

# ASAN REPORT

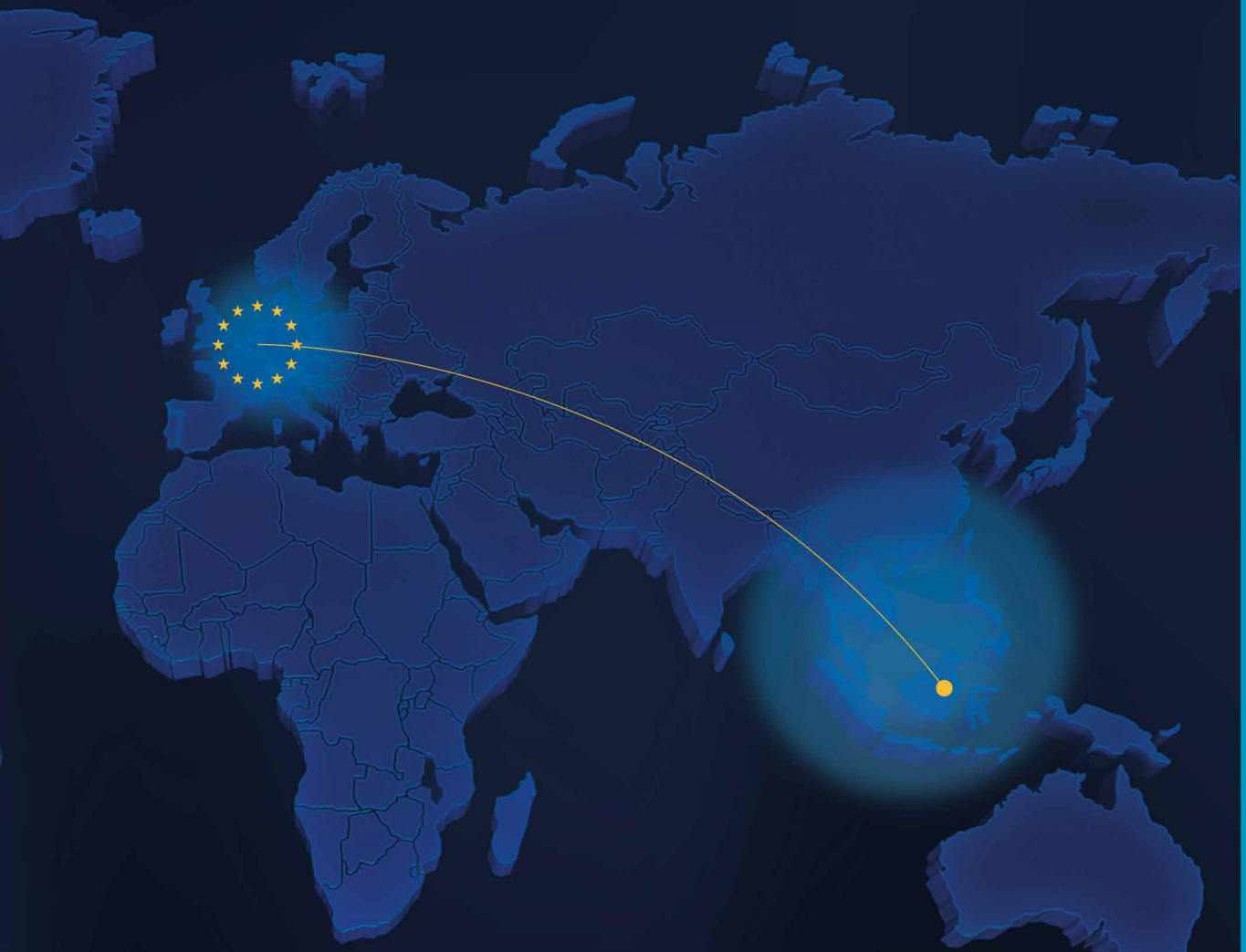
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## Europe's Security Engagement in the Indo-Pacific

Limits and Pathways for Cooperation

KIM SAEME

JUNE 2026



Asan Report

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in the Indo-Pacific**

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The Asan Institute for Policy Studies



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The report was submitted in December 2025 and does not reflect subsequent developments. The views expressed herein are solely those of the authors and do not reflect those of the Asan Institute for Policy Studies.

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## Executive Summary

Europe's turn toward the Indo-Pacific has unfolded over the past five years through the European Union (EU), the North Atlantic Treaty Organization (NATO), and national strategies that increasingly describe the region as essential to Europe's economic stability, maritime security, and the preservation of the rules-based order.

Across these strategies, several patterns have emerged. Europe's Indo-Pacific focus is largely China driven. For example, concerns about China, such as its use of economic dependency as political leverage and its contestation of maritime norms, shapes nearly every national Indo-Pacific strategy. Yet Europe's responses rely heavily on diplomacy, regulation, and presence missions rather than military power, reflecting limited expeditionary capacity and a desire to avoid becoming entangled in Sino-American rivalry. This has reinforced Europe's preference for non-traditional security domains, such as maritime governance, cyber resilience, climate and disaster relief, and capacity-building, where it can act as a normative and civilian power. Russia's invasion of Ukraine has further narrowed Europe's bandwidth, pulling resources back to the European theatre and prompting a pragmatic recalibration of the Indo-Pacific ambitions. Meanwhile, South Korea, despite robust bilateral cooperation with several European states, remains peripheral within most European Indo-Pacific strategies, overshadowed by Japan, Australia, India, and the Association of Southeast Asian Nations (ASEAN) in Europe's China-oriented framing.

These dynamics yield two broader implications. First, Europe's most meaningful role in the Indo-Pacific will be governance-based: standard-setting, export controls, sanctions enforcement, illicit-finance disruption, maritime law, digital rules, and connectivity finance. These instruments rarely shift military balances, but they can produce strategic benefits, for example, better maritime domain awareness, tighter proliferation monitoring, and more resilient supply chains. Second, Europe's engagement will continue to be shaped and constrained by the United States. U.S. leadership amplifies European rule-making and lowers the cost of signalling in the region, but Washington's preference for "more Europe in Europe" limits the scope for autonomous European hard-security activism in Asia, reinforcing a functional division of labour.

The report therefore recommends that Europe avoid over-centralizing Indo-Pacific policy under a single EU framework and instead empower coalitions focused on Europe's comparative strengths, while significantly expanding use of the NATO-IP4 format as its primary security platform with the region. Institutionalizing NATO-IP4 ministerial dialogue, producing shared threat assessments, and planning long-term transregional exercises would shift Europe's Indo-Pacific engagement from summit-driven commitments toward arrangements with their own institutional momentum, such as standing working groups or scheduled exercises. For South Korea, the report urges reframing North Korea as a governance challenge—illicit finance, sanctions evasion, cyber operations, and arms transfers to Russia—that aligns directly with European concerns related to China and Russia. Seoul should complement strong bilateral ties with a region-wide strategy that uses NATO-IP4 and EU mechanisms to anchor South Korean priorities within Europe's evolving Indo-Pacific thinking.

## I. Introduction

Over the past several years, Europe has become an increasingly visible presence in the Indo-Pacific. Institutions like the European Union (EU) and major states such as the United Kingdom (UK), France, and Germany have all issued Indo-Pacific strategies, dispatched naval vessels, and intensified diplomatic outreach. This expanding activity reflects Europe's ambition to project global influence and uphold the rules-based international order beyond its immediate neighborhood.

Yet, five plus years into many of these Indo-Pacific strategies, the nature and sustainability of this engagement remain ambiguous. While Europe's Indo-Pacific discourse suggests strategic ambition, the substance often appears symbolic. The gap between Europe's declaratory vision and its operational means has widened in the wake of global crises like Russia's invasion of Ukraine.

This Asan Report argues that Europe is present in the Indo-Pacific, but not necessarily for the Indo-Pacific security architecture. Europe's involvement appears to be motivated by the politics of global identity and the management of China's rise rather than a comprehensive, region-centered strategy. Put another way, the Indo-Pacific has become an arena in which European actors articulate their relevance in an era of U.S.-China rivalry while still being cautious of provoking China. In practice, this has meant that Europe's Indo-Pacific engagement remains largely declaratory in that it reinforces the image of a "global Europe" without substantially redistributing resources or attention away from its traditional focus on its own neighborhood.

The geopolitical environment confronting Europe has changed dramatically since Russia's full-scale invasion of Ukraine in 2022. The war has absorbed much of Europe's strategic attention, military resources, and political bandwidth, forcing a re-evaluation of priorities across different European states. At the same time, the sharpening U.S.-China rivalry and the return of a transactional U.S. foreign policy under a second Trump presidency have raised questions about Europe's capacity to sustain an Indo-Pacific presence. As many European governments provide an updated or revised version of their Indo-Pacific strategies, a clearer picture is emerging of what Europe can and cannot realistically achieve in the region. Understanding the limits and implications of this evolving engagement is therefore both timely and necessary, particularly for partners like South Korea, which are currently deepening security and defence cooperation with Europe.

