal diplomatic relations. Despite challenges, the relationship has been an enduring one, anchored in a solid sense of shared values and a shared commitment to multilateralism and a rules-based international order (Benvenuti 2018). As geopolitical competition and repositioning have moved to the Indo-Pacific, the EU, notably through its IPS, has recognised the potential—and need—for greater and deeper cooperation with Australia. The research results presented in this article support the contention that the potential exists for Australia and the EU to work together to make a constructive contribution to Indo-Pacific peace and stability (Wilson et al. 2026).

Trade has dominated the EU–Australia relationship within the broader context of its shared history and values. With the accession of the United Kingdom to the EEC on 1 January 1973, however, tensions between Australia and the EEC increased. During the following quarter century, however, relations between Australia and the EU improved. This is due, partially, to the increase in regular political dialogues that accompanied the expansion of the relationship from economic negotiations to a broader political partnership. Engagement developed on multiple levels and there was greater interest from both sides in developing broader strategic frameworks for the relationship.

Such developments in the institutional mechanisms build on earlier instruments such as the Wine Agreement, negotiated between Australia and the EU in 1994 (updated and strengthened in 2008), the *Framework Agreement between the European Union and Australia* in 2017 (DFAT 2018) and the MOU on Critical Minerals in 2024 (DISR, n.d.). In 2026, the EU and Australia concluded negotiations for an A-EU FTA; a SDP; and began formal negotiations for Australia's association with the Horizon Europe programme.

The latter negotiations signal a broader shift in Australia–EU engagement moving beyond its traditional trade relationship, as is the Australia–EU SDP, a formal framework for cooperation on global security challenges including cyber and emerging technologies, critical minerals, hybrid threats, maritime security, space and defence industry. Although there is some debate about the extent to which Australia and the EU should develop closer ties in the area of defence, this strategic partnership reflects a shared recognition of the interconnectedness of Europe's and the Indo-Pacific's security. The MOU on Critical and Strategic Minerals establishes a framework for building secure, stable and ethical supply chains spanning the full value chain from extraction to recycling (Department of Industry, Science and Resources, n.d.; European Commission 2024; Rhodes and Baylis 2024; Roche 2024).

Since the Second World War, the United States has been the most significant security partner for both Australia and the EU. Under the second Trump Administration, however, it is proving to be less dependable, adopting an approach, as a global actor, that does not accept as binding the rules of the multilateral, rules-based order it was instrumental in creating. Accordingly, both Australia and the EU have adjusted their respective approaches to engagement with the United States, including developing stronger and deeper bilateral relations with other states and regional groupings, including with each other.

This new stage of closer engagement between the EU and Australia occurs at a point in history when geopolitical realignment behoves middle powers such as Australia and the EU Member States to strengthen their cooperation while maintaining constructive relations with both China and the United States. Australia and the EU are accustomed to navigating the challenges of engaging with a state that is, simultaneously, both a trade partner and a systemic rival. They are unaccustomed, however, to approaching relations with the United States in a similar way. Yet, this is precisely what is required. The second Trump Administration has exercised its power against all other states irrespective of any pre-existing special relationships or alliances. Subsequent administrations are unlikely to revert to the previous approach to relations with Australia and the EU of acknowledging the importance of the Trans-Atlantic Alliance and the special relationship with Australia.

Strengthening relations across a network of middle powers to offset the exposure to the risk posed by the arbitrary exercise of power recently demonstrated by the United States is a rational response in the current geopolitical climate. This logic was also evident in the interviews. Notwithstanding the new element of instability in its foreign policy, the US administration remains committed to the AUKUS defence pact, concluded in 2021 with Australia and the United Kingdom. It is unclear whether Australia–EU relations in the context of the SDP will move beyond the conclusion of the agreement itself. As the findings of this project identified, the area with the greatest potential for cooperation is the green transition, followed by trade and economic activity.

2.2 | The Indo-Pacific: Diverse Perspectives

The concept of the Indo-Pacific entered into official discourse in Australia through the 2013 Australian Defence White Paper.

