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Getting them on board

Partners and avenues for European engagement in Indo-Pacific maritime security

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Executive Summary

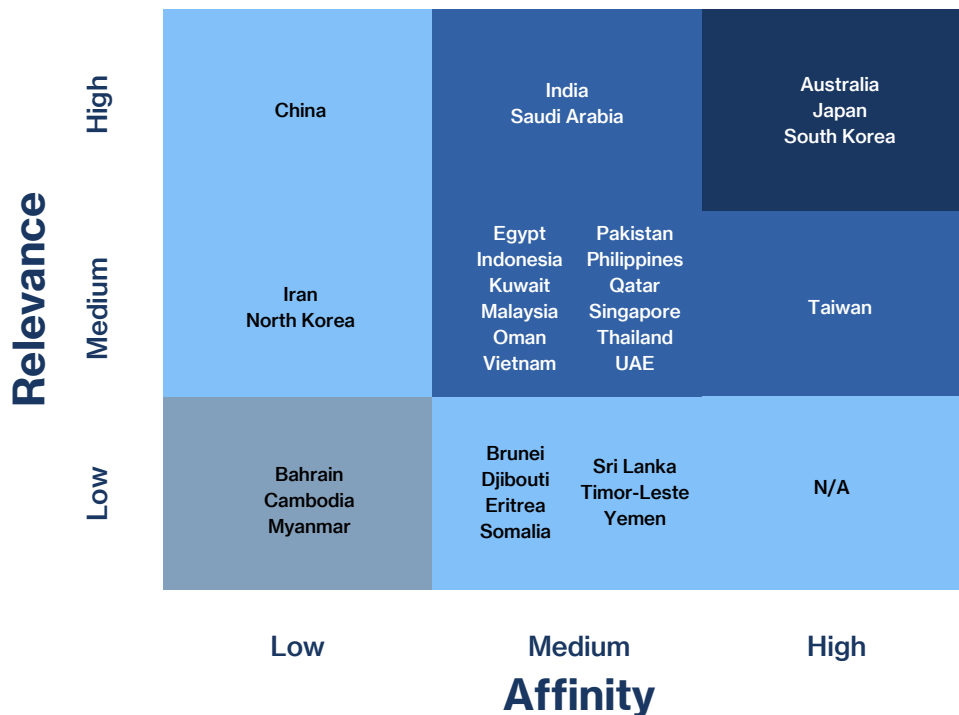
The Indo-Pacific is the region where most of the key geopolitical and geoeconomic trends converge, and with the greatest risk of combustion as the Sino-American competition intensifies. Trade between the European Union and Asia represents the lion's share of the global economy and nearly all of it moves over water. Sea lines of communication run through chokepoints such as the Suez Canal, the Straits of Bab el Mandeb, Hormuz, and Malacca, as well as through the East and South China Sea with their territorial disputes. These waterways face a range of threats that include interstate war, littoral state conflict, intrastate conflict, terrorism, piracy, and climate change related disasters. Small and middle powers in Europe and in the Indo-Pacific have profound shared interests in keeping these chokepoints secure.

Yet, European capabilities are limited due to the geographical distance to maritime bottlenecks and the constraints that Russia's invasion of Ukraine imposes upon European military and other resources. *European states must therefore invest in relationships with states across the region to bolster maritime security.* Doing so could strengthen the multilateral maritime order, based on commonly agreed upon rules. Furthermore, given the varied national interests and perspectives, cooperation between European and Indo-Pacific states is not automatic.

This brief thus investigates both *how* and *with whom* Europeans can strengthen their engagement in the Indo-Pacific. It does so in two steps: (1) it orders Indo-Pacific states according to capacity and affinity to gauge with whom Europeans could best collaborate to strengthen a multilateral maritime order; and (2) it looks across policy domains at a selection of Indo-Pacific states to see the relative strengths and weaknesses of European states in their bilateral relationships, particularly in comparison to the United States and China.

The assessment in the first section is based on three components. First, the geographical distance of Indo-Pacific states to key maritime chokepoints, as the closer a state is to a chokepoint, the easier it will be for it to deploy capabilities to defend its openness. Second, the values and ideas that states close to Indo-Pacific chokepoints share with Europeans, as holding common beliefs is conducive to cooperation that benefits both partners. And third, Indo-Pacific states' military capacity to contribute to safeguarding open passage through chokepoints, since proximity and affinity do not automatically translate into willingness to provide maritime security. As summarised in Figure 1, the assessment groups the Indo-Pacific states located in proximity of maritime chokepoints into four tiers that describe their suitability for cooperation with Europe to ensure maritime security: (1) *Close and powerful partners*, (2) *Potential spoilers*, (3) *Inbetweeners*, and (4) *Limited gains, limited losses*.

Figure 1. Matrix plotting the assessment of selected Indo-Pacific states according to international affinity and maritime security relevance



Close and powerful partners are states with which European countries share many values, and which have the capacity to act. These are Australia, Japan, and South Korea. All three have navies capable of regional-power projection; they are also liberal democracies, and consequently share Europe's concerns on protecting human rights and maintaining an order backed by international rules and norms. With these partners, collaboration is most straightforward, and indeed, Europe already frequently engages with all three through strategic partnerships and dialogues, as well as joint naval exercises.

In contrast, *potential spoilers* of a multilateral maritime order based on rules are states with which Europe has little affinity in terms of values, but which do have the capacity to undermine maritime security. China stands out among these states; with its growing multi-domain military capabilities, it has the capacity to challenge US hegemony in the Western Pacific. North Korea and Iran can threaten shipping lanes with both missiles and their navies. Brunei, Eritrea, Somalia, Sri Lanka, Timor-Leste, and Yemen have scarce military capacities and very limited diplomatic and political influence. None of these countries would make suitable cooperation partners for Europe.

Another group holds little potential as partners for maritime security. Bahrain, Cambodia, and Myanmar are non-democratic countries with limited military capacities. Whichever way they lean, the *gains and losses remain limited*.

The biggest group, finally, consists of states that have the capacity to (re)shape maritime security, but with which Europeans do not have automatic affinity in terms of values: *the inbetweeners*. With this group, much can be won or lost in terms of promoting a multilateral maritime order based on rules. At the same time, these inbetweeners states might look to

Europe as a more neutral partnering alternative as they are caught in between the Sino-American great power competition. India and Saudi Arabia are the two highly capable states that fit this category. While they have mixed affinity with Europe in terms of values, both are capable of regional deterrence, and diplomatically active in the region. Especially India has a strategic position at the centre of the Indo-Pacific. A second, more varied group of states within this group has medium capacity to contribute to or undermine maritime security on or near chokepoints; it includes Egypt, Indonesia, Kuwait, Malaysia, Oman, Pakistan, the Philippines, Qatar, Singapore, Thailand, the UAE, and Vietnam. Although most of these states are non-democratic, they are often the ones most closely located next to chokepoints and they all have some maritime capacity. Due to the inbetweeners' strategic positions, military capabilities, and limited value affinity, Europe cannot ignore them as cooperation partners.

Inbetween states are most interesting to Europe as potential cooperation partners since they hold much potential to shape maritime security. The second part of the brief hence offers a structured breakdown of the bilateral relationships between India, Indonesia, the Philippines, Thailand, the United Arab Emirates, and Vietnam on the one hand, and the Netherlands, France, Germany, the UK, Italy, Spain, and the European Union on the other. We assessed the bilateral ties in the fields of security and intelligence; trade and investment; and capacity and infrastructure. This shows where collaboration is already well-developed and where it is lacking, clarifying where to strengthen engagement. Investigating different European states simultaneously outlines avenues for a division of labour among them. The analysis finally contrasts Europe's bilateral ties with those of China and the United States to get a sense of relative strengths and weaknesses.

The European countries under investigation strongly vary in the intensity of their bilateral relations. Only France and the United Kingdom have serious defence, security, and intelligence ties with Indo-Pacific countries. Even though Germany and the Netherlands lack such engagement, they have well-developed relations on trade and investment, with the Netherlands also being strong on capacity-building and infrastructure development (as is France). Finally, Italy and Spain, despite stating the growing importance of the Indo-Pacific, currently fail to make serious inroads into engagement with regional states.