This report is structured as follows. Section II examines how the Indo-Pacific has entered Europe's strategic imagination, focusing on the EU, NATO, and selected European states, and highlights how South Korea is positioned within these frameworks. Section III draws out five observations that characterize the direction of European Indo-Pacific strategies. Section IV highlights the broader implications for Europe's strategic role and for South Korea's engagement with European partners. Section V offers recommendations for both Europe and South Korea, and Section VI concludes with reflections on the future of Europe-South Korea cooperation in the Indo-Pacific.

## II. Europe's Strategic Turn to the Indo-Pacific

Europe's Indo-Pacific engagement did not emerge overnight. It has been gradually built up over roughly a decade through EU<sup>1</sup> and NATO<sup>2</sup> strategy documents, and through national guidelines issued by key member states,<sup>3</sup> some of which predated the

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1. The EU Global Strategy (2016) first acknowledged the strategic importance of Asian security developments for Europe. While the EU had bilateral partnerships with countries in Asia long before 2016, this was when Asia's security dynamics began to be integrated into a comprehensive EU foreign policy strategy for the first time. This was followed by sector-specific documents that deepened EU engagement with Asian security. For example, the EU Connectivity Strategy (2018) signalled growing attention to infrastructure and economic resilience, while the Council Conclusions on Enhanced EU Security Cooperation in and with Asia (May 2018) established the ESIWA initiative, addressing maritime security, cybersecurity, counterterrorism, and crisis management. For the relevant documents, see: European Union, *Shared Vision, Common Action: A Stronger Europe — A Global Strategy for the European Union's Foreign and Security Policy*, June 2016; European Commission and High Representative, *Connecting Europe and Asia: Building Blocks for an EU Strategy*, September 2018; Council of the European Union, *Enhancing EU Security Cooperation in and with Asia — Council Conclusions*, 28 May 2018.
  2. NATO's engagement with the Indo-Pacific followed a gradual trajectory. China was absent from NATO's official summit communiqués until December 2019, when the London Declaration noted for the first time that “China's growing influence and international policies present both opportunities and challenges” for the Alliance. The language sharpened at the 2021 Brussels Summit, where China's “stated ambitions and assertive behaviour” were described as presenting “systemic challenges to the rules-based international order.” The decisive shift came at the 2022 Madrid Summit, where NATO's new Strategic Concept described China's “ambitions and coercive policies” as challenging the Alliance's “interests, security and values,” and the leaders of Australia, Japan, South Korea, and New Zealand (IP4) joined a NATO summit at the heads-of-state level for the first time. For the relevant documents, see: NATO, 2019 London Declaration, December 4, 2019; NATO, Brussels Summit Communiqué, June 14, 2021; NATO, *2022 Strategic Concept*, June 2022; NATO, *Madrid Summit Declaration*, June 29, 2022.
  3. Ministère des Armées, France, *La stratégie de défense française en Indopacifique*, May 2019; Ministère des Armées, France, *France and Security in the Indo-Pacific*, May 2019; UK Cabinet Office, *Global Britain in a Competitive Age: The Integrated Review of Security, Defence, Development and Foreign Policy*, March 2021; UK Cabinet Office, *Integrated Review Refresh 2023: Responding to a More Volatile World*, HM Government, March 2023; Federal Foreign Office, Germany, *Germany – Europe – Asia: Shaping the 21st Century Together – Policy Guidelines on the Indo-Pacific*, September 2020.

'Indo-Pacific' label itself. This section maps the main elements of this strategic turn and shows how it sets the stage for the patterns analyzed later in the report.

## 1. The EU's Indo-Pacific Strategy

In September 2021, the EU released its *EU Strategy for Cooperation in the Indo-Pacific*. Out of the seven areas of focus,<sup>4</sup> "security and defence" stood out due to the EU's growing recognition that stability in the Indo-Pacific is directly linked to its own economic and geopolitical security. This section of the strategy marked a notable shift from Europe's traditionally economy-driven engagement with Asia to one that explicitly acknowledged the Indo-Pacific as a strategic theatre of competition among major powers.

Here, it notes that the EU and Indo-Pacific partners face similar security challenges and sketches several core lines of cooperation:

- Enhancing naval presence to safeguard sea lanes and respond to maritime crises;
- Building maritime security capacity, including maritime domain awareness, maritime law enforcement, and coast-guard cooperation;
- Broadening partnerships through defence dialogue, joint exercises, and technology collaboration;
- Addressing new security challenges such as cyber threats, hybrid warfare, critical infrastructure resilience, and disinformation.

The document underscores Europe's interest in preserving freedom of navigation, strengthening maritime domain awareness, and working with like-minded partners to uphold the rules-based international order. It emphasizes the need to enhance naval presence in the Indo-Pacific,<sup>5</sup> signalling that the EU no longer views itself as a passive economic actor but as a contributor to regional stability.

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4. The seven priority areas are: (1) sustainable and inclusive prosperity; (2) green transition; (3) ocean governance; (4) digital governance and partnerships; (5) connectivity; (6) security and defence; and (7) human security. For the relevant document, see: European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *EU Strategy for Cooperation in the Indo-Pacific*, European External Action Service, September 16, 2021.

**Figure 1. Group Photo of Participants at the 3rd EU Indo-Pacific Ministerial Forum**



Source: European External Action Service (EEAS), “EU Indo-Pacific Ministerial Forum,” Brussels, February 2, 2024.

At the same time, the document avoids framing itself as being explicitly anti-China. While it recognizes the threat coming from authoritarian regimes,<sup>6</sup> and notes the militarization of certain sea areas, the strategy explicitly states that its approach is not directed against China and frames even its security commitments in terms of multilateral norms and UNCLOS rather than balance-of-power logic. It highlights shared challenges such as piracy, drug trafficking, human trafficking, illicit financial flows, and disruptions to maritime commerce, and stresses the importance of upholding freedom of navigation and open sea lanes without naming any country as a threat.<sup>7</sup>

In parallel, the EU has also sought to anchor its Indo-Pacific engagement in regular high-level diplomacy. Since 2022, the EU has convened a regular Indo-Pacific Ministerial Forum, bringing together foreign ministers from across Europe and the Indo-Pacific to exchange assessments on regional security, economic resilience, and

5. European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *EU Strategy for Cooperation in the Indo-Pacific*, European External Action Service, September 16, 2021.

6. *Ibid.*, p. 2.

7. *Ibid.*, p. 4.

governance challenges. Although the Forum is not a decision-making body, it has become the EU's main political platform for signalling commitment to the region, coordinating capacity-building initiatives, and sustaining dialogue with key partners such as Japan, Australia, India, and ASEAN member states.<sup>8</sup>

## 2. NATO's Indo-Pacific Turn

At the Madrid Summit on 29 June 2022, NATO released its new *Strategic Concept*,<sup>9</sup> where it officially expanded its strategic engagement toward the Indo-Pacific. The reasons behind this expansion were similar to those driving the EU's recalibration: the rise of China as a systemic rival,<sup>10</sup> the increasing linkage between Euro-Atlantic and Indo-Pacific security, and the recognition that global challenges such as cyber threats, disinformation, supply-chain vulnerabilities, and critical infrastructure protection, require transregional responses.

The *2022 Strategic Concept* stated that China's "ambitions and coercive policies challenges our interests, security and values"<sup>11</sup>, notably the first time a NATO Strategic Concept had addressed China at all, and underscored the need to deepen cooperation with Indo-Pacific partners such as Australia, Japan, South Korea, and New Zealand, collectively known as the "IP4." NATO's Indo-Pacific thinking has since taken more concrete form around three themes. First, political consultation with Indo-Pacific

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8. European External Action Service, Third EU Indo-Pacific Ministerial Forum, Brussels, 2 February 2024. The first Forum was held in Paris on 22 February 2022 under the French Council Presidency; the second in Stockholm on 13 May 2023 under the Swedish Presidency. For the inaugural Paris Forum, see: EEAS, Ministerial Forum for Cooperation in the Indo-Pacific, 22 February 2022.

9. NATO's Strategic Concepts are its highest-level guiding documents, adopted roughly every decade to define the Alliance's core security environment, strategic priorities, and tasks. They outline NATO's purpose, identify principal threats, and set the political-military direction for collective defence, crisis management, and cooperative security. For the relevant document, see: NATO, *2022 Strategic Concept*, June 29, 2022.

10. NATO, *Madrid Summit Declaration*, June 29, 2022; European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *EU-China — A Strategic Outlook*, JOIN(2019) 5 final, Strasbourg, 12 March 2019.

11. NATO, *2022 Strategic Concept*, June 2022, p. 4.

partners on shared threats and challenges; second, practical cooperation on cyber defence, resilience, non-proliferation, and maritime situational awareness; and third, symbolic engagement, including the presence of Indo-Pacific leaders at NATO Summits and references to the IP4 in key communiqués.