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The initial framing, referring to the territory between India and north Asia, was subsequently extended in Australia's 2017 Foreign Policy White Paper, to encompass the Pacific islands and extend beyond the original limit in the middle of the Indian Ocean to the shores of the United States. The economic growth on the Asian continent, representing two thirds of global economic growth and 60% of global GDP, presents a 'centre of gravity' proximate to both the Indian and Pacific Oceans, necessitating analysis encompassing both regions. From an Australian perspective, the Indian Ocean is no longer a marginalised theatre of strategic competition, and analysis of the Pacific must incorporate the geopolitical transformation occurring to its west (Latham 2025).

The concept of the Indo-Pacific is also a response to China's growing influence in this region (see, e.g., Doyle and Rumley 2019; Medcalf 2020). Concerned about increasing US–China tensions and broader security developments in a region that is integral to its trade (see, e.g., D'Ambrogio 2021), the EU began shaping its own approach to the Indo-Pacific. With some EU Member States having long-standing historical ties to the region, the 2021 IPS built on established relationships as well as ongoing engagement in areas such as development cooperation, climate action, trade, disaster risk reduction and support for international law. Nonetheless, a stronger role in the region for the EU was predicated on tensions in the region easing. It was necessary for the EU both to preserve its relationship with the United States while also maintaining a level of independence in its approach to China.

For Australia, the term is primarily a strategic and geographical construct: a maritime super-region the stability of which bears directly on national security and is defined above all by the management of China's rising power (Lee 2023), a framing broadly shared with the United States' own 'free and open' formulation (U.S. Department of State 2019). For the EU, however, the Indo-Pacific is understood chiefly as a space of economic connectivity, supply-chain resilience and normative engagement, in which hard security is one concern among several rather than the organising principle. The two actors thus arrive at the same map with different questions: Canberra asks how the regional balance of power can be stabilised, whereas Brussels asks how its economic and value-based interests can be secured across an expanded geography. This asymmetry of framing—predominantly strategic for Australia (notwithstanding its economic dimension), predominantly economic and normative for the EU—helps to explain both the areas of convergence later identified by interviewees, notably trade and the green transition, and the persistent Australian scepticism about the EU's weight as a security actor in the region.

That scepticism was tied to the perception that the EU lacks the instruments to act as a single entity in the harder security domains:

> (...) why Europe is not mentioned specifically in the (...) Australian Defence Review (...) France and Germany are singled out but they're only mentioned as trailing partners after the Five Eyes, after AUKUS.
>
> (Former official)

Another interviewee located the difficulty in the division of competence rather than in EU pretension:

> (...) with the EU not having its own defence force. It's a bit more complicated when you're cooperating with EU initiatives (...) via member states individually, (...) that adds to the complexity on the EU side.
>
> (Government official)

The EU's Indo-Pacific engagement was initially driven by France, the first EU Member State to set out a clear 'Indo-Pacific' agenda. Germany and the Netherlands followed, drawing—in part—on their historical links to underline continued interest in the evolving geopolitics of Asia and the Pacific. France's strategy leveraged its unique position as an Indo-Pacific regional power, drawing on its extensive maritime territories and strong economic connections. It prioritised protecting its territorial integrity, including its Exclusive Economic Zones, and promoting the rules-based international order. The strategy centred on four key areas: strengthening security and defence partnerships, deepening economic and technological cooperation, supporting multilateralism and addressing climate change and biodiversity challenges (see Choong 2019).

Through this strategy, France sought to balance geopolitical competition with inclusiveness, encouraging cooperation with like-minded partners while contributing to regional stability. This approach is also evident in the EU's IPS which focuses on broader regional concerns, particularly climate action and the resilience of global value chains.

These origins give rise to a more sceptical question about the character of the EU's IPS: is it a genuine and autonomous strand of EU foreign policy, or largely the projection onto the Union as a whole of French national interest, itself rooted in a residual colonial and post-colonial presence in the region, sustained through France's overseas territories and Exclusive Economic Zones? The uneven character of the IPS' implementation lends weight to the latter reading. Beyond France, and to a lesser degree Germany and the Netherlands, few Member States possess either the maritime assets or the strategic incentive to sustain an Indo-Pacific posture, and the Strategy has accordingly been pursued intermittently and with modest resourcing rather than as a settled foreign policy priority. This reading of the IPS' uneven foundations is supported in the data and connected to the loss of the United Kingdom's regional reach:

> (...) outside of France, there isn't really any EU country that has a significant presence in the Pacific (...). that's where the loss of the UK gets felt a bit, in that kind of diplomatic influence in this region.
>
> (Academic)

This matters for Australia, because the EU's credibility as an Indo-Pacific partner turns on whether its engagement is structural or largely declaratory. The point was sharpened by the 2021 AUKUS announcement, which saw Australia abandon its submarine contract with France—the one Member State with a developed IPS—in favour of the United States and the United

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Kingdom. There is a particular irony in Australia turning, for the centrepiece of its regional defence posture, away from the EU Member State most invested in the Indo-Pacific and towards two Anglophone partners. The episode left a lasting residue in French and, by extension, EU–Australia relations (Biscop 2021; Perot 2021; Rudd 2021), exposing the gap between the EU's aspiration to strategic relevance in the region and its capacity to shape outcomes when the security choices of a key partner were actually made (Barnes and Makinda 2022).

The EU hosts an annual Indo-Pacific Ministerial Forum, a practice initiated in 2021 (Brzozowski 2021). This Forum brings together partners for discussions on issues such as climate change, cybersecurity, counterterrorism and energy security. Notwithstanding these efforts, the EU's ability to project power in the region remains limited compared to that of the United States and China. A recurring theme in the research findings is the need for a more unified and strategic approach externally, on the part of the EU, despite the internal divisions that continue to complicate cohesive policy implementation.

Overall, in this complex environment, the EU's IPS represents an ambitious attempt to balance economic, environmental and security priorities. In seeking to manage its relationship with China, while strengthening ties with ASEAN countries, Japan and Australia, the EU's approach has focused on building strategic partnerships, diversifying supply chains and enhancing resilience to external shocks. Nonetheless, consistent and effective engagement in the Indo-Pacific remains challenging given the difficulties in reconciling internal EU differences and aligning diverse European and regional interests. These challenges may dissolve with the repercussions of the United States–Iran war, as discussed later.

The development of the concept of the Indo-Pacific reframed both geopolitical and geographical analysis, inviting a fresh consideration of Australia's position in the region and what opportunities there may be for both Australia and the EU in this newly defined area. The most divergent views on the EU across interviewees came from academics, although all interviewees' perspectives were influenced by their individual roles and professional backgrounds.

3 | Synthesis

Most cautious in their assessments were government officials, which likely reflects the need to maintain positive, diplomatic relationships and to stay aligned with existing policy settings. Trade experts concentrated on practical obstacles and openings, generally expressing cautious optimism about economic prospects. Security specialists were more sceptical, highlighting concerns around alliance credibility and regional stability. The greatest diversity of views was found among academic respondents. These ranged from highly sceptical to strongly positive, reflecting their focus on analytical rather than relational goals, and their greater freedom to critique policy and global developments without the diplomatic constraints faced by officials. Notwithstanding the experience of most of the Australian interviewees, and their relative seniority, knowledge about the EU and its IPS was limited, as was the range of views on how the Australia–EU partnership could continue to develop. Overall, the findings suggest that the EU's real impact in Australia–Indo-Pacific relations sits somewhere between diplomatic optimism and analytical scepticism, with business and defence perspectives offering a middle-ground view shaped by operational rather than institutional considerations.

3.1 | Broader Perceptions of the EU in Australia

When sharing their broader impressions of the EU, participants generally agreed that it has become a global actor, especially in championing liberal values and a multilateral, rules-based order. Simultaneously, many noted that the EU's inherent complexity and its unusual, blended sovereignty potentially constrain the EU's capacity to fully realise its global ambitions.