Unsurprisingly, European involvement in the Indo-Pacific pales compared with China and the United States, whether in terms of security and intelligence (the United States), trade and investment (the United States and China), or capacity-building and infrastructure (the United States). Only when we consider the EU as a whole are its trade and investment relations with the Indo-Pacific states comparable in intensity to those of the United States and China. The only exception to Europe's generally weaker ties are its well-developed relations with India. The relative strengths and weaknesses in bilateral relations are summarised in Figures 2,3 and 4.

Figure 2. Overview of bilateral relations in capacity building and infrastructure between selected Indo-Pacific countries with European states, China, and the United States

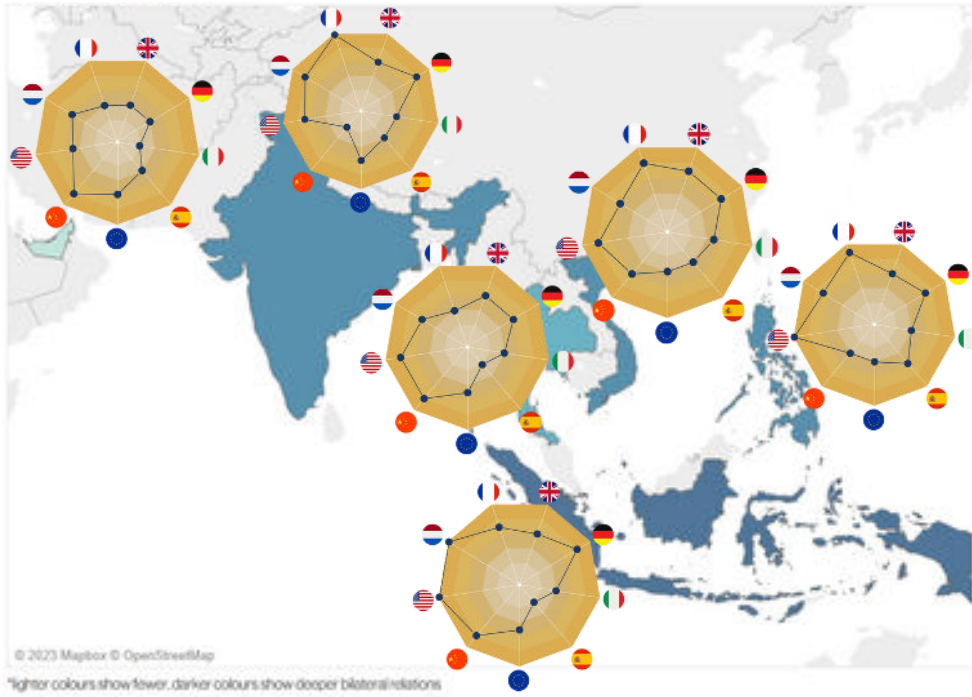


Figure 3. Overview of bilateral relations in security and intelligence between selected Indo-Pacific countries with European states, China, and the United States

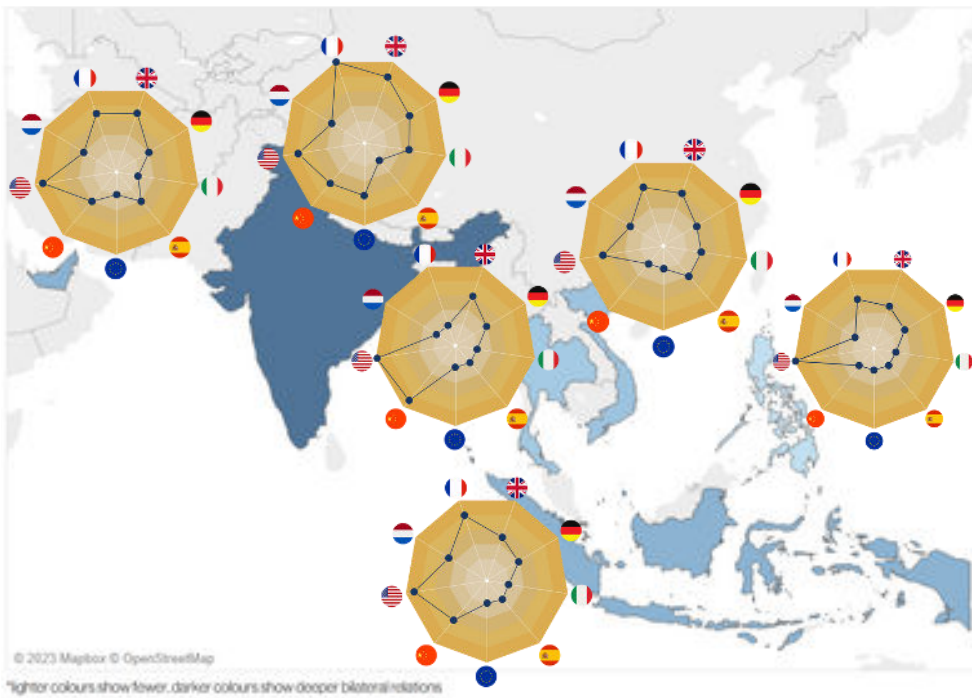
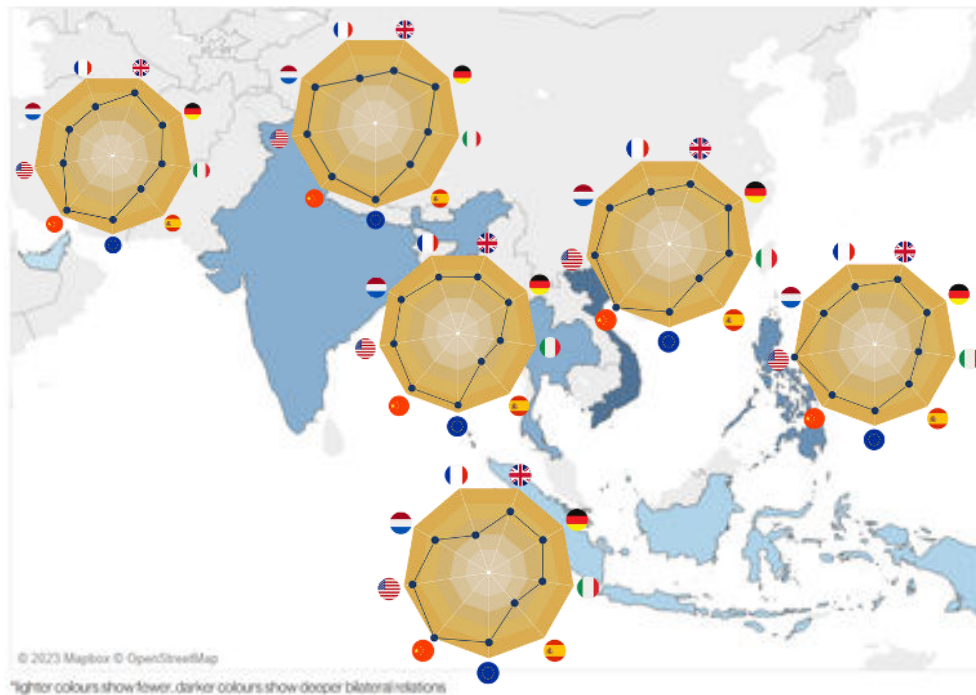


Figure 4. Overview of bilateral relations in trade and investment between selected Indo-Pacific countries with European states, China, and the United States



Based on our analyses, several recommendations are made:

1. While likewise and capable partners such as Australia, Japan, and South Korea will continue to be the bedrock of European engagement with the Indo-Pacific on maritime security, there is a much larger group of inbetweeners that have medium to high capacity but more limited affinity that need greater engagement on the part of Europe.
2. To solidify the maritime order in the Indo-Pacific, European states like the Netherlands should build on existing European strengths in trade and investment and capacity building. Deeper ties on security and intelligence are also welcome, but the added value of Europeans is likely to be more limited, due to the lack of independent military and intelligence capabilities that are sufficient to meaningfully contribute in this field.
3. Approaches should be differentiated by country. Southeast Asia is important but Europeans should be aware that the prime competition for influence in the region is between China and the US, with Europe's influence more limited. In contrast, if they deepen their ties to India, Europeans actually have greater manoeuvre space and more avenues to shape the relationship. The same applies to the UAE as a partner for strengthening maritime security in the Western Indian Ocean.
4. The forthcoming European, and particularly Dutch, naval presence in the region should therefore be part of a comprehensive, whole-of-government approach that looks to further solidify these ties with the regional states. Port visits can be a powerful symbolic opening of the door, though a consistent, long-term strategy is needed to keep the door open.