However, NATO's role in the Indo-Pacific remains somewhat contested. As a primarily North Atlantic alliance, there are debates over whether NATO should, in fact, have any role in the Indo-Pacific region.<sup>12</sup> With increasing recognition of the growing military capabilities of China, North Korea, and Russia, and the increasingly intertwined development of security in the two regions, there is pressure on NATO to stay engaged in the region, but even then, there are practical considerations of how many resources NATO can devote to a relatively faraway region.<sup>13</sup>

**Figure 2. United States and Indo-Pacific Partners Leaders' Meeting at the NATO Summit**



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12. Camille Grand, "NATO's Role in Asia: A Work in Progress," Fondation pour la Recherche Stratégique, April 4, 2024; Michito Tsuruoka, "Six Myths About NATO's Engagement in the Indo-Pacific," *The Diplomat*, October 27, 2023.

13. Alexander Lanoszka, Balkan Devlen, and Jonathan Berkshire Miller, *Hard Constraints - The Supply and Demand of NATO in the Indo-Pacific*, MacdonaldLaurier Institute, June 11, 2024; Stephen Nagy, "How NATO Can Strengthen Its Ties with the Indo-Pacific," *East Asia Forum*, January 10, 2025.

### 3. National Indo-Pacific Strategies and Rationales

Beyond the EU and NATO, a growing number of European states have published Indo-Pacific strategies or guidelines, each reflecting their own strategic culture, geography, and economic interests. While most align broadly with EU and NATO approaches, there are important differences in emphasis and scope.

- France first articulated the strategy in 2018 and published it as an official inter-ministerial document in 2021, with a subsequent update in 2022. France frames the Indo-Pacific not as a distant theatre but as a space of direct sovereignty and national interest, owing to its extensive overseas territories and exclusive economic zones (EEZs) in both the Indian and Pacific Oceans.<sup>14</sup> Its strategy is organised around sovereignty protection, freedom of navigation, and regional stability. France emphasizes multilateral security cooperation, maritime presence, and defence partnerships. France's posture combines a resident military footprint (around 7,000 defense personnel, 15 warships, and 38 aircraft) with regular missions such as the *Clemenceau* missions, in which the Charles de Gaulle carrier strike group deploys across the Indo-Pacific.<sup>15</sup>
- Germany adopted its *Policy Guidelines for the Indo-Pacific* in 2020.<sup>16</sup> Germany's approach is clearly multilateral and rules-based. It identifies three main drivers: safeguarding economic stability and open trade routes; balancing U.S.-China rivalry through diversified partnerships; and reinforcing multilateral governance through ASEAN, the United Nations (UN), and EU frameworks.<sup>17</sup> Rather than projecting military power, Germany uses the guidelines to anchor its Indo-Pacific interests in multilateral institutions including ASEAN, the UN, and EU frameworks, treating rules-based governance as the primary vehicle for protecting German interests.
- The UK, through its *Integrated Review* (2021)<sup>18</sup> and *Integrated Review Refresh*

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14. Ministère des Armées, France, *France and Security in the Indo-Pacific*, 2018, pp. 6-7.

15. Ministère de l'Europe et des Affaires étrangères, *Indo-Pacific: Key Strategic Points (synthèse)*, 2021, pp. 11-13.

16. German Federal Government, *Guidelines for the Indo-Pacific Region*, 2020, p. 1.

17. Jan Kliem, *Shaping Tomorrow's International Order: Germany's Policy Guidelines for the Indo-Pacific*, ISEAS - Yusof Ishak Institute, ISEAS Perspective No. 117, February 5, 2021, pp. 3-4.

(2023),<sup>19</sup> articulated an “Indo-Pacific Tilt.” Driving the tilt is a post-Brexit imperative to reassert Britain’s identity as a global maritime power in which the UK needs to demonstrate that leaving the EU did not shrink its strategic footprint. Practically, this means protecting maritime trade routes, managing long-term competition with China, and using coalitions such as AUKUS (Australia, United Kingdom, the United States) and the Five Power Defence Arrangements (FPDA) to tie its Indo-Pacific commitments to the transatlantic security architecture.<sup>20</sup> The UK aims to reaffirm its identity as a global maritime power and project a persistent presence in the Indo-Pacific region.

- The Netherlands released its *Indo-Pacific Guidelines* in 2020 framing its rationale around democracy, the rule of law, human rights, freedom, free trade, and a functioning multilateral world order.<sup>21</sup> As a mid-sized maritime trading nation, the Netherlands views instability in the Indo-Pacific as a direct threat to its prosperity.
- Lithuania represents a smaller yet particularly vocal actor. When Lithuania permitted the opening of a Taiwanese Representative Office in Vilnius in November 2021 (the first in Europe to use the name ‘Taiwan’ rather than ‘Taipei’)<sup>22</sup>, Beijing responded with a downgrade of diplomatic relations and targeted export embargoes. To this, Lithuania responded with its 2023 Indo-Pacific Strategy<sup>23</sup> and demonstrated that it was prepared to absorb significant economic retaliation rather than reverse a symbolic diplomatic action.<sup>24</sup> The

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18. UK Cabinet Office, *Global Britain in a Competitive Age: The Integrated Review of Security, Defence, Development and Foreign Policy*, March 2021.

19. UK Cabinet Office, *Integrated Review Refresh 2023: Responding to a More Contested and Volatile World*, March 2023.

20. *Ibid.*, p.9, p.29.

21. Government of the Netherlands, *Indo-Pacific: Guidelines for strengthening Dutch and EU cooperation with partners in Asia*, November 2020; reproduced in *The World and Japan Database*, National Graduate Institute for Policy Studies (GRIPS) and Institute for Advanced Studies on Asia (IASA).

22. Konstantinas Andrijauskas, *The Sino-Lithuanian Crisis: Going Beyond the Taiwanese Representative Office Issue*, Briefings de l’Ifri, Ifri, March 8, 2022, pp. 1-2.

23. Ministry of Foreign Affairs of the Republic of Lithuania, *For a Secure, Resilient and Prosperous Future: Lithuania’s Indo-Pacific Strategy*, July 5, 2023, p. 4.

24. Aleksander Lust, “What’s Driving Lithuania’s Challenge to China?” *The Diplomat*, August 17, 2024.

episode provided Brussels with a tangible case of economic coercion, reinforcing political support for the EU's Anti-Coercion Instrument and intensifying debate over whether smaller member states could rely on collective European solidarity when targeted by Beijing.<sup>25</sup>

- More recently, countries such as Sweden have also begun to frame their Indo-Pacific engagement.<sup>26</sup> Sweden's document is explicitly defence-industrial in character, prioritising military cooperation and technology-sharing with partners who share its democratic commitments. Its recent *Defence Policy Direction for Cooperation with Countries in the Indo-Pacific Region* highlights democratic partnerships, technological resilience, and critical supply-chain security as key drivers, and explicitly identifies partners such as Japan, Australia, and South Korea.<sup>27</sup>

Despite national variations, there are several common threads that can be observed throughout these strategies. Namely, developments in the Indo-Pacific are seen as directly affecting European security, prosperity, and the rules-based international order. At the same time, Europe's operational tools remain limited, and its political calculus is quite cautious. This will be considered in more depth in Section III.

#### 4. Early Patterns of Security Engagement

European security and defence engagement in the Indo-Pacific has expanded since 2020, though unevenly.

- France maintains the most robust and permanent military footprint, with five commands across the Indian and Pacific Oceans, routine patrols, and regular participation in joint exercises.<sup>28</sup> It has been the most proactive in its naval deployments to the region, including the annual Mission *Jeanne d'Arc* amphibious deployments and successive *Charles de Gaulle* carrier strike group missions, most

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25. Valbona Zeneli, "Lithuania's Policy on China: An Unlikely EU Trailblazer," *Atlantic Council*, November 10, 2025.

26. Government Offices of Sweden, *Defence Policy Direction for Cooperation with Countries in the Indo-Pacific Region*, August 16, 2024, p. 3.

27. *Ibid.*, pp. 5-6.

28. Sciences Po Observatory Indo-Pacific, "Indo-Pacific Strategies," Sciences Po, updated 2024.

recently *Clemenceau 25*.

- The UK has projected a significant post-Brexit presence through deployments like the 2021 *Carrier Strike Group 21* mission led by HMS *Queen Elizabeth*, and two permanently forward-deployed OPVs (HMS *Tamar* and HMS *Spey*) which have been based in the region since 2021, as well as participation in AUKUS.<sup>29</sup>
- Germany and the Netherlands have undertaken more episodic but symbolically important deployments. Germany's *Bayern* mission in 2021 and Indo-Pacific Deployment 2024 (IPD 2024) signalled a shift from declaratory policy to operational presence,<sup>30</sup> while the Netherlands has participated in regional exercises and used the deployments largely to reinforce its argument for a stronger EU-level Indo-Pacific presence, consistent with The Hague's preference for multilateral over bilateral engagement.<sup>31</sup>
- Sweden has focused more on dialogue, cyber and hybrid threats, and defence-industrial cooperation than on physical deployments, though it has recently begun to participate in Indo-Pacific naval operations.