Interviewees captured this ambivalence directly when asked for the first three words that came to mind in relation to the EU. One offered 'undervalued, potential and self-absorbed', in word association with the EU:

> (...) there is a perception of Europe being particularly focused on itself and struggling to act as an entity because of the need to align 27 member states. (...) it therefore is underdone and undervalued as an actor in the world. (...) [T]he EU itself would like to be seen as an agent bringing peace and security and prosperity... but you would not notice it here.
>
> (Former official)

Another located the cause in the demands of internal coordination:

> (...) was self-absorbed (...) that has a lot to do with the fact that trying to manage such different countries and just trying to get the internal dynamics of the EU to function in a way that enables them to then work as a single unit externally means they have to spend a lot of time focusing on finding out all the issues between them before they can go out.
>
> (Business representative)

A serving official had a more positive set of associations:

> The first one would be normative weight (...) The second one would be a very unique type of actor, (...) the EU is a structure, (...) that is unlike any other (...) third (...) is a defender of the international rules-based order.
>
> (Government official)

Academics produced the widest range of responses. At one end, the response was:

> Normative. Global. And democracy (...) There is nothing like this anywhere else. I am interested in

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> the type of governing that is based on discussion, consensus, deliberation, networks, but also considering the values, the human rights, the democracy.
>
> (Academic)

At the other, the response was:

> Economic clout, capability gap (...) identity (...) its diplomatic corps is nascent and has a lot of coordinating to do between the member states.
>
> (Academic)

Figure 1 depicts these disparities in the form of a Word Cloud.

Several respondents highlighted the EU's economic weight, though some still viewed it as protectionist and inward-looking. Others pointed to the EU's long-standing focus on peace and its more recent leadership on climate action:

> (...) one of the original ideas of the EU, and what makes it strong even today despite the challenges at the borders, is that the EU project is a peace project (...), there's still this idea of trying to create this kind of peaceful cohesion of countries.
>
> (Public affairs professional)

The coexistence of different assessments is instructive. Moving from admiration to reservation, one interviewee noticed:

> (...) the EU is a leader in addressing environmental concerns, especially in climate change (...). I think a lot of the measures that the EU have put in place are [increasingly] being seen by their partners, at least trade partners in the region, including Australia, as somewhat protectionist (...) [T]he third point is that we feel like there's a declining innovation and technology leadership.
>
> (Business representative)

FIGURE 1 | Perceptions of the EU.

When asked which parts of the IPS offered the greatest scope for cooperation, most participants pointed to the green transition, followed by trade and economic engagement. This aligns with the strong emphasis on climate action during von der Leyen's first Commission, an emphasis that has since shifted, with the second Commission now more focused on boosting 'competitiveness', especially in response to the widening trade deficit with China. However, even with a Sustainability chapter included in the trade agreement, it remains unclear what form cooperation on the green transition might actually take. Strengthening supply-chain resilience may become a more prominent area of joint work.

Primacy of the green transition was consistent across respondents:

> (...) definitely the green transition and emissions reductions. (...) we've got a lot to learn from Europe in terms of how they've managed and are managing their energy transition in particular.
>
> (Business representative)

Most respondents treated sustainability and the green transition as a single cluster. The clearest dissent came from the serving official, who ranked connectivity first based on institutional readiness rather than thematic importance:

> (...) connectivity (...) we have ongoing conversations with the EU about [it], particularly in the context of the EU's Global Gateway program. I'd probably rank that as number one. It seems to be the one where the EU's thinking is the most developed. And it also seems to be the one on which we have the most potential for practical collaboration.
>
> (Government official)

Digital governance recurred as the other area of clear complementarity:

> (...) the EU have done such good work in terms of developing their own standards. I think there's huge opportunity for Australia, because Australia is pretty much a taker in that area.
>
> (Business representative)

A workshop involving the EU Ambassador to Australia, the Australian research team, international reviewers and key local stakeholders allowed for a more open, exploratory discussion of the findings and the broader questions surrounding the IPS. Several themes emerged from these Sandpit conversations. One centred on the different ways ASEAN and the EU function. The two organisations take very different approaches to sovereignty and consensus-building: The EU functions as a 'proto-federal' system with formalised multilevel governance, whereas ASEAN

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is a flatter structure built around consensus and collective decision-making.

This led to a second major discussion about the role of shared values in sustaining strategic partnerships. China is undeniably a major presence in the Indo-Pacific and may endorse the idea of a rules-based order, but the key issue is how those rules are interpreted. One may speculate that the rules-based order has descended to the status of a mantra, sung freely but rarely used as a principle guiding action. This becomes clearer when looking at specific policy areas, for example, climate action or access to critical minerals, where shared interests can be more easily identified.