Introduction

The Indo-Pacific is the region where most of the key geopolitical and geoeconomic trends converge, and the region where there is the greatest risk of combustion as the Sino-American competition intensifies. Trade between the European Union and Asia represents the lion's share of the global economy, and nearly all of it moves over water. High-, medium-, and low-value added products to and from Europe's economies cross the Indian and Pacific Oceans, passing through key chokepoints such as the Suez Canal, Bab el Mandeb, Hormuz, Malacca, as well as through the East and South China Sea with their territorial disputes. These waterways face threats such as interstate war, littoral state conflict, intrastate conflict, terrorism, piracy, and climate change related disasters.¹ Small and middle powers in Europe and the Indo-Pacific thus have profound shared interests in keeping these chokepoints secure. Yet, European capacity is limited,² and their reliance on an overstretched and internally divided United States poses a growing risk. Moreover, the danger of the Sino-American competition escalating if the regional order relies entirely on the United States to provide deterrence is considerable. Consequently, European states must invest in relationships with states across the region to bolster maritime security around maritime trade routes and the sea lines of communication and hotspots. Doing so could strengthen the multilateral maritime order that is based on commonly agreed upon rules and which especially small and middle powers benefit from. At the same time, apart from a shared interest in maritime security, the national interests and perspectives of the wide swath of states along the maritime waterways between Europe and Northeast Asia are widely varied; European states need to take this into account when looking for partners in the Indo-Pacific.

The brief consequently does two types of analysis: (1) it orders Indo-Pacific states according to capacity and affinity to gauge with whom Europeans could best collaborate to strengthen a multilateral maritime order; and (2) it looks across policy domains for a selection of states to see the relative strengths and weaknesses of European states in their bilateral relationships, particularly in comparison to the United States and China. To gauge the relevance of states to maritime security, we included a series of indicators on naval capacity. For affinity, we looked at shared institutional and economic values. The key findings of this first type of analysis clarify that Indo-Pacific states fall into several tiers. There is a group of usual states – Japan, South Korea, and Australia – that is well-suited for cooperation because they share similar values and have the capacity to contribute to maritime security. These are the usual suspects upon which European states have – rightly – focused a great deal of attention in the past years. However, many states in the Indo-Pacific have either much less capacity or offer a much less complete match on value affinity. There is a large group of states that occupy a middle ground with medium to high capacity for improving maritime security, but limited affinity with European values. As these states are strategically and economically relevant in and of themselves, as well as relevant to the security and stability of key maritime chokepoints, we argue that they deserve greater attention. These are the states that could add significant capacity to

1 Benedetta Girardi, Paul van Hooft, and Giovanni Cisco, 'What the Indo-Pacific Means to Europe: Trade Value, Chokepoints, and Security Risks' (The Hague, Netherlands: The Hague Centre for Strategic Studies (HCSS), November 2023), <https://hcss.nl/wp-content/uploads/2023/11/What-the-Indo-Pacific-means-to-Europe-Trade-Value-chokepoints-and-Security-Risks-HCSS-2023.pdf>.

2 Paul van Hooft, Benedetta Girardi, and Tim Sweijs, 'Guarding the Maritime Commons: What Role for Europe?' (The Hague, Netherlands: The Hague Centre for Strategic Studies (HCSS), February 2022), <https://hcss.nl/wp-content/uploads/2022/02/Guarding-the-Maritime-Commons-HCSS-2022.pdf>.

maritime security and to support for a multilateral maritime order, or they could abstain or turn away from supporting it. There is thus a clear European strategic interest to strengthen ties with the “inbetweeners” states in this middle group.

The second type of analyses offers a structured breakdown of the bilateral relationships between a selection of European states on the one hand, and a selection of “inbetweeners” Indo-Pacific states on the other. The former comprises the Netherlands, France, Germany, the UK, Italy, and Spain. For the latter, we selected India and Indonesia, Philippines, Thailand, the United Arab Emirates, and Vietnam. For the structural breakdowns of bilateral relationships we looked at the fields of security and intelligence; trade and investment; capacity and infrastructure.³ The data allows us to see both the relative strengths and weaknesses of current individual and EU engagement with the inbetweeners states in the Indo-Pacific, but also places the European engagement in relative terms to that of the United States and China.

The key finding here is that European states, unsurprisingly, fall short of the same intensity of bilateral relations as the United States and China have, whether in terms of security and intelligence (the United States) or trade and investment (the United States and China), or even capacity-building and infrastructure (the United States). Moreover, European states strongly vary in the intensity of their bilateral relations, with France and the UK both having security and intelligence relations, as well as trade and investment, and capacity-building and infrastructure, while Germany and the Netherlands have bilateral relations that predominantly focus on trade and investment, as well as capacity-building and infrastructure, rather than security, and Italy and Spain have low intensity relations in all three dimensions. However, when we also consider the EU as a whole, its trade and investment relations with the Indo-Pacific states are comparable in intensity to those of the United States and China.

In short, this means that the Netherlands, and its European partners, should continue to build their engagement with the large middle group of inbetweeners states that have medium or high capacity, but limited affinity with Europe. This effort is complementary to deepening the relationship with key Indo-Pacific partners such as Australia, Japan, and South Korea. The Netherlands and its European partners should build this engagement on existing European strengths in trade and investment and capacity building. Deepening European-Indo-Pacific ties on security and intelligence would be valuable as well, but the value that Europeans can actually deliver over the coming decade is likely to be limited. Approaches should be customised to individual states. Europeans have a great deal to win and lose in Southeast Asia, but the region is contested between the US and Chinese superpowers. In contrast, with India, Europeans may have more to build on, as well as, to some degree, with the UAE. As the Netherlands, together with other European states, looks to increase its naval presence in the region, it cannot afford to do so without deep coordination between the other elements of statecraft, into a whole-of-government approach.

The remainder of this brief elaborates the two types of analysis mentioned.

³ The three dimensions are scored according to cooperation along a series of categories. For security and intelligence, these categories include joint exercises and operations, joint training and officer exchanges, military access, intelligence sharing, and arms sales. The trade and investment assessment is determined by the export, import and investment partner rankings, trade and investment agreements, and policies to enhance trade and investment. Capacity-building and infrastructural assistance is more basic, simply enumerating the major efforts in both categories.

1. Looking for partners: where to focus European and Dutch engagement on maritime security?

Europe and the Indo-Pacific are inextricably linked despite the vast distances that separate them: those links consist of trade and maritime transport, but also security concerns and geopolitical threats. In other HCSS briefs,⁴ we assess the central role of the trade of high, medium, and low value-added goods in linking European and Indo-Pacific economies. The conveyor belt connecting these two regions is highly dependent on long maritime routes that pass through a handful of chokepoints. These narrow waterways are particularly vulnerable to disruption from a series of geopolitical and security risks and their closure could signify massive losses for both European and Indo-Pacific economies.⁵ Granting safe and open passage through chokepoints is hence of vital interest to Europe.

However, the geographical distance between Europe and most of these maritime bottlenecks limits Europe's options, specifically with the demand on European military and other resources following Russia's invasion of Ukraine. Cooperation with Indo-Pacific states is thus imperative to ensure the openness of chokepoints and avoid significant trade disruptions. There is a wide variety of potential partners located in geographic proximity of maritime chokepoints, each with their own priorities and interests. Taking into account their (scarce) military capacity, but also shared values and geographical location, who should European states cooperate with? This section answers this question by looking at the value affinity between European and Indo-Pacific states, as well as the capacity of Indo-Pacific states to contribute to maritime security in the region.