South Korea already appears in some of these documents and activities, but generally in a modest way. South Korea is often grouped with other like-minded democracies or mentioned as a potential partner, rather than treated as a central pillar of the European Indo-Pacific Strategy. This marginal positioning is examined in more detail in Section III.

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29. UK Ministry of Defence, "HMS Queen Elizabeth Returns Home as Historic Global Deployment Comes to an End," press release, 9 December 2021. Royal Air Force, "UK Carrier Strike Group Embarks on Collaborative Indo-Pacific Mission," *RAF News*, April 9, 2025.

30. Bundeswehr (German Armed Forces), "Indo-Pacific Deployment 2024 (IPD-24) - German Navy," May 8, 2024; Bundeswehr, "German Navy Concludes Indo-Pacific Deployment 2024," *Naval News*, October 12, 2024.

31. Government of the Netherlands, *Indo-Pacific: Guidelines for strengthening Dutch and EU cooperation with partners in Asia*, November 2020, p. 8; Vivienne Machi, "European Forces Flex Their Indo-Pacific Reach," *Defense News*, June 11, 2023.

### III. Observations

This section draws out five observations from in the Indo-Pacific strategies of France, the UK, Germany, the Netherlands, and Lithuania, and the EU and NATO documents.

#### 1. China as the Central Rationale Behind Europe's Indo-Pacific Focus

China stands at the center of Europe's Indo-Pacific turn. Across national strategies, official speeches, and parliamentary debates, Beijing functions as the impetus for European engagement with the region.

While no government frames China as an outright adversary, every European Indo-Pacific document is, to varying degrees, a response to the consequences of Chinese power, including its economic leverage, political influence, and growing maritime assertiveness. In this sense, Europe's Indo-Pacific strategies are essentially about how to manage or hedge against China's rise. This can be seen in many national strategies:

- France's Indo-Pacific strategies, initiated with Macron's 2018 Sydney speech and formalised through the Ministry of Armed Forces' 2019 defence document and the 2021 interministerial strategy, are grounded in the protection of sovereignty, freedom of navigation, and the rules-based maritime order. This reflects both concern over Chinese activities in the South China Sea as well as France's status as a resident Indo-Pacific power through overseas territories such as Réunion and New Caledonia. The French Navy's sustained regional presence and emphasis on strategic autonomy<sup>32</sup> suggest that Paris views challenges to maritime norms as directly linked to the protection of its own territorial and jurisdictional interests.
- The UK adopts a similar logic. The 2021 *Integrated Review* described China as a "systemic competitor," language that was sharpened in the 2023 Refresh, which upgraded this to an "epoch-defining and systemic challenge."<sup>33</sup> The term "systemic" conveys that the challenge is not limited to territorial disputes or

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32. Ministère de l'Europe et des Affaires étrangères, *Indo-Pacific: Key Strategic Points (synthèse)*, 2021, p. 4, 8.

33. UK Cabinet Office, *Global Britain in a Competitive Age: The Integrated Review of Security, Defence, Development and Foreign Policy*, March 2021; UK Cabinet Office, *Integrated Review Refresh 2023: Responding to a More Volatile World*, March 2023.

trade imbalances but extends to the norms and institutions governing global politics. London's security presence in the region, embodied by the HMS *Queen Elizabeth's* 2021 deployment and the AUKUS partnership, seeks to demonstrate alignment with the United States and other like-minded partners in constraining coercive Chinese behavior. Yet even here, Britain calibrates its rhetoric carefully, acknowledging China's "important role" in the global economy.<sup>34</sup>

- Germany frames their Indo-Pacific engagement primarily through the lens of economic security and "de-risking."<sup>35</sup> Berlin's *Policy Guidelines for the Indo-Pacific* (2020) and subsequent *China Strategy* (2023)<sup>36</sup> explicitly identify over-dependence on China as a strategic vulnerability. Rather than military deterrence, Germany's solution lies in diversification, specifically strengthening supply-chain resilience, expanding ties with ASEAN, and protecting critical technologies. For many European countries, the central problem does not seem to be imminent military confrontation with China but the systemic risk of economic coercion. This is a lesson that has been sharpened by China's retaliatory measures against European firms and by Russia's weaponization of energy after the Ukraine invasion.
- Among smaller European states, Lithuania articulates this logic most starkly. Its 2023 *Indo-Pacific Strategy*, which emerged directly from its 2021 diplomatic clash with Beijing over the opening of the Taiwanese Representative Office in Vilnius, highlight a willingness to frame China explicitly as a coercive power. Vilnius' experience of economic retaliation<sup>37</sup> crystallized European awareness of the costs of over-reliance and the need for collective resilience mechanisms at the EU level.
- Taken together, these cases reveal that Europe's Indo-Pacific strategies have a China-centric logic. The Indo-Pacific is used to articulate a broader regional vision while also framing its efforts to reduce dependence on China and demonstrate solidarity with democratic partners. Even the *EU Strategy for Cooperation in the*

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34. UK Cabinet Office, *Integrated Review Refresh 2023: Responding to a More Contested and Volatile World*, March 13, 2023, p. 31.

35. Federal Foreign Office (Auswärtiges Amt), Germany, *Indo-Pazifik-Leitlinien*, August 2020, pp. 6-7; Government of the Netherlands, *Indo-Pacific: Guidelines for strengthening Dutch and EU cooperation with partners in Asia*, November 2020, pp. 4-6.

36. Federal Government of Germany, *Strategy on China of the Government of the Federal Republic of Germany*, 13 July 2023, pp. 6-8.

37. Matthew Reynolds and Matthew P. Goodman, "China's Economic Coercion: Lessons from Lithuania," Center for Strategic & International Studies (CSIS), May 6, 2022.

*Indo-Pacific* (2021) frames its objectives around “building resilient supply chains,” “ensuring maritime security,” and “protecting open and rules-based trade,” each implicitly referencing China’s capacity to disrupt these domains.

## 2. Mismatch Between Threat Perception and Operational Tools

However, there remains a noticeable gap between how European governments describe China and the instruments they are willing to deploy in response. Official strategies increasingly portray the regional environment as more competitive and shaped by systemic rivalry, often linked to concerns about China’s growing influence. Yet the policy response has remained concentrated in economic, diplomatic engagement, and selective security initiatives rather than military commitments. This kind of mismatch reflects both Europe’s limited capacity to project power into the Indo-Pacific and continued political reluctance to become deeply involved in U.S.–China strategic competition.

The contrast is visible in many national documents. The UK’s 2021 *Integrated Review* spoke of “systemic competition” and pledged a tilt toward the Indo-Pacific backed by permanently deployed offshore patrol vessels. By 2023, the Refresh had raised the ambition further, committing with France to establish a “permanent European maritime presence in the region through coordinated carrier deployments.” Britain has since made a second carrier deployment, HMS Prince of Wales led Operation Highmast to the Indo-Pacific in 2025. The sailing of HMS *Queen Elizabeth* through the South China Sea demonstrated solidarity with allies and a post-Brexit global posture, but it did not by itself amount to a sustained regional deterrent presence. Follow-on activities, such as a Littoral Response Group deployment and officer exchanges, remained rotational and limited in scale, shaped by logistical and budgetary pressure.

France, despite possessing territories and forces in the Indian and Pacific Oceans, faces similar limits. Paris’s rhetoric of “sovereignty” and “strategic autonomy” implies an ability to act independently, yet its actual assets are stretched across an immense geography. French naval patrols and joint exercises with Australia, India, or Japan serve primarily political ends. Specifically, these activities allow France to maintain its status as a resident power and demonstrate support for freedom of navigation but are not there to exercise coercive leverage. In essence, French operations function as *presence missions*, not deterrent deployments.

Germany's 2020 Indo-Pacific Guidelines and the deployment of the frigate *Bayern* in 2021 show a similar pattern. The mission marked Germany's return to the region after nearly two decades and represented an effort to show visible presence. At the same time, the deployment remained carefully calibrated. While *Bayern* sailed through the South China Sea and engaged regional partners, it avoided participation in U.S. freedom of navigation operations and other activities likely to be viewed in Beijing as overtly confrontational.<sup>38</sup>

At the EU level, the imbalance is even more pronounced. The 2021 Indo-Pacific Strategy and initiatives like *Coordinated Maritime Presences* use the language of "strategic presence" and "resilience," but tools remain largely civilian: trade and investment rules, development finance, connectivity initiatives (e.g., Global Gateway), and capacity-building.<sup>39</sup> The Coordinated Maritime Presences (CMP) framework in the north-western Indian Ocean enhances maritime situational awareness, but it falls short of a robust security mission.<sup>40</sup>

Several factors sustain this mismatch. First, material constraints: European militaries are overstretched after decades of underinvestment and, since 2022, the war in Ukraine has redirected resources back to Europe's eastern flank.<sup>41</sup> If China is deemed as a military threat to Europe, it will have to divert military resources to address it, something that Europe cannot afford to do at the moment.