This distinction between values and interests was drawn sharply in the interviews:

> The problem is the EU and Europe tends, a bit like Australia (...) to go on about values, which tends to then grate in the region (...) Values are the oven in which we bake our policies here at home and when we go out to sell those policies, we need to be guided by clarity about principles and interests.
>
> (Former official)

3.2 | The EU and Australia Partnership

The EU's role in the Indo-Pacific and in Australia was rated quite moderately. There appeared to be limited awareness of the value of the regular Ministerial Forums on the IPS held since February 2022. This was also the case with the awareness of the potential gains that closer EU–Australia cooperation could release. Encouraging greater Australian participation in EU-led forums and giving greater visibility to flagship programmes such as the Global Gateway would strengthen the EU's own strategic profile. Such initiatives could enhance the EU's credibility as an actor in the Indo-Pacific. Australia's position and regional influence make it a useful partner in advancing EU priorities, including climate action, maritime security and multilateral cooperation.

The moderate ratings were accompanied by explanations that consistently located the shortfall in visibility rather than in intent:

> (...) I haven't heard of them doing much to engage on the initiatives that the US and Australia and Japan and India and the Philippines and other countries are doing (...) So, I think not visible enough. I'm not aware of major things that the Europeans are doing.
>
> (Business representative)

The most developed account of what closing that gap would require was framed as a discipline of sustained regional practice rather than of policy design:

> There is a (...) tendency (...) for the EU to think that we've published a document, therefore we've demonstrated intent (...) One thing we have learned about both Southeast Asia and the Southwest Pacific is about persistence. It's about being sustainably visible and audible. It's about being present.
>
> (Former official)

Interviewees from a business background reached the same conclusion in different language, emphasising resourcing and constancy:

> (...) [the EU's intention] has to be matched by action and of course in terms of resourcing. [The EU] needs to actually be there constantly, consistently (...) it needs to be very visible on key issues.
>
> (Business representative)

Many continue to have difficulties in understanding the EU's institutional complexity. Nonetheless, there was clear agreement that Australia and the EU share strong democratic values, an alignment that provides a solid foundation for cooperation. Many also perceived a gap between EU rhetoric, action and resources, contributing to what was described as a 'visibility deficit'. There was a consensus on the need for a more consistent and recognisable EU presence in the region.

The difficulty is also of perceptual substitution: the EU is routinely conflated with its larger Member States rather than apprehended as an actor in its own right:

> (...) from an Australian perspective, there is a tendency for people to perceive the EU through a prism that refracts into the member states rather than the institution as a whole.
>
> (Former official)

Officials did not dispute the substance of this, though they described it as a working reality rather than as a failure of Australian comprehension:

> [Member States] they're all equal, they all have [a voice]. But then when one comes to the politics and the strategies, it's quite clear that France and Germany continue to be the fulcrum around which everything else turns.
>
> (Government official)

Where the EU is engaged directly in the region, a further criticism concerned the fit between its administrative requirements and the capacity of the states it seeks to assist:

> (...) the EU often brings administrative and bureaucratic requirements that are not compatible with the capacity of small island governments.
>
> (Former official)

Views on the EU's global role, however, varied considerably—from seeing it as a 'normative leader' to deeming it as

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'self-absorbed'. Perceptions of its strategic relevance were similarly mixed: For some, the EU is an essential partner grounded in shared values; for others, it remains a peripheral player. This is illustrated by the following representative quotes from respondents asked to rank the EU, China, ASEAN and the United States as the most important partner for Australia in the Indo-Pacific:

> I would (...) put the EU last. [T]here's a lot to be done if the EU is really serious to change that perspective (...) It will need to project influence. It will need to actually demonstrate much more, that it is prepared to be open to other countries. There's no point trying to be a leader in environmental issues, in so-called open trade, if at the end of the day your messaging is not consistent with your actions.
>
> (Business representative)

> Australia's economic and social model is based on a European one. And [I] like to think that Australia is aligned as a values-driven society (...) which is much more aligned to the European outlook.
>
> (Business representative)

More broadly, these responses echo the ambivalence that shaped Australian attitudes towards the emerging European Economic Community from the 1960s through the 1980s. Many current policymakers were students or early-career professionals during that period and may be inchoately influenced by those earlier impressions.