Assessing value affinity and maritime security capacity

Affinity with each other's values is not merely a matter of looking to be on the right side; in fact, shared beliefs and values make working together easier, while significant maritime security capacity obviously makes it worthwhile. However, if taken individually, these criteria for partner selection present clear limits. To map the constellation of potential partners for Europe, we hence developed an assessment that cross-analyses international affinity and maritime security relevance of Indo-Pacific states to Europe, building on HCSS' previous

⁴ Girardi, van Hooft, and Cisco, 'What the Indo-Pacific Means to Europe: Trade Value, Chokepoints, and Security Risks'.

⁵ Girardi, van Hooft, and Cisco.

work.⁶ The assessment is based on three components: (a) the geographical distance of Indo-Pacific states to key maritime chokepoints, as the closer a state is to a chokepoint, the easier it will be for it to deploy capabilities to defend its openness; (b) the values and ideas that states close to Indo-Pacific chokepoints share with Europeans, as holding common beliefs is conducive to cooperation that benefits both partners; (c) Indo-Pacific states' military capacity to contribute to safeguarding open passage through chokepoints, since proximity and affinity do not automatically translate into sufficient capabilities to provide maritime security. A more detailed breakdown of the indicators used to assess value affinity and maritime security relevance can be found in the annex.

The first component, geographical distance, was used in a first instance to carry out a selection of states that are close enough to chokepoints to promptly react in case of maritime threats. The results of this selection are summarised in tables 1 and 2.⁷

Table 1. Distance of selected states from chokepoints in the western Indo-Pacific



	Suez Canal		Bab el Mandeb		Hormuz Strait	
	Miles	Days	Miles	Days	Miles	Days
Europe (Rotterdam)	3930	5.5	6030	8.4	7216	10.0
Bahrain	3362	4.7	1229	1.7	115	0.2
Djibouti	1501	2.1	770	1.1	1956	2.7
Egypt	/	/	2133	3.0	3319	4.6
Eritrea	1389	1.9	782	1.1	1968	2.7
India	4471	6.2	2602	3.6	3146	4.4
Iran	3076	4.3	943	1.3	355	0.5
Kuwait	3612	5.0	1480	2.1	421	0.6
Oman	2820	3.9	/	/	563	0.8
Qatar	3319	4.6	1480	2.1	/	/
Saudi Arabia	3440	4.8	1307	1.8	219	0.3
Somalia	2689	3.7	1177	1.6	2363	3.3
UAE	3213	4.5	1080	1.5	183	0.3
Yemen	1517	2.1	616	0.9	1802	2.5

6 See Paul Van Hooft, Benedetta Girardi, and Tim Swejts, 'Guarding the Maritime Commons: What Role for Europe?' (The Hague, Netherlands: The Hague Centre for Strategic Studies (HCSS), February 2022). chapter 2, where international affinity and strategic relevance are operationalised to establish optimal Indo-Pacific partners for European states. There are some key differences with the previous work. The present selection of states differs from the one of the 2021 report because the states considered here are those in proximity of maritime chokepoints. The operationalisation of international affinity, intended as shared values and interest, remains the same as in the previous report, with up-to-date data. Given the focus of the current paper on maritime security and openness of maritime chokepoints, the concept of strategic relevance has been modified to reflect the maritime dimension of the analysis. Strategic relevance has hence become 'maritime security relevance,' with the addition of criteria regarding the participation of the considered states to maritime organizations and agreements. Additionally, a military dimension has been added through the integration of criteria regarding naval, air, and missile capabilities. See Anex I for more details on the methodology.

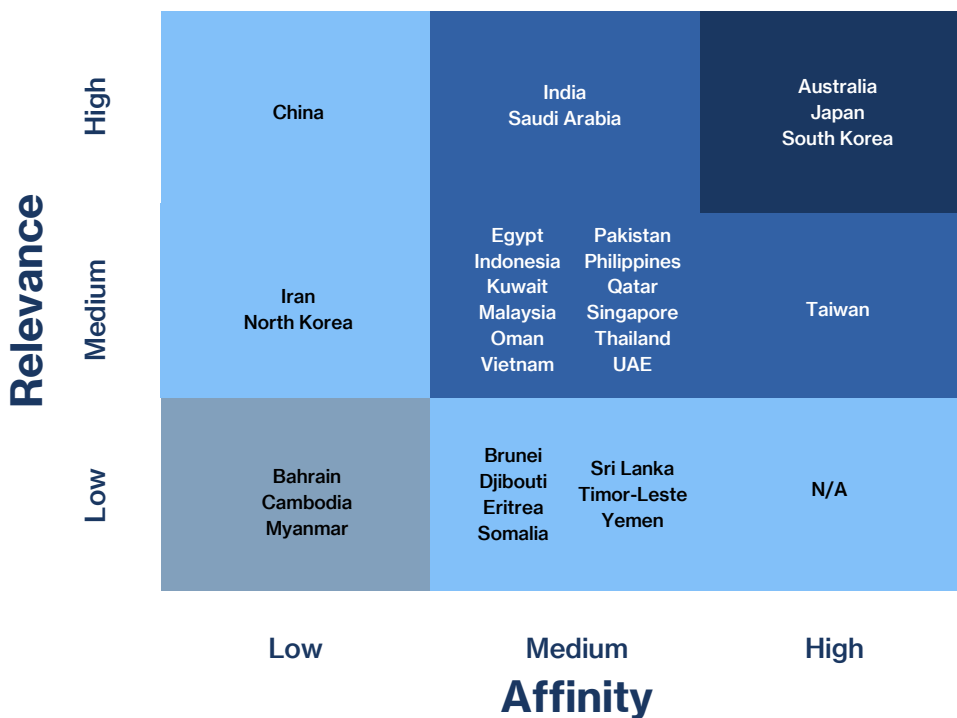
7 The distance and amount of days needed to travel from a state to a chokepoint has been calculated by taking the closest port to both state and chokepoint and assuming an average travel speed of 30kn.

Table 2. Distance of selected states from chokepoints in the eastern Indo-Pacific

	Malacca Strait		Lombok Strait		Ombai Strait		South China Sea		East China Sea	
	Miles	Days	Miles	Days	Miles	Days	Miles	Days	Miles	Days
Europe (Rotterdam)	9286	12.9	10101	14.0	11068	15.4	10911	15.2	11937	16.6
Australia	2405	3.3	2235	3.1	545	0.8	2230	3.1	2987	4.1
Brunei	885	1.2	1248	1.7	1733	2.4	740	1.0	1766	2.5
Cambodia	699	1.0	1617	2.2	1638	2.3	1500	2.1	2481	3.4
China	1634	2.3	2017	2.8	2717	3.8	1008	1.4	/	/
India	1961	2.7	2875	4.0	3864	5.4	3586	5.0	4613	6.4
Indonesia	1063	1.5	/	/	1980	2.8	1805	2.5	2914	4.0
Japan	3782	5.3	3797	5.3	3818	5.3	2294	3.2	1246	1.7
Malaysia	/	/	1042	1.4	1604	2.2	610	0.8	1637	2.3
Myanmar	889	1.2	1931	2.7	1952	2.7	2515	3.5	3541	4.9
North Korea	3673	5.1	3770	5.2	3165	4.4	2185	3.0	1042	1.4
Pakistan	3168	4.4	4076	5.7	5064	7.0	4793	6.7	5820	8.1
Philippines	1625	2.3	1784	2.5	1772	2.5	/	/	1163	1.6
Singapore	57	0.1	995	1.4	1016	1.4	1604	2.2	2630	3.7
South Korea	3273	4.5	3370	4.7	2764	3.8	1785	2.5	624	0.9
Sri Lanka	1637	2.3	2545	3.5	3534	4.9	3263	4.5	4289	6.0
Taiwan	2149	3.0	2390	3.3	2201	3.1	667	0.9	535	0.7
Thailand	838	1.2	1851	2.6	2791	3.9	1689	2.3	2715	3.8
Timor-Leste	2284	3.2	1958	2.7	/	/	1772	2.5	2587	3.6
Vietnam	980	1.4	1367	1.9	2284	3.2	796	1.1	1724	2.4

The second and third components – affinity and relevance to maritime security – have been used to analyse the weight of the selected states in working with Europe towards maintaining open chokepoints and hence granting unscathed passage of trade via these waterways. As a result of this assessment (Annex 2), states have been plotted on a matrix (Figure 5).