Second, institutional fragmentation: the EU lacks a unified defence command and depends on consensus among member states, many of which remain risk-averse about operations far from home. Europe also does not have a European navy and must rely on the voluntary activities of European members.

Third, political calculus: most governments wish to support the U.S. and regional

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38. Bundeswehr, "Indo-Pacific Deployment 2021," August 2, 2021.

39. European External Action Service (EEAS), *EU Strategy for Cooperation in the Indo-Pacific*, September 16, 2021, pp. 4-10.

40. Council of the European Union, "Coordinated Maritime Presences: Council Extends Implementation in the Gulf of Guinea for Two Years and Establishes a New Maritime Area of Interest in the North-Western Indian Ocean," *Council of the EU Press Release*, February 21, 2022.

41. European Defence Agency, *Defence data 2022-2023 Key findings and analysis*, 2023, pp. 6-12.

partners without being perceived as part of an anti-China bloc, which could jeopardize trade relations. Symbolic gestures such as naval visits, strategic dialogues, and training exercises can provide visibility without the risk of escalation.

Regional partners interpret these European moves accordingly. Countries such as Japan, Australia, and India welcome Europe's presence as an expression of normative alignment but view it as supplementary rather than transformative.<sup>42</sup> Many think-tank publications refer to European states' naval deployments as evidence of Europe's growing strategic commitment to the Indo-Pacific.<sup>43</sup> This is indeed true in terms of signalling presence, solidarity with partners, and support for international law.

However, despite the good that such deployments achieve, they also generate some dissatisfaction from both sides in the Indo-Pacific. States wary of major-power confrontation view European ships as contributing to unnecessary tension and raising the risk of escalation.<sup>44</sup> Meanwhile, states that hope Europe would take a firmer line toward China are frustrated that Europe's actions remain largely symbolic and fall short of sustained deterrence or meaningful capability.<sup>45</sup>

In sum, Europe's Indo-Pacific engagement projects strategic engagement but relies primarily on economic, diplomatic, and symbolic tools. This is due to the structural reality that Europe finds itself in, for example, overstretched European militaries, the war in Ukraine, and concerns of actions that might close off economic options with Beijing. Naval deployments are presented as evidence of European commitment to

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42. International Institute for Strategic Studies (IISS), *Asia-Pacific Regional Security Assessment 2023*, pp. 33-35, 70-72.

43. Axel Berkofsky, "All Dressed Up and Somewhere to Go? European Naval Deployments to the Indo-Pacific," *Australian Outlook*, November 13, 2025; Darshana M. Baruah and Veerle Nouwens, "Europe and the Indo-Pacific: New Opportunities for a 'Special' Relationship," *IISS Online Analysis*, International Institute for Strategic Studies (IISS), July 29, 2025; Jihoon Yu, "Europe's Indo-Pacific Ambitions Need a Coherent Strategy," *The Parliament Magazine*, October 9, 2025.

44. Sheryn Lee and Ben Schreer, "Europe and the Indo-Pacific: Evolving Security Engagement," in *AsiaPacific Regional Security Assessment 2022: Key Developments and Trends*, ed. International Institute for Strategic Studies (IISS), 2022, pp. 222-240.

45. Jihoon Yu, "Europe's Indo-Pacific Ambitions Need a Coherent Strategy," *The Parliament Magazine*, October 9, 2025.

regional security but even this is largely symbolic. These actions may not alter the regional balance of power, but they nevertheless reinforce alliance cohesion and uphold the principles Europe seeks to defend. This assessment is not a critique of Europe's efforts as inherently insufficient; rather, it aims to acknowledge the real limits of what is feasible and to provide a diagnosis of where Europe is effective and where gaps remain.

### 3. Focus on Non-Traditional Security Domains

Rather than competing militarily with regional powers, European actors have concentrated on issues such as maritime governance, cyber resilience, climate change, disaster relief, and capacity-building. These fields allow Europe to align with its self-image as a “normative” and “civilian” power and engage the region without becoming embroiled in great-power rivalry.

At the EU level, this approach is clearly articulated in the *EU Strategy for Cooperation in the Indo-Pacific* (2021). The document emphasizes “sustainable and inclusive prosperity,” “green transition,” and “human security” as primary lines of effort, while placing defence and deterrence at the margins. Maritime security cooperation, through the *Critical Maritime Routes Indo-Pacific* (CRIMARIO), the *Coordinated Maritime Presences* initiative in the north-western Indian Ocean, and capacity-building with coastal states, illustrates the approaches that Europe prefers. These are a combination of civilian expertise and confidence-building measures. These initiatives fit comfortably within the EU's legal and institutional parameters, allowing Brussels to act as a provider of public goods rather than a strategic counterweight.

France has used similar instruments to reinforce its regional identity as both a “resident power” and an advocate of rules-based order. Beyond naval presence, Paris emphasizes cooperation on humanitarian assistance and disaster relief (HADR), illegal fishing, and maritime domain awareness.<sup>46</sup> French overseas territories provide opportunities for environmental and oceanographic collaboration, offering a functional rather than confrontational way to engage regional partners.<sup>47</sup> This framing enables France

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46. Ministère de l'Europe et des Affaires étrangères, *Indo-Pacific: Key Strategic Points (synthèse)*, 2021, pp. 10-12.

to maintain relevance while avoiding the perception of militarization that often accompanies U.S. or Chinese deployments.

Germany and the Netherlands have likewise prioritized connectivity, resilience, and sustainability. Their Indo-Pacific Guidelines frame climate policy, digital governance, and supply-chain diversification as security issues, reflecting a European tendency to merge functional and strategic concerns.<sup>48</sup> The Franco-German Alliance for Multilateralism,<sup>49</sup> an informal network launched in April 2019 to coordinate willing states around shared governance goals, and the Netherlands' advocacy for stronger EU digital connectivity with ASEAN,<sup>50</sup> show how Europe responds to geopolitical rivalry by building institutions rather than deploying force. These initiatives aim to uphold the “open” in “free and open Indo-Pacific,” but through governance rather than force.

The UK, after Brexit, has experimented with a blend of hard and soft engagement. While its “tilt” toward the Indo-Pacific featured high-profile defence deployments, London has also placed emphasis on cyber cooperation, climate adaptation, and maritime capacity-building with small island states.<sup>51</sup> These areas dovetail with its

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47. France is the only EU member state with 1.6 million citizens and 93% of its exclusive economic zone (EEZ) located in the Indo-Pacific. French territories (Polynesia, New Caledonia, Réunion, Mayotte) enable scientific diplomacy and environmental cooperation, which Paris frames as a non-militarized, stabilizing presence. The strategy repeatedly stresses that France's legitimacy derives from being a resident Pacific nation, not an external power-seeking confrontation.

48. German Federal Government, *Guidelines for the Indo-Pacific Region*, December 2022, pp. 2-4; Government of the Netherlands, *Indo-Pacific: Guidelines for strengthening Dutch and EU cooperation with partners in Asia*, November 2020.

49. The Alliance for Multilateralism (A4M), launched by Germany and France in 2019, is a diplomatic initiative to strengthen international rules, digital norms, climate governance, and multilateral problem-solving. By 2022, A4M was linked to Indo-Pacific connectivity, cyber norms, digital governance, supply-chain transparency, and climate resilience, making it a core instrument of its Indo-Pacific engagement. For the relevant documents, see: Federal Foreign Office (Auswärtiges Amt), Germany, “Alliance for Multilateralism,” February 24, 2021.

50. European Union and ASEAN, *ASEAN-EU Commemorative Summit 2022: Joint Leaders' Statement*, December 14, 2022.

51. UK Cabinet Office, *Integrated Review Refresh 2023: Responding to a More Contested and Volatile World*, March 2023, pp. 28-31.

development and Commonwealth policy tools, allowing the UK to sustain a presence with relatively modest resources.

This orientation reflects normative preferences and structural constraint. Normatively, Europe's external identity has long been built around the promotion of multilateralism, development, and environmental stewardship. Structurally, the redirection of defence spending toward Ukraine limit what European militaries can contribute to the Indo-Pacific region. Functional cooperation, therefore, provides a politically safe middle ground, where it allows Europe to appear engaged, uphold liberal norms, and cultivate partnerships without directly confronting China or committing to sustained power projection.

#### 4. Post-Ukraine War Constraints and Updated Indo-Pacific Strategies

Russia's full-scale invasion of Ukraine in 2022 has profoundly altered Europe's strategic landscape. Europe's threat perceptions have been reordered to place Russia as its primary security concern. Subsequently, resources have been redirected to address Russia's threat, and have led to a reclassification of the importance of the Indo-Pacific and how many resources can be allotted to the region.