3.3 | IPS Assessments

Assessments of the EU's IPS itself divided along role lines more sharply than any other question. The serving official was unreservedly positive and read the IPS as the outcome of sustained Australian advocacy:

> (...) for a long time Australia's been trying to convince the EU of the value of having an IPS and having deeper engagement in our region (...) it's a very, very positive thing because it means that the EU [is] marshalling its resources to look towards our region.
>
> (Government official)

Another response located the problem not in the IPS but in the competition for Australian official attention:

> I can imagine lots of nice words about this in Canberra. But you know, after the press conferences [have] ended, they go back and focus on AUKUS.
>
> (Academic)

One respondent, however, reframed the question of implementation, arguing that the EU's characteristic instruments are precisely the soft ones that outside observers fail to notice:

> It's not only about strategic documents, it's about strategic collaboration, strategic work towards specific goals (...) if there is an increased exchange or increased collaboration, that is something that is already an added value.
>
> (Academic)

For business respondents, the missing element was a practical vehicle, particularly for the small and medium enterprises that make up most of Australia's exporter base:

> (...) the strategy itself is not very clear about how Australia and the EU could actually work together (...). [A]t the business to business level, especially for SMEs, there are no traditional ways to do that. And there is no mechanism or assistance to make that happen.
>
> (Business representative)

It should be stressed that the interviews were conducted while the free trade negotiations were suspended, a fact that may well have coloured assessments of EU intent across the sample:

> I think it's been extremely damaging, the failure to conclude an EU FTA with one of the most prominent (...) economies in the region (...) The perception is that major compromises have been proposed for years by Australia as an agricultural exporter with stonewalling by Europe (...) because the EU has made compromises to conclude such agreements with other Pacific Western allies, Canada and New Zealand most notably, it begs the question as to why not Australia?
>
> (Former official)

Government respondents were markedly more contained and were at pains to distinguish a trade setback from relationship issues:

> How did we respond? (...) with a lot of disappointment that it wasn't able to be concluded (...) it's a setback, but it's not a disaster. And it's not a disaster for the relationship (...) in the broader picture of how much we do strategically, how much we align with the EU, even on trade policy issues.
>
> (Government official)

Others viewed the impasse as a recurring structural problem rather than as a single failure of will, and questioned the wisdom of a single-instrument approach:

> I was unsurprised. I think agriculture is always a sticking point for both sides (...) There is a tendency in our country to think that if we can't get a better deal for agriculture, the deal isn't worth doing. And there is a tendency in the European Union to say that agriculture can never be part of a deal unless solely on

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> the EU's terms (...) we can do good things in digital, we can do good things in cloud computing, we can do good things in standards, we can do good things in financial services (...) why there has to be a single speed approach.
>
> (Former official)

Several respondents turned the criticism back towards Australia, treating the impasse as symptomatic of domestic rather than European deficiencies:

> (...) it just links to a couple of deficiencies that we've got as a country. So one is the lack of interest in the complexities of the European Union, because it's not easy to understand what [the] European Union is, how it works and so on, what it represents. The second is (...) lack of strategic thinking and long-term strategic thinking from the Australian government (...) we don't see ourselves somehow as a global player that we could be.
>
> (Academic)

The question which now arises, after the new energy which comes with the agreements in March 2026, is how might a stronger EU–Australia relationship contribute to the IPS, and support a new phase of EU engagement with China and other key partners in the Indo-Pacific? Addressing this question is all the more pressing in the light of the US war on Iran and counterblockade introduced by the United States on the Strait of Homuz in April 2026. This course of action was adopted unilaterally by the United States without any prior consultation with its traditional partners and allies, including Australia and the EU. Regardless of the outcome of such a blockade, the mere fact that this course of action has been adopted reinforces the need for both Australia and the EU to recalibrate their relations with each other as well as with the United States.

The repercussions of the war between the United States and Iran for the global economy and energy supply chains, particularly for oil and gas, will surely accelerate efforts to improve the availability and reliability of renewable energy sources. Already, there is significant European investment in Australian renewable projects. Korea is also accelerating its focus on renewable energies, particularly wind, and China is a significant source of renewable technologies. This suggests that there is some scope for the EU and Australia to exercise leadership in building Indo-Pacific collaboration that could hasten the production of the technologies necessary to replace fossil fuels as energy sources.