Figure 5. Matrix plotting the assessment of selected Indo-Pacific states according to international affinity and maritime security relevance

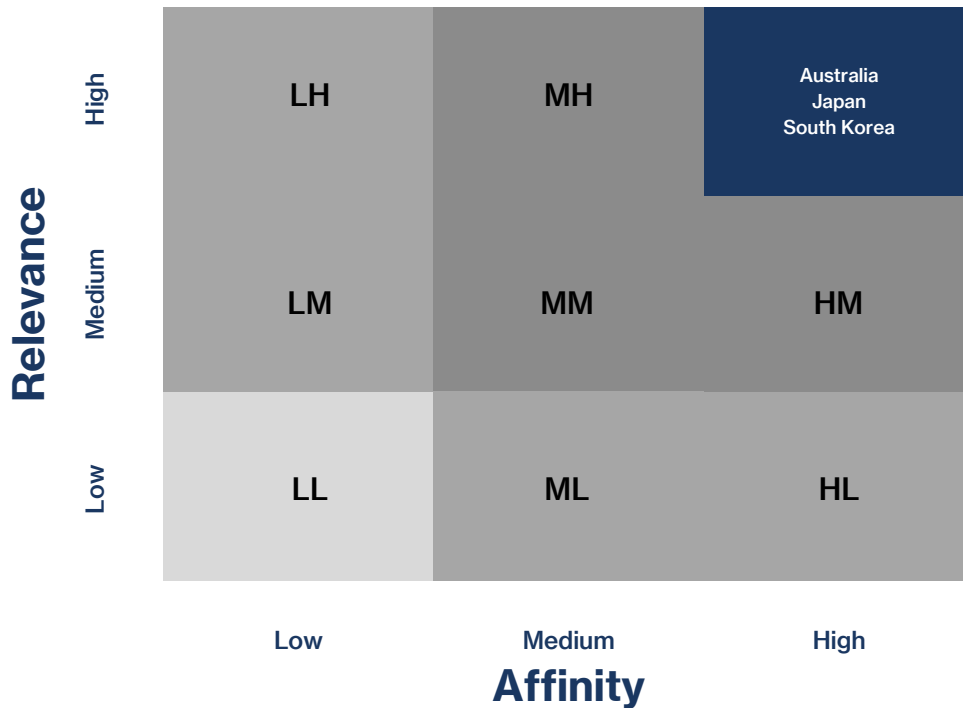


Mapping potential partners for Europe to strengthen maritime security

The assessment conducted according to the abovementioned methodology allowed for the division of Indo-Pacific states located in proximity of maritime chokepoints in eight categories. In turn, these eight categories have been grouped into four tiers that better describe the possibility for cooperation between European and Indo-Pacific states to safeguard maritime chokepoints' security, namely: (1) *Close and Powerful Partners*, the states that represents certainties for Europe's engagement in the Indo-Pacific and with which cooperation is already underway; (2) *Potential Spoilers*, the states with which cooperation is complicated; (3) *Inbetweeners*, the states that hold significant potential for cooperation and enough capacity to make it worthwhile; (4) *Limited Gains, Limited Losses*, the states that are not capable of providing maritime security and are far from European values .

Close and powerful partners

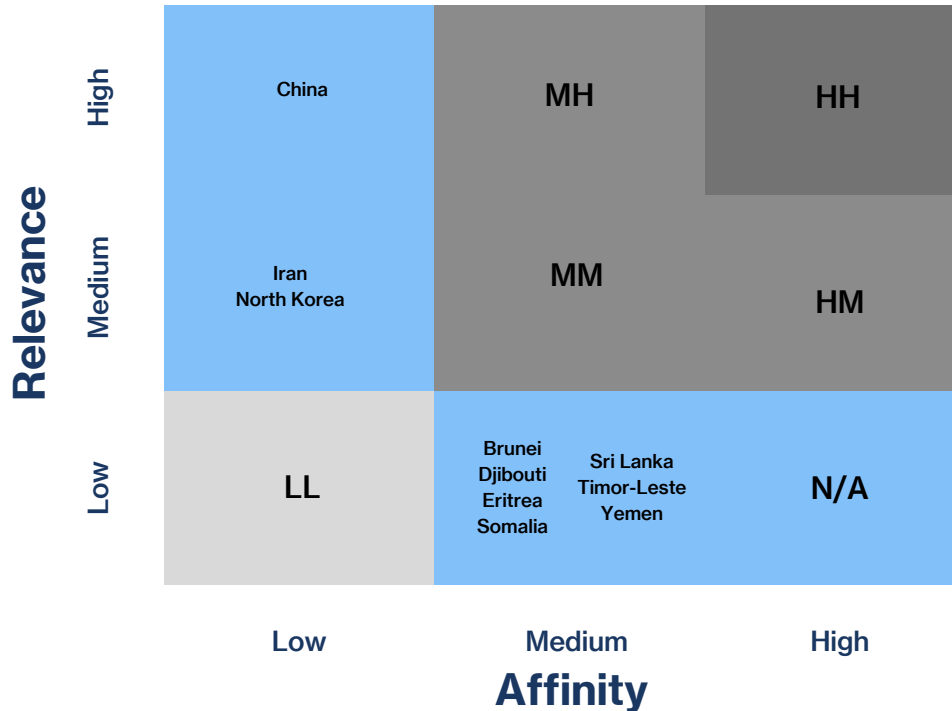
Figure 6. Relevance and affinity of close and powerful partners in the Indo-Pacific



From the perspective of European countries, those states with which they share values, and which also have the capacity to act, make the best partners with whom collaboration should come most easily. As shown in Figure 6, Australia, Japan, and South Korea fall into this category, and indeed, Europe already frequently engages with all three through strategic partnerships and dialogues, as well as joint naval exercises.⁸ These states are established regional powers with significant maritime security capacity. They are able to project their maritime power at a regional level, since all three have navies capable of regional-power projection. Thus, they can significantly contribute to maritime security in the region. The three countries also have high affinity with European states since all are liberal democracies, and consequently share Europe's concern with issues such as protecting human rights and maintaining a rules-based order backed by international norms in the Indo-Pacific.⁹ Australia, Japan, and South Korea are, therefore, undoubtedly reliable partners for Europe in the Indo-Pacific and, while cooperation is already underway, deepening maritime security ties with these three countries is a foregone conclusion.

8 '10 Years of the EU-Republic of Korea' (European Union External Action, 30 June 2020), https://www.eeas.europa.eu/sites/default/files/documents/factsheet_eu_republic_of_korea_june-2020-v2.pdf; 'EU-Japan Strategic Partnership' (European Union External Action, July 2023), <https://www.eeas.europa.eu/sites/default/files/documents/2023/EU-Japan-2023-07.pdf>; 'Maritime Security: EU and Japan Carry out Joint Naval Exercise', European Union External Action, 18 October 2021, https://www.eeas.europa.eu/eeas/maritime-security-eu-and-japan-carry-out-joint-naval-exercise-0_en; 'The European Union and Australia', Delegation of the European Union to Australia, 21 July 2021, https://www.eeas.europa.eu/australia/european-union-and-australia_en?s=163.

9 'Democracy Report 2023: Defiance in the Face of Autocratisation', Democracy Report (Gothenburg: Varieties of Democracy, 2023), 40–41, https://v-dem.net/documents/30/V-dem_democracyreport2023_highres.pdf.

(Potential) spoilers**Figure 7. Relevance and affinity of (potential) spoilers in the Indo-Pacific**

In contrast, there is a category of states with which Europe has little affinity in terms of values, but which do have the capacity to undermine maritime security. These are the (potential) spoilers of a multilateral maritime order based on rules, shown in Figure 7. China stands out among these states; not necessarily as an actor with the intention to undermine the existing order, but with the capacity to do so, and at the very least to challenge US hegemony.¹⁰ In fact, there is little-to-no doubt that Beijing's military and maritime security capabilities are impressive, as China is capable of global deterrence and has a large and constantly growing arsenal. China stands in a unique position vis a vis Europe, considering that deep commercial ties between the two coexist with security tensions and concerns over Chinese human rights violations. It is thus undeniable that China and Europe have vastly different values and beliefs. Although China is Europe's largest trading partner, their relations are dampened by China's undemocratic regime and human rights violations. The EU's definition of China as a 'partner, competitor and systemic rival'¹¹ fits the brief: Europeans should seek cooperation with China where possible, but they should also be aware of the limits of such collaboration.