The most immediate consequence of the Ukraine war was the rapid militarization of Europe's eastern flank, requiring sustained investments in ammunition stockpiles, air defence, heavy armor, and logistics. Countries such as Germany, Poland, the Baltic states, and the Nordics dramatically increased defence spending.<sup>52</sup> Furthermore, NATO members shifted maritime and air assets toward deterrence missions in Europe.<sup>53</sup> Put

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52. Stockholm International Peace Research Institute (SIPRI), *Trends in World Military Expenditure 2023*, April 2024, pp. 6-10.

53. The UK redeployed naval and air assets to NATO tasks; strengthened forward presence in Estonia; intensified air policing and maritime patrols in the North Atlantic and High North, while France reinforced NATO air policing, troop presence in Romania, and maritime assets in the Mediterranean and North Atlantic, reducing available capacity for Indo-Pacific projection. For the relevant documents, see: Claire Mills and Louisa BrookeHolland, *NATO: Reinforcing its eastern flank*, Research Briefing CBP9450, House of Commons Library, October 13, 2025; International Institute for Strategic Studies (IISS), *The Military Balance 2023*, February 15, 2023, pp. 43-45, 52-54.

another way, the war in Ukraine consumed the strategic bandwidth required for a sustained Indo-Pacific posture.

This re-prioritization is now reflected in a series of updated Indo-Pacific strategies across Europe. The UK's *Integrated Review Refresh (2023)* acknowledged that the primary threat environment had shifted decisively to Europe's neighborhood, even as it reaffirmed the Indo-Pacific "tilt." The language in the 2023 Review noted that much of the promises of the 2021 Tilt had already been delivered.<sup>54</sup>

Meanwhile, France's updated posture emphasized partnerships and presence rather than expanded deployments.<sup>55</sup> Germany's 2023 China Strategy and subsequent ministerial speeches openly recognized that expectations for German military activity in the Indo-Pacific must be calibrated.<sup>56</sup> Across these documents, the subtext is that Europe cannot simultaneously, at least for the time being, address countering Russia's threat on the European continent and a hardening of strategic competition with China in the Indo-Pacific.

A second factor reinforcing this recalibration is the United States' own signalling. Washington has long encouraged European burden-sharing in Europe itself.<sup>57</sup> Particularly under the second Trump administration, U.S. officials have indicated that they prefer Europe to remain focused on deterring Russia and stabilizing the Euro-Atlantic area, rather than diluting capabilities across distant theatres.<sup>58</sup> While Washington welcomes political solidarity in the Indo-Pacific, it has shown little expectation that Europe meaningfully shape the regional balance of power. For European governments, this is sending unclear signals in that the Indo-Pacific is viewed as strategically important, but the U.S. discourages large-scale European involvement there.

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54. UK Cabinet Office, *Integrated Review Refresh 2023: Responding to a More Contested and Volatile World*, March 13, 2023, pp. 7-9.

55. Ministère des Armées, France, *France's Indo-Pacific Strategy 2025*, July 2025.

56. German Federal Government, *Strategy on China*, July 13, 2023.

57. Paul Belkin, *NATO: Key Issues for the 117th Congress*, Congressional Research Service (CRS), March 3, 2021.

58. Ben Schreer, *More or Less? European Defence Engagement in the Indo-Pacific in the Second Trump Administration*, International Institute for Strategic Studies (IISS), June 4, 2025, p. 5.

## 5. South Korea's Marginal Presence in European Strategies

Despite South Korea's growing strategic and economic profile, it remains notably marginal in most European Indo-Pacific frameworks. When European governments identify priority partners, they consistently emphasize Japan, Australia, India, and ASEAN. South Korea, by contrast, occupies a secondary category. South Korea is acknowledged as a valued democratic actor, but rarely given substantive roles within Europe's regional plans.

The primary reason for Seoul's limited visibility is Europe's China orientation. Because European Indo-Pacific strategies are largely constructed around managing China's rise rather than shaping the region holistically, European governments gravitate toward partners whose strategic narratives most clearly link domestic interests to China policy. Japan and Australia anchor the "frontline" of balancing behavior; India provides an alternative pole of influence; while ASEAN represents the diplomatic center of regional multilateralism. South Korea, however, does not easily fit into any of these categories. Its strategic posture toward China is more calibrated, more variable across administrations, and less easily translated into a stabilizing anchor for European messaging.

Institutional familiarity also plays a role. Europe's security architecture places considerable emphasis on established groupings, such as EU-ASEAN dialogues. South Korea does not have equivalent institutional depth with Europe, despite growing ties.

The paradox is that bilateral cooperation between South Korea and individual European states has quietly become one of the more substantive security relationships in the region. Defence-industrial ties are expanding rapidly: Poland's landmark procurement deals for K2 tanks, K9 howitzers, and FA-50 aircraft have brought unprecedented depth and visibility to South Korea's defence footprint in Europe.<sup>59</sup> Cybersecurity cooperation between South Korea, the UK,<sup>60</sup> and the Netherlands,<sup>61</sup> alongside green-

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59. Jaroslaw Adamowski, "Poland Doubles Down on South Korean Tanks with \$6.5 Billion Deal," *Defense News*, August 1, 2025.

60. United Kingdom, *UK-Republic of Korea Strategic Cyber Partnership*, Foreign, Commonwealth & Development Office, Prime Minister's Office, 10 Downing Street, and The Rt Hon Rishi Sunak MP, November 23, 2023.

tech collaboration with Germany,<sup>62</sup> demonstrates Korea's growing strategic profile. South Korea is also working closely with NATO's Cooperative Cyber Defence Centre of Excellence, reflecting its growing role in transatlantic cyber resilience efforts.<sup>63</sup> In addition, South Korea and the EU held their first-ever Defence and Security Dialogue in November 2025,<sup>64</sup> signalling a significant upgrade in institutional engagement following the conclusion of the Security and Defence Partnership concluded in 2024.<sup>65</sup> At the NATO Summit, Special Envoy Wi Sung-lac delivered a letter from President Lee Jae Myung underscoring Seoul's interest in deepening cooperation with NATO, particularly in areas such as cyber, emerging technologies, and supply-chain security.<sup>66</sup>

These relationships, however, have mostly grown outside the Indo-Pacific strategies of these states and are framed more as bilateral cooperation. European countries and South Korea engage with each other to mutual functional benefit, but rarely frames this within a larger Indo-Pacific approach. Both sides highlight partnerships that reinforce the image of alignment with the United States and the "like-minded democracies." However, South Korea is not as integrated into Europe's Indo-Pacific strategies at the regional level. South Korea's omission is not so much a judgment on South Korea's importance for Europe, but rather, it is more a sign of Europe's conceptualization of the Indo-Pacific which is anchored to China management, not comprehensive regional engagement.

For South Korea, selective bilateral engagement with individual European countries, rather than anchoring cooperation within a region-wide European framework, is not

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61. Seung-yeon Kim, "S. Korea, Netherlands discuss cooperation in emerging security challenges," *Yonhap News Agency*, November 11, 2025.

62. Chulhyun Kim, "Expansion of Korea-Germany Climate Tech and New Energy Industry Technology Exchange Cooperation," *The Asia Business Daily*, July 16, 2024.

63. He-rim Jo, "South Korea's intelligence agency joins NATO's cyber defense center as first in Asia," *The Korea Herald*, May 5, 2022.

64. Seung-yeon Kim, "S. Korea, EU hold inaugural dialogue on security and defense," *Yonhap News Agency*, November 13, 2025.

65. European External Action Service (EEAS), *Security and Defence Partnership between the European Union and the Republic of Korea*, November 4, 2024.

66. Eun-jung Kim, "S. Korea, NATO agree to establish consultative body on defense industry," *Yonhap News Agency*, June 26, 2025.

inherently disadvantageous. It allows Seoul to focus on issue areas of highest priority and avoid being drawn into European debates that do not directly serve its interests, such as internal EU strategic autonomy disputes or burden-sharing politics.

At the same time, selective bilateralism carries risks when it remains disconnected from Europe's broader regional strategizing. For example, Seoul may find itself excluded from emerging conversations that directly affect its security, such as discussions about simultaneous contingencies in Europe and East Asia. As Europe expands its own conceptualizations of transregional security, South Korea would be better served by being present in these discussions early, in order to shape European thinking and to ensure that its own priorities are integrated into evolving Euro-Atlantic frameworks.

## IV. Implications

The above patterns reveal two implications for Europe's role in the Indo-Pacific and for how partners like South Korea should interpret them. First, Europe's influence will continue to be exercised primarily through governance instruments rather than military means. Second, its regional activism will be both enabled and constrained by the United States.

### 1. Europe as a Governance Actor

Europe's advantage in the Indo-Pacific lies in governance rather than force projection. Its influence is exercised primarily through rule-making, standard-setting, regulatory alignment, sanctions implementation, export controls, and connectivity initiatives. This reflects both material constraints and the political priorities of European governments. Even in strategies that adopt a more critical view of Beijing, China is generally framed as a diplomatic, economic, and technological challenge rather than a military adversary. As a result, trade regulation, technology screening, investment controls, maritime capacity-building, cyber governance, climate policy, and connectivity finance are likely to shape Europe's Indo-Pacific role far more than occasional naval deployments.