Existing European investment in Australian renewables was one of the few areas in which interviewees identified concrete EU relevance to Australian domestic priorities:

> (...) the EU is most relevant in terms of the energy transition; a number of European companies investing in solar farms here and wind farms is really important to that.
>
> (Business representative)

Both Australia and the EU face the challenge of managing their economic interdependence with China, while also dealing with the systemic rivalry China poses to the international rules-based order. At the same time, China itself is feeling the impact of disruptions to its supply chains into Europe and the Middle East. Through their networks of regional partnership agreements—including with ASEAN and the CPTPP—Australia and the EU have opportunities to work together to diversify supply chains and trade routes, reinforce the value of dialogue and peaceful engagement, and highlight the universal importance of maritime security and resilience.

This is a further incentive for Australia and the EU to deepen their relations across the wider range of policy areas encompassed by the framework of agreements between them. Both ought to cooperate in the Indo-Pacific region to reinforce the stabilising capacity of soft power, diplomacy and development.

4 | Future Policy

Any assessment of the EU's future role must confront a prior question: whether the 'rules-based international order' to which both the EU and Australia profess commitment still meaningfully exists. Its status as 'intact', 'eroding', 'superseded' or 'being actively replaced' is very much in question in 2026. At Davos, in March 2026, Canadian Prime Minister Mark Carney declared that the traditionally US-led rules-based order 'is over and will not be coming back'. He urged that this be regarded positively, 'we should not mourn it. Nostalgia is not a strategy' (Carney 2026). Clearly, he viewed it as a genuine turning point.

Shortly thereafter, von der Leyen echoed Carney's sense of finality and gave voice to the consequence 'if this change is permanent then Europe must change permanently too' (von der Leyen 2026). Her message to EU ambassadors is that Europe must pursue 'strategic autonomy' and targeted trade agreements or be left behind, mired in outdated thinking:

> Europe can no longer be a custodian for the old world order, for a world that has gone and will not return.

This observation gave rise to a diplomatic backlash, leading her to declare her 'unwavering support' for international law.

It is possible to conceptualise the fallout from this along three distinct pathways. The 'it's over' path, identified, at least initially, by Carney and von der Leyen, envisages a dead end which requires a new beginning. The second path emerged from Davos 2026 and builds on a diversification model—the rules-based order is morphing into multiple orders: American, European and Asian. The third path is paved by scholars (e.g., G. John Ikenberry 2018) who argue that, while the rules-based order as it has been known is on the wane, its underlying principles of openness, multilateralism and rules are fundamental and likely to persist, albeit in a different form.

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One respondent synthesised the situation as follows:

> ...a chilling reminder of what the world can look like where large autocratic countries can [act] unrestrained by an effective international system (...) the absence of the global governance mechanisms that actually work.
>
> (Business representative)

If the rules-based order no longer has validity as a fundament, then the case for EU–Australia cooperation rests less on the defence of an existing settlement than on a more demanding proposition: that a coalition of middle powers must now actively construct and underwrite the rules it wishes to see observed, in the Indo-Pacific as elsewhere. It is precisely as fellow middle powers—rather than as junior partners of a hegemon whose reliability can no longer be assumed—that the EU and Australia have the strongest reason, and the clearest opportunity, to act together.

In the shifting geopolitical environment, a key question for the EU will be whether it can maintain its commitment to the multilateral, rules-based order. If it can do so, the EU could play a significant role in mediating potential tensions between China and the United States in the Indo-Pacific region. This would, however, require additional resourcing and a demonstrated ability to engage more deeply with ASEAN, Korea, Japan and Australia in the key areas of the EU's IPS.