More direct threats to maritime security such as Iran and North Korea also fit in this category. Cooperation with these two states is undoubtedly very difficult for Europe. Both are autocracies with a very weak rule of law, diffused infringement of human rights, and a weak

10 Paul van Hooft and Tim Sweijjs, 'Why Should Europe Guard the Indo-Pacific Maritime Commons. Order, Access, or US Hegemony?' (The Hague, Netherlands: The Hague Centre for Strategic Studies (HCSS), September 2023), <https://hcss.nl/wp-content/uploads/2023/09/EIPH-Order-Access-Hegemony.pdf>.

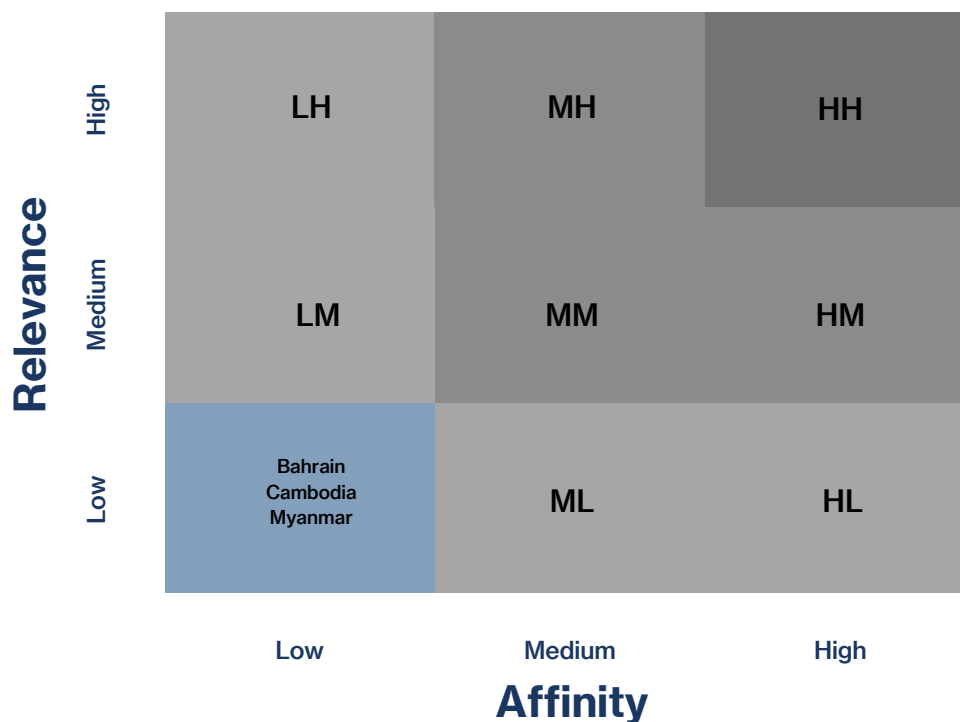
11 Ulrich Jochheim, 'EU-China Trade Relations' (European Parliamentary Research Service, October 2023), 1, [https://www.europarl.europa.eu/RegData/etudes/ATAG/2023/753952/EPRS_ATA\(2023\)753952_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/ATAG/2023/753952/EPRS_ATA(2023)753952_EN.pdf).

environmental performance. While they both have navies capable of regional power projection and are able to operate ballistic missiles, their participation in maritime security organisations and agreements, as well as their political and diplomatic influence are limited by their isolationist attitudes towards foreign policy.

Lastly, partnering up with Brunei Eritrea, Somalia, Sri Lanka, Timor-Leste, and Yemen would yield very little return in terms of these states' capabilities to contribute to maritime security. They have scarce military capacities and very limited diplomatic and political influence, and most of their navies do not extend beyond inshore constabulary. This makes it difficult to see a substantial contribution to maritime security. Though it falls into this category in our coding scheme, Djibouti is somewhat of an exception, as many European states deploy contingents or make use of military bases in Djiboutian territory. This makes Djibouti strategically relevant, despite its scarce naval capabilities.¹²

Limited gains, limited losses

Figure 8. Relevance and affinity of states promising limited gains and limited losses in the Indo-Pacific

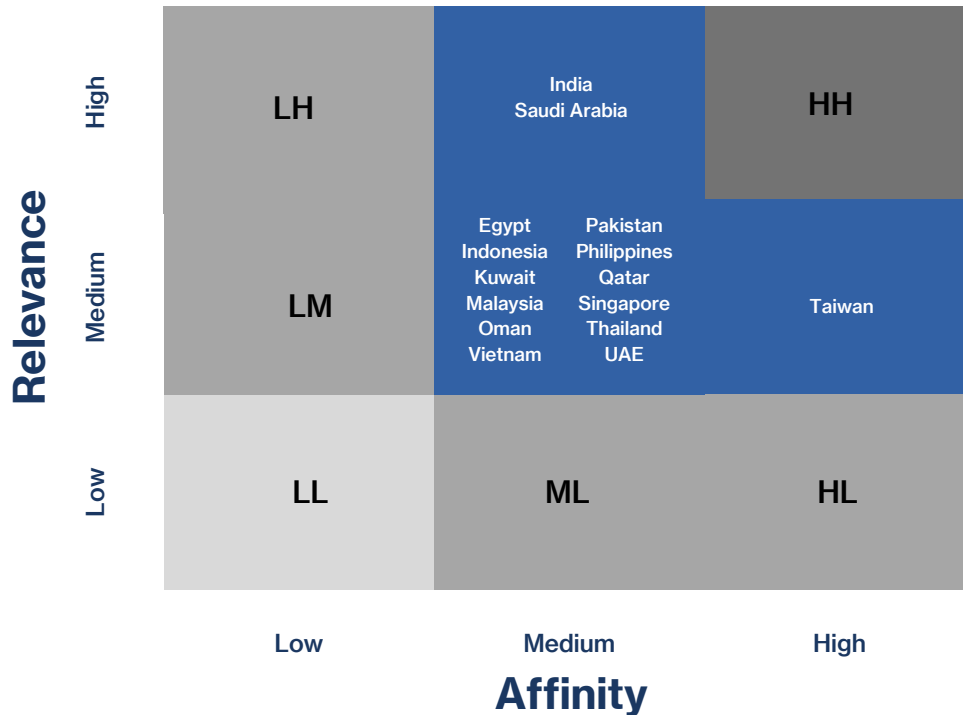


As Figure 8 visualises, three of the considered countries clearly hold less potential as partners for maritime security. Bahrain, Cambodia, and Myanmar are non-democratic countries with severe violations of human rights and a weak rule of law. Their navies' power projection is limited and so are their military capabilities. Despite their vicinity to maritime chokepoints, cooperation with these three states would not be optimal for Europeans.

¹² Van Hooff, Girardi, and Sweijs, 'Guarding the Maritime Commons: What Role for Europe?'

Inbetweeners

Figure 9. Relevance and affinity of inbetweeners in the Indo-Pacific



The most interesting group of states is neither the close partners, nor the potential spoilers, but instead the states that have the capacity to (re)shape maritime security, but with which Europeans do not have automatic affinity in terms of values. Moreover, this is clearly the category into which most states in the region fall. Figure 8 displays the inbetweeners. This group represents the most interesting opportunity for partners for Europe. The states in this category share enough with Europe to make cooperation viable and at the same time have enough maritime security capacity to be valuable partners. In the understandable European rush to shore up relations with Japan, South Korea, and Australia as the region undergoes a period of geopolitical turbulence, this category is perhaps often underrated. Yet, the group of in-between states is the one where much can be won or lost in terms of promoting a multilateral maritime order with a security architecture based on rules.