This has three consequences. First, Europe's military or security role will be marginal in the Indo-Pacific. Presence missions and joint exercises will continue, but their purpose is to signal solidarity rather than to deter. Second, Europe can wield influence by shaping the rules that govern trade, data, platforms, critical raw materials, green tech, shipping, and finance.<sup>67</sup> Third, European initiatives will increasingly tie market access, investment, development finance, and standards cooperation to governance expectations, including supply-chain transparency, human-rights due diligence, or cybersecurity baselines.

The finding of this report is not that Europe is irrelevant to security, but that it contributes to security in ways that differ from those of the United States. Maritime

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67. Anu Bradford, *The Brussels Effect: How the European Union Rules the World*, Oxford Academic, December 19, 2019, pp. 3-6, 24-27; James Tamim, "The Brussels Effect and the GDPR: EU Institutions as Catalysts for Global Data Protection Norms," *European Digital Policy Initiative*, June 17, 2024.

domain awareness initiatives, coast guard training, sanctions enforcement, and export controls on dual-use technologies all have tangible security effects despite relying primarily on regulatory and institutional mechanisms. The same applies to efforts to strengthen resilience in supply chains for semiconductors, batteries, medical goods, and critical minerals, where screening mechanisms, procurement rules, and diversification policies play a central role. This helps explain why even some of Europe's more forward-leaning positions on China, such as Lithuania's, remain embedded within broader EU economic and regulatory frameworks rather than being expressed through military alignment.

## 2. U.S. Influence

European engagement in the Indo-Pacific mirrors U.S. framing in important respects (systemic competition with China, supply-chain resilience, technology protection, and the centrality of sea-lane security) yet it also reflects distinct European interests and risk calculations. The war in Ukraine and the uncertainties surrounding U.S. policy, especially under the second Trump administration, have produced a tricky situation in that Europe wants to act globally and hedge against over-dependence on Washington, but the practical scope for autonomous Indo-Pacific activism remains limited.

On the one hand, U.S. leadership empowers Europe's Indo-Pacific role. For example, when aligned, U.S. agenda-setting also accelerates European governance initiatives, from outbound investment screening to semiconductor cooperation, by framing them as collective resilience. In this sense, alignment with Washington multiplies Europe's normative power.

At the same time, U.S. preferences constrain Europe's bandwidth. Washington has repeatedly signalled that it values European concentration on the Euro-Atlantic theatre. Especially in the current context, the United States prefers more Europe in Europe rather than stretching to Asia. This shapes European choices in two ways. First, it narrows the military options: European states are reluctant to commit platforms to the Indo-Pacific that might be needed for NATO contingencies. Second, it encourages a division of labor whereby Europe emphasizes governance, finance, and capacity-building while the United States and regional allies carry the coercive burden.

The result is partial autonomy. Europe can diverge from the U.S. at the margins, for

example, maintaining channels with China, prioritizing de-risking over decoupling, emphasizing climate cooperation, or advancing EU-ASEAN connectivity, but these moves remain bounded by the transatlantic relationship. This leads to an arrangement where, when U.S. and European priorities align, Europe's Indo-Pacific engagement can accelerate; and when they diverge, Europe defaults to caution, especially where industrial stakes are high or escalation risks are non-trivial.

For regional partners, this sends two messages. First, European commitments in the Indo-Pacific are credible when they are nested within U.S.-compatible frameworks, such as joint statements on technology resilience, coordinated sanctions, shared cyber norms, or trilateral initiatives with U.S. participation. Second, moments of U.S. political uncertainty (e.g., election cycles or shifts in executive priorities) will trigger European hedging, not abandonment of the region, but a tilt toward lower-risk, governance-centric projects.

For Europe itself, partial autonomy is a structural reality and the way that Europe can act globally while still prioritizing the European theatre. In the context of the protracted war in Ukraine, the more Europe invests in Ukraine-related deterrence and defence industrial capacity at home, the more it must rely on non-military instruments abroad.

## V. Recommendations

### 1. For Europe

#### 1) Avoid Over-Centralization Within the EU

The EU's Indo-Pacific engagement works better as a coordinating framework than as a unified foreign policy position. Trying to produce a single Brussels line on the Indo-Pacific exposes the genuine differences between member states, for example, on China, on how much distance to put between European and U.S. priorities, and tends to produce documents that might over commit or deliver too little.

Instead, the EU should:

- Provide overarching principles (e.g., commitment to rules-based order, open sea lanes, and resilience), while letting smaller groups of member states move faster on specific issues.
- Resist one-size-fits-all pledges, such as promises of a “permanent” Indo-Pacific naval presence that only a handful of states can realistically sustain;
- Publish an “Indo-Pacific tasking map” that clarifies which member states lead which strands of work (maritime governance, illicit finance, cyber, connectivity, etc.), including indicative resources and timelines.

#### 2) Focus Where Europe Adds Value

Europe should concentrate on domains where its instruments are strongest and partners' needs are greatest, rather than striving for universal visibility. Areas where Europe excels and where the focus should be include:

- Maritime governance and freedom of navigation: Expand CRIMARIO and CMP as platforms for information-sharing, and best practices against illegal, unreported, and unregulated (IUU) fishing, and clearer SOPs for ship-to-ship transfers and port-state controls.<sup>68</sup>
- Illicit finance and sanctions enforcement: Develop an EU Indo-Pacific illicit-finance with regional financial intelligence units. This mechanism should target

Democratic People’s Republic of Korea (DPRK) and Russia-related sanctions-evasion networks and track front companies, beneficial owners, and high-risk intermediaries, many of which operate through Indo-Pacific hubs.<sup>69</sup>

- Cyber and digital governance: Establish an EU Indo-Pacific cyber “helpdesk” to support incident response, ransomware tracing, and capacity-building for Computer Emergency Response Teams (CERTs). Use the EU’s regulatory weight to drive up cybersecurity standards among regional partners in critical infrastructure, while there is still space to shape what those standards look like.<sup>70</sup>

### 3) Build Targeted Partnerships and Utilize the NATO-IP4 Framework

Europe cannot sustain deep engagement with every Indo-Pacific partner. It should adopt a selective, problem-driven partnership strategy, focusing on partners whose capabilities and interests align with specific workstreams. Europe should also aim to

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68. Europe’s most credible contribution to Indo-Pacific security lies in maritime governance, where the EU already possesses well-developed instruments, operational experience, and durable partnerships. Rather than depending on episodic naval deployments, Europe should reinforce the capabilities that Indo-Pacific states consistently prioritize: maritime domain awareness (MDA), information fusion, law-enforcement training, and technical capacity-building. The Coordinated Maritime Presences (CMP) in the north-western Indian Ocean, designed to enhance information sharing, SOP harmonization, and naval interoperability, provides a viable framework for broader Indo-Pacific cooperation. As a non-combat, governance-centric mechanism that institutionalizes data fusion and cooperation with coastal states, CMP aligns closely with Europe’s comparative strengths and can be effectively adapted for broader Indo-Pacific application. For the relevant documents, see: European External Action Service (EEAS), *CRIMARIO II – Critical Maritime Routes Indo-Pacific Project*, February 8, 2024; European External Action Service (EEAS), *Coordinated Maritime Presences*, March 2022.

69. Multiple authoritative reports show that North Korean and Russia-linked networks operate extensively through Southeast Asia, Hong Kong, Singapore, and other Indo-Pacific jurisdictions. Europe already enforces stringent anti-money laundering (AML) and countering-the-financing-of-terrorism (CFT) rules; extending these through a structured partnership would both strengthen Indo-Pacific governance and directly support European interests.

70. Given that North Korea has become the world’s most prolific state-sponsored cryptocurrency thief and China’s cyber operations routinely target supply chains and critical infrastructure, a structured EU Indo-Pacific cyber governance mechanism would reinforce shared resilience and align regional partners around high-standard regulatory norms.

bolster the NATO-IP4 framework which is currently being underutilized.<sup>71</sup>

- Use NATO-IP4 as Europe's primary security arena with the Indo-Pacific: Europe should consolidate its Indo-Pacific security engagement through NATO-IP4 rather than dispersing efforts across numerous bilateral or EU-driven channels. NATO-IP4 can reduce duplication and ensure that Europe's limited resources are directed toward partners with aligned capabilities and interests.
- Institutionalize dialogue and decision-making structures: Europe should anchor an annual NATO-IP4 Defence Ministers' Meeting to the NATO Defence Ministerial, building on the first such meeting held in October 2024,<sup>72</sup> and support the creation of a NATO-IP4 Consultative Council. These structures would provide predictable high-level engagement and ensure that agenda-setting and follow-up do not depend on summit sidelines or shifting political calendars.
- Create supporting mechanisms for sustained cooperation: A small NATO-IP4 Coordination Unit within NATO Headquarters, paired with staff secondments between NATO bodies and IP4 ministries, for example, would preserve institutional memory and embed habits of cooperation at the working level across both regions.
- Develop shared analytical and operational tools: Europe should champion an Annual NATO-IP4 Transregional Threat Assessment covering hybrid threats, North Korea-Russia cooperation, China's grey-zone activities, cyber risks, and sanctions-evasion networks.
- Plan long-term transregional exercises and coordinated summitry: Europe should support synchronizing an annual IP4 leaders' meeting with the NATO Summit and commit to a 5-10 year roadmap for NATO-IP4 maritime exercises, cyber drills, MSCT coordination, and tabletop planning for dual contingencies. This embeds cooperation into national planning cycles and signals durable strategic commitment across both regions.