There is now a thicker framework for deeper, more extensive cooperation and a stronger partnership, overall, between the EU and Australia. This presents the EU with a real opportunity to advance its strategic ambitions in the Indo-Pacific. Australia has a well-established identity in the region and, together with Indonesia, is in a pivotal position in the Indo-Pacific. Possible initiatives to enable the EU to increase its visibility in the region and to leverage the potential of its relationship with Australia include:

1. Placing greater emphasis on the joint work already being undertaken between the EU and Australia on the green transition. Raising the profile of these efforts would improve public understanding, engagement and the likelihood of successful outcomes.
2. Building on the shared commitment to sustainable prosperity in the Indo-Pacific, the EU and Australia could pursue initiatives through the A-EU FTA structure and other associated arrangements. Although China's Belt and Road Initiative is widely recognised in Australia, there is no corresponding awareness or recognition of the EU's Global Gateway initiative.
3. Although the EU and Australia maintain regular dialogue on digital issues, this work is, similarly, poorly known and understood. At a time of increasing concern about cybersecurity, disinformation and social media risks, joint engagement with other Indo-Pacific partners could help strengthen the EU's credentials as a serious regional actor.
4. Including senior Australian representation at the annual Ministerial Forums on the IPS would improve the depth of EU–Australia cooperation in this region. The EU could also invite Australia to co-lead a forum session on climate action with Pacific Island nations.
5. The EU could investigate ways of mobilising diasporic networks to raise public awareness of EU policies, values and initiatives, helping to build a better-informed Australian constituency for EU–Australia relations.

5 | Conclusion

This research highlights a clear gap between the EU's strategic ambitions in the Indo-Pacific and the perceptions of such ambitions held by relevant Australian stakeholders. The EU and Australia may have long-standing historical ties, strong economic links, shared democratic values and alignment on priorities such as the green transition. However, these cannot overcome the cautious scepticism of many Australian stakeholders regarding the EU's ability to act as a meaningful Indo-Pacific player. In this region, the United States and China are still regarded as holding more influence than the EU.

In Australia, public awareness of the EU in general—and of its IPS in particular—is poor. The complexity of the EU institutions and the challenges of coordinating policy settings across 27 Member States reinforce the perception that the EU often falls short in delivering on its own rhetoric. The development of alternative frameworks for regional cooperation, such as AUKUS and the Quad, and the difficulties of successfully concluding the FTA negotiations also present challenges for the EU in leveraging its relationship with Australia. These factors can be distilled into a core challenge that the EU experiences. Despite its long-standing presence in the region, strategic ambitions and considerable resources, the EU is still to achieve contemporary visibility and influence in the Indo-Pacific region.

Increasing instability across the globe and the shift in US foreign policy under the Trump administration must surely present the EU with new opportunities for engagement with middle powers in the region. The foundations of the EU–Australia partnership remain strong and the EU continues to maintain significant cultural ties and economic weight in the region. The green transition, digital governance and sustainable prosperity, particularly, offer promising areas for deeper cooperation.

The interviews support this reading. Scepticism about the EU's regional weight coexisted, across the sample, with an explicit welcome for deeper engagement and a clear statement of what would be required to make it credible. No respondent argued that European engagement in the region was unwanted; the criticism was consistently that the EU had not yet furnished evidence commensurate with its stated ambitions.

If the EU can articulate a clear, distinctive role that complements existing partnerships in the Indo-Pacific, Australia is well placed to act as a force multiplier for Europe's engagement in this region, given Australia's established position in the region as well as its historical ties to Europe. To achieve this visibility and influence in the region, the EU will need resources matching such ambition and a more consistent presence, evidenced through concrete initiatives, and creative ways of drawing on

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the rich yet underutilised historical and cultural foundations of the Australia–EU partnership.

The deeper implication of this research is that the conditions which once allowed the EU's Indo-Pacific engagement to appear optional—a stable order underwritten by others—have gone. In an international system increasingly organised around power rather than rules, Australia and the EU are no longer merely like-minded partners with an under-exploited relationship; they are middle powers with a shared and pressing interest in ensuring that the rules governing the Indo-Pacific are written with their participation rather than without it. On the evidence presented here, that case has yet to be fully grasped on either side. It has, however, never been more compelling, and the agreements concluded in March 2026 offer a foundation on which it can now be made.

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Conflicts of Interest

The authors declare no conflicts of interest.

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Research data are not shared.

Endnotes

[1] Respondent categories: Government official; Former official; Academic; Business representative; Public affairs professional.

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