Both India and Saudi Arabia fit the same category of highly capable states that are party to UNCLOS and show a certain respect for the rule of law, but they have heavy shortcomings when it comes to environmental performance and respect for human rights, resulting in mixed affinity to Europe. The two states are nonetheless highly relevant when it comes to maritime security as they are capable of regional deterrence and equipped with anti-ship cruise missiles. Additionally, India and Saudi Arabia have considerable diplomatic representation in the region, that, taken together with their governments' political weight, grant them significant influence on the regional dynamics. India is arguably the key state where Europeans have

attempted to strengthen cooperation, despite some value differences.¹³ The country is in a particular situation; it finds itself between the two sides of the Indo-Pacific, almost equidistant between the chokepoints under consideration. As a regional superpower and, increasingly, a great power on the global stage, it has great potential for influence in the region in this strategic location. As a result of its navy's multiregional power projection, India could possibly contribute to the security of both eastern and western Indo-Pacific chokepoints. Saudi Arabia is definitely well positioned to intervene in the western Indo-Pacific chokepoints. Its power projection is, however, much more limited compared to that of India and this could hinder its chances of actually contributing to the maintenance of open chokepoints.

The group of states that has medium capacity to contribute to or undermine maritime security on or near chokepoints, but with which Europe does not share many values, is particularly large and varied. It includes Egypt, Indonesia, Kuwait, Malaysia, Oman, Pakistan, the Philippines, Qatar, Singapore, Thailand, the UAE, and Vietnam. On the one hand, the mixed value compatibility of these states with Europe could make the outcomes of cooperation less straightforward and more unpredictable. Kuwait, Oman, Qatar, UAE, and Vietnam are autocracies far from respecting the democratic beliefs cherished by European states. Others, like Egypt and Thailand, are unstable anocracies that show little respect for human rights, clashing with European core values of respect for individual liberties. The reduction of CO₂ emissions and environmental protection is also low on the priority list of many these states. On the other hand, these states are often the ones most closely located next to chokepoint and they all have some level of maritime security capacity. In fact, while their navies and aircrafts are not the most advanced, they are still capable of a projection sufficient to actively contribute to the protection of maritime chokepoints. This group of small and medium powers is hence particularly interesting for Europe; they have the political and military heft that losing their cooperation would increase the costs and friction regarding upholding the multilateral maritime order for Europe and its regional partners, while getting them on board would significantly amplify European efforts. Yet, finding the right venues for cooperation could prove challenging due to the limited value affinity.

The last member of this group, Taiwan, presents a different situation: its affinity to European states' values and beliefs is strong, but its maritime security relevance is limited due to its minor military power. While Taiwan is especially close to the South and East China Seas, it would struggle to project its power much further. This is because Taiwan is preoccupied with ensuring its own security in the face of hybrid attacks and the threat of forceful reunification from China. Its lack of universally recognised political status may be another factor that does not facilitate cooperation with European states.

13 '25th Anniversary of the Indo-French Strategic Partnership: Towards a Century of French-Indian Relations' (Presidence de la Republique), accessed 14 September 2023, <https://www.elysee.fr/admin/upload/default/0001/15/13ca1dc3c8938ae4ce52f5c53e149ddd251099cb.pdf>; 'EU-India Strategic Partnership: A Roadmap to 2025' (European Union External Action, July 2020), https://www.eeas.europa.eu/sites/default/files/eu-india_factsheet_2020-07.pdf; 'Exploring India Netherlands Trade and Economic Relations', India Brand Equity Foundation, March 2023, <https://www.ibef.org/indian-exports/india-netherlands-trade>; 'Gulf of Guinea: EU and India Carry out Joint Naval Exercise', Delegation of the European Union to Guinea, 26 October 2023, https://www.eeas.europa.eu/eeas/gulf-guinea-eu-and-india-carry-out-joint-naval-exercise_en?s=356; Rajeshwari Krishnamurthy and Richard Ghiasy, 'The Transitioning Security Order in the Indo-Pacific: Furthering India-EU and Triangular Collaboration', IPCS Special Report (Institute of Peace and Conflict Studies, Leiden Asia Centre, Friedrich Ebert Stiftung, December 2022), <https://library.fes.de/pdf-files/bueros/asia/20110.pdf>.

Findings and implications for European partnerships

When it comes to potential for cooperation between European states and states in the wider Indo-Pacific region in the field of maritime security, there is a group of 'usual suspects' (Australia, Japan, and South Korea) that make the most obvious partners for Europe in the region as these have both affinity with European values and the capacity to positively contribute to maritime security. Europe currently already engages with these three states to strengthen the multilateral maritime order in the Indo-Pacific. Cooperation with Australia, Japan, and South Korea should be enhanced further; this is something that European states are already working on, for example by forging new strategic partnerships and deepening cooperation through digital and economic partnerships.¹⁴

Most interestingly, the assessment highlights a large group of "inbetweeners". These are states that hold much potential to be fundamental partners for Europe in the Indo-Pacific as countries which have the capability to enhance regional security, and which share European values to a certain extent. Caught in between China and the United States and their great power competition in the region, they might look at Europe as a favourable and somewhat more neutral alternative for partnerships. The states included in this category are akin to Europe in their middle powers status and have enough capacity to contribute to maritime security. This heterogeneous group is the one that Europe should consistently focus on when considering new partners in the Indo-Pacific; which of these should be prioritised is the focus of the next section.

14 'Horizon Europe: The EU and the Republic of Korea Launch Formal Negotiations on Association to the Programme', European Commission, 22 May 2023, https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/horizon-europe-eu-and-republic-korea-launch-formal-negotiations-association-programme-2023-05-22_en; 'Joint Statement by France and Australia', Elysee, 1 July 2022, <https://www.elysee.fr/en/emmanuel-macron/2022/07/01/joint-statement-by-france-and-australia>; 'Joint Statement on the Establishment of a Strategic Partnership between the Government of the Republic of Korea and the Government of the Kingdom of the Netherlands - Diplomatic Statement', Government of the Netherlands (Ministerie van Algemene Zaken, 23 November 2022), <https://www.government.nl/documents/diplomatic-statements/2022/11/17/joint-statement-on-the-establishment-of-a-strategic-partnership-between-the-government-of-the-republic-of-korea-and-the-government-of-the-kingdom-of-the-netherlands>.

2. Inbetweeners: how to best engage with them?

European states need to collaborate with countries in the Indo-Pacific to achieve their goals of strengthening the multilateral maritime order, dampening the risks of further militarisation, and enhancing their own role in the region, given their limited capacities;¹⁵ but with whom can Europeans gain or lose the most should they collaborate, or, conversely, fail to?

We argue that Europe should particularly focus on the inbetweener states, those with enough stakes in the region and capacity to actually contribute to shaping a multilateral maritime order, but that could choose the extent to which they do so. This is a varied group of states, entailing a diversity of interests and preferences towards cooperation with Europe. What then is the best way to engage with the regional powers that are in this middle group, and where is Europe relatively strong or weak in comparison to other powers?

The second part of this brief therefore examines the existing bilateral relations between key European states – the Netherlands, France, Germany, the UK, Italy, and Spain – as well as the European Union as a whole, and selected Indo-Pacific states to identify trends in their current engagement. To get a sense of the scale and scope of these European forms of engagement, the section then contrasts these bilateral ties with those of the United States and China, the two great powers shaping the regional order through their competition.

Assessing avenues for engagement between Europe and the Indo-Pacific

By mapping the existing relative European strengths and weaknesses in bilateral relationships with the inbetweener states in the Indo-Pacific, Europeans can further systematically deepen cooperation in three ways. First, the analysis shows both areas in which collaboration among bilateral partners is already well-developed and fields in which it is lacking,

¹⁵ 'France's Indo-Pacific Strategy' (Ministry for Europe and Foreign Affairs, February 2022), 54, 60, https://www.diplomatie.gouv.fr/IMG/pdf/en_dcp_a4_indopacifique_022022_v1-4_web_cle878143.pdf; 'Indo-Pacific: Een Leidraad Voor Versterking van de Nederlandse En EU-Samenwerking Met Partners in Azië' (Rijksoverheid, 13 November 2020), <https://open.overheid.nl/documenten/ronl-84107ff4-e66b-4aa2-a7a9-07fec3e3601b/pdf>; Joint Communication to the European Parliament and the Council: The EU Strategy for Cooperation in the Indo-Pacific' (European Commission, High Representative of the Union for Foreign Affairs and Security Policy, 16 September 2021), 1–2, 13, https://www.eeas.europa.eu/sites/default/files/jointcommunication_2021_24_1_en.pdf; Van Hooft, Girardi, and Sweijts, 'Guarding the Maritime Commons: What Role for Europe?'; Paul Van Hooft and Tim Sweijts, 'Why Should Europe Guard the Indo-Pacific Maritime Commons: Order, Access, or US Hegemony?' (The Hague, Netherlands: Hague Centre for Strategic Studies, September 2023), <https://hcass.nl/report/why-should-europe-guard-the-indo-pacific-maritime-commons-order-access-or-us-hegemony/>.

opening up pathways for strengthening engagement. The relevant states thus obtain a guide map of where to deepen engagement, with which they can make strategic choices in the face of constrained capacities. Second, investigating different European states simultaneously outlines avenues for a division of labour among them. That is to say, given the close relations on the European continent, countries there can harness their strategic advantages vis-à-vis their neighbours to optimise collective European influence in the Indo-Pacific. Third and finally, by offering a comparison of European efforts in the Indo-Pacific with those of China and the United States, the brief demonstrates where regional players lean in the current great power competition. This has ramifications for how effective further European engagement is with a view to furthering the continent's strategic interests. Overall, our assessment of the current engagement between European and Indo-Pacific states thus forms the basis for identifying pathways for enhancing cooperation in and with the region in the future.

To reiterate, our primary motive for selecting so-called middle group countries was to find states that have the capacity to strengthen or weaken a multilateral maritime order that increases security in the Indo-Pacific region, or, conversely, to abstain from making a contribution. States with neither capacity nor shared values were excluded because of the small likelihood that close relations with these countries would be desirable from a normative perspective, or contribute to European policies in the Indo-Pacific. On the other end of the spectrum, we do not consider Australia, Japan and South Korea – states with high affinity and relevance – as Europe already has strong ties and frameworks for cooperation across multiple policy domains; these relations should be – and are being – deepened, but they are a group of states that is unlikely to move away from Europe. We finally exclude Taiwan from our selection, though we code it as having high affinity and medium capacity, because it is too constrained as a consequence of the direct threat it faces from China.

Among the remaining inbetween group of countries, we identified the following selection of cases: India (which has high capacity), and Indonesia, the Philippines, Thailand, the United Arab Emirates (UAE), and Vietnam (which all have medium capacity). These states were selected both for their proximity to vulnerable maritime chokepoints (see Tables 1 and 2), as well as for their potential to shape regional dynamics. In fact, these six states have high stakes due to their geographic location as well as significant practical and potential influence over maritime security. Even if they do not fully share European values, it is thus necessary for Europe to take a closer look at relations with the selected countries for the sake of preserving the accessibility and security of maritime trade routes. The UAE is thereby relevant for maritime security in the Indian Ocean, while Indonesia, the Philippines, Thailand, and Vietnam are more influential in the Pacific Ocean. India, in particular, as a great power, has high capacity for affecting economic and geopolitical developments in the region on both fronts given its strategic positioning.

The focus of this second part of the brief is to assess European engagement with the selected states. However, as the power dynamics in the region are shaped by Sino-American competition, we also analyse the relations of these six states with the United States and China. This allows us to identify the strength of Europe's positioning in comparison to the superpowers in the Western Pacific. Therefore, by looking at the broader geopolitical affinities of the states under investigation, we can gauge how much room for manoeuvre there is for European states vis-à-vis pressure from the United States and China. These considerations, finally, allow us to assess pathways for Europe to push back against Chinese influence.

We looked at three dimensions of bilateral relations between European partners and the selected regional Indo-Pacific states: (1) security and intelligence, (2) trade and investment, and (3) capacity-building and infrastructural assistance. Each category comprises several indicators. Security and intelligence consists of joint exercises and operations, joint training and officer exchanges, military access, intelligence sharing, and arms sales. The trade and investment assessment is shaped by the export, import and investment partner rankings, trade and investment agreements, and policies to enhance trade and investment. Capacity-building and infrastructural assistance, finally, is not disaggregated further. It is a more heterogeneous category in which we made a more subjective assessment, but broadly includes initiatives on the environment, finance and taxes, law enforcement, digitalisation, education and gender, road, dykes and railway construction, and disaster relief.

By first assessing each indicator, and then aggregating to the broader dimensions, every bilateral relationship was awarded a classification of highest, high, medium, low, or lowest for each of the three categories. This is determined by the intensity and depth of the countries' relationship in different fields. For security and intelligence, the ranking is higher if formal agreements are in place, and the interactions are planned, recent and regular. Economic relations are identified to be closer the higher the bilateral partners rank on export, import and investment, and the more formalised, regular and recent their engagement is.¹⁶ As stated above, we assessed capacity-building and infrastructural assistance more subjectively, giving more weight to capital-intensive, high-level, governmental, institutionalised and long-term interactions.

The three dimensions for assessment cover the different aspects of bilateral relationships. By investigating them separately, we can disaggregate in which areas different states have weak or strong relations, and better identify overall trends.

European strengths and weaknesses in engagement with the Indo-Pacific

European states clearly vary amongst themselves regarding the relative strengths and weaknesses of their bilateral ties to Indo-Pacific states.

The strongest ties of the Netherlands to the Indo-Pacific are in trade and investment, followed by capacity-building and infrastructure. On the former, the Netherlands is usually a major (European) investment partner, specifically in sectors such as water, climate, and agriculture. Dutch trade and investment relations are most developed with India, Thailand, and Vietnam, for instance through the Dutch-Vietnamese Strategic Partnership Agreement on Climate Change and Water from 2010.¹⁷ The Netherlands has also paid more attention to trade and investment in the region in recent years since it designated Indonesia and Vietnam as two

¹⁶ Two caveats are in order here. First, we give less weight overall to the investment ranking because information on this is inconsistent and limited. It is only noted where particularly relevant. Policies on trade and investment are, secondly, a less tangible and objective indicator. They are nevertheless included to provide valuable insights into future trends and developments.

¹⁷ 'Agriculture & Agro Food - Vietnam', Ministerie van Buitenlandse Zaken (Ministry of Foreign Affairs), accessed 8 September 2023, <https://www.netherlandsandyou.nl/your-country-and-the-netherlands/vietnam/agriculture--agro-food>.

of 25 priority markets in 2022.¹⁸ Regarding the latter dimension of capacity-building and infrastructure, the country, first and foremost, shares expertise on water/maritime and agricultural management with its partners. This works especially well in Indonesia, which faces significant water-related challenges from climate change, and has long-standing ties with the Netherlands. For instance, the Dutch support Jakarta in establishing flood protection.¹⁹ India also receives significant infrastructural support from the Netherlands. In contrast to these two dimensions, bilateral security and intelligence ties between the Netherlands and this selection of Indo-Pacific states are still limited.

Germany has similar strengths to the Netherlands in the Indo-Pacific, likewise focusing mostly on trade and investment, and capacity-building and infrastructure; however, Germany is slightly less engaged on both dimensions than the Netherlands. German trade and investment ties, most developed with India and Vietnam, stem from extensive German imports, and, at times, institutional arrangements, such as the Joint Commission on Industrial Economic Cooperation at the ministerial level with India.²⁰ Recently, infrastructural assistance by the German government has largely focused on environmental protection, and the green transition. Major partner countries for this are Indonesia, including within the framework of the Indonesian-German Green Infrastructure Initiative,²¹ and India. Despite such deep trade and infrastructure relations, Germany, like the Netherlands, largely lacks cooperation mechanisms on security and intelligence in the Indo-Pacific.

Such security and intelligence ties are, however, the major strong point of France. Among European states, France has been oriented towards the Indo-Pacific the longest, and conceives of itself as an Indo-Pacific country due to its territories and citizenry in