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71. Ira Straus and Francis Shin, "How to Institutionalize NATO's Cooperation with Its Closest Pacific Partners," *Atlantic Council - New Atlanticist*, July 19, 2024.

72. Jakub Bornio, "NATO defence ministers meet their Indo-Pacific counterparts: Towards a global alliance?", *IEŚ Commentaries*: 1234 (209/2024), October 31, 2024.

## 2. For South Korea

### 1) Link North Korea to China-Related Governance Issues

For many European governments, North Korea does not register as a pressing threat because the Korean Peninsula is currently “at peace” in the narrow military sense, in that there are no large-scale hostilities, and the U.S.-ROK alliance is viewed as stable. As a result, Europe tends to compartmentalize North Korea as a human-rights and non-proliferation issue rather than as a persistent strategic challenge. This limits the traction Seoul can gain when emphasizing military deterrence, ballistic-missile threats, or conventional threat dynamics. To overcome this gap, South Korea should present North Korea’s behavior not as a stand-alone regional problem, but as part of the broader governance challenges that also preoccupy Europe in relation to China.

This reframing is grounded empirically. Pyongyang’s illicit financing networks, including shell companies, cyber theft, cryptocurrency laundering, and front-company logistics,<sup>73</sup> operate through the same opaque global channels that Europe seeks to regulate for reasons entirely unrelated to Korean security. The same is true of North Korea’s arms transfers to Russia and its maritime sanctions-evasion practices, including ship-to-ship transfers and the concealment of North Korean participation in offshore fishing networks, both of which exploit weak transparency and enforcement at sea.<sup>74</sup> South Korea should therefore:

- Propose joint investigative projects and training with European agencies on financial forensics, cryptocurrency tracing, and beneficial-ownership transparency;
- Advocate expanded cooperation on maritime monitoring, integrating South Korean satellite capabilities with EU platforms such as CRIMARIO and EMSA;
- Emphasize that reinforcing sanctions implementation and tackling DPRK-related illicit networks strengthens the same governance systems Europe needs to manage China and Russia.

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73. U.S. Department of the Treasury, *Treasury Disrupts North Korean Digital Assets Money Laundering Network*, December 17, 2024.

74. “South Korea sanctions HK firm for illegal transfer of North Korea coal,” *Reuters*, July 18, 2024.

Such framing aligns South Korea's priorities with Europe's strengths. It reframes North Korea not as a distant security problem, but as a stress test of the very governance mechanisms that underpin Europe's China policy, illicit finance, sanctions compliance, cyber stability, and maritime transparency. That alignment will yield more reliable and sustained cooperation than trying to convince Europe to view the Korean Peninsula through a hard-security lens it does not naturally adopt.

## **2) Complement Existing Bilateral Ties with Europe and Engage Through Region-wide Frameworks**

South Korea currently enjoys strong bilateral ties with individual European states. However, this cooperation remains disconnected from Europe's Indo-Pacific strategies, which continue to be largely reputational and symbolically China-focused. This fragmentation poses risks in that European states may engage selectively or overlook South Korean priorities when framing their own Indo-Pacific policies.

To mitigate these risks, South Korea should complement the issue-specific bilateralism and work to embed its cooperation within Europe's region-wide strategic processes. One platform for doing so is the NATO-IP4 framework, which links European and Indo-Pacific security thinking.

South Korea should therefore:

- Use the NATO-IP4 framework as the primary channel for shaping Europe's Indo-Pacific thinking: This creates a structured venue where South Korean perspectives on North Korea, China-Russia alignment, maritime stability, and cyber threats can be integrated into Europe's collective strategic debates—rather than dispersed across bilateral dialogues that lack continuity.
- Promote a transregional framing of North Korea's behavior tied to Europe's governance and regulatory interests: By linking DPRK sanctions evasion, cybercrime, illicit finance, and arms transfers to Russia to the same systems Europe uses to manage China and global illicit networks, South Korea ensures that North Korea is treated as a strategic governance problem and not merely a distant security issue.
- Coordinate with coalitions of capable European states on specific Indo-Pacific issue areas within a regional framework: Rather than creating new bilateral

initiatives, Seoul should work with European actors already active in the Indo-Pacific (France, UK, Germany, Netherlands, Nordics) through mechanisms aligned with NATO or coalition formats, ensuring that South Korean engagement reinforces Europe's regional approach.

## VI. Conclusion

Europe's engagement with the Indo-Pacific has become increasingly visible over the past five years. Governments have published Indo-Pacific strategies, naval vessels have deployed to the region, and both the EU and individual states have expanded diplomatic, economic, and security cooperation with regional partners. Yet the scale of this engagement remains limited when measured against the region's security challenges and the competing demands generated by Russia's war against Ukraine.

European involvement in the Indo-Pacific is driven largely by concerns about China, the desire to support partners and allies, and a broader interest in demonstrating that Europe remains a global actor. However, these objectives have not translated into a substantial military role. Instead, European engagement has relied primarily on diplomacy, economic instruments, and occasional military deployments rather than a sustained security presence.

National strategies differ in emphasis but point in a similar direction. France highlights sovereignty and freedom of navigation, the United Kingdom focuses on systemic competition, Germany emphasizes de-risking and technological resilience, and Lithuania has adopted a more confrontational position toward Beijing. Despite these differences, their policy responses remain broadly similar. Naval deployments have been limited and intermittent, while much of Europe's activity has centered on trade regulation, investment screening, maritime capacity-building, sanctions, and connectivity initiatives.

Russia's full-scale invasion of Ukraine widened this gap between rhetoric and capability by prioritizing Europe's security focus back to its own periphery and limiting political space for ambitions in the Indo-Pacific. The subsequent update version of several Indo-Pacific strategies is, in effect, an acknowledgment of limits: there is more selective engagement and emphasis on functional contributions over forceful posture. U.S. preferences also reinforce this calibration. Washington welcomes European solidarity in the Indo-Pacific but prefers "more Europe in Europe."

These constraints shape not only what Europe does, but also whom it engages. The absence of South Korea in many European strategies is symptomatic of a China-first

mental map and of institutional habit. To elaborate, Japan, Australia, India, and ASEAN fit familiar templates, while South Korea, despite formidable capabilities, often enters European policy via bilateral, functional lanes rather than as a central strategic partner. That omission carries costs for both Europe and South Korea in that it risks cementing an Indo-Pacific approach in the West that over-emphasizes major-power dynamics at the expense of middle-power agency.

Against this backdrop, the report's implications are the following. First, Europe's advantage in the Indo-Pacific is governance: standard-setting, sanctions and export-control enforcement, illicit-finance disruption, cyber and data rules, maritime law, and due-diligence regimes. These tools, while rarely dramatic, generate durable effects precisely because they are enforceable. Second, Europe's regional activism will remain nested within U.S. strategy. This does not render Europe irrelevant or that its security efforts are redundant. It clarifies where Europe is likely to be most useful and where expectations should be tempered.

The recommendations follow from those premises. For Europe, avoid over-centralization that produces lowest-common-denominator policy; focus on the problems where it can exercise its expertise in governance arenas and build targeted partnerships. Within this approach, Europe should make greater use of the NATO-IP4 framework, which is currently underutilized yet uniquely positioned to reduce duplication and anchor Europe's Indo-Pacific engagement in a sustainable, transregional structure. Strengthening NATO-IP4 ministerial dialogue, establishing a consultative council, investing in shared threat assessments, and developing long-term exercises would help Europe move from episodic visibility toward structured strategic impact.

For South Korea, the task is to reframe North Korea not as a distant military issue but as part of the governance challenges, including illicit finance, sanctions evasion, cybercrime, etc., that also underpin Europe's China policy. At the same time, Seoul should complement existing bilateral cooperation with a more region-wide strategy aimed at embedding South Korean priorities within Europe's emerging Indo-Pacific frameworks. The NATO-IP4 platform offers an effective channel for this: it enables South Korea to shape Europe's strategic debates, integrate South Korean threat assessments into transregional planning, and work with coalitions of capable European states within a coherent institutional setting.

**A S A N**  
R E P O R T

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Limits and Pathways for Cooperation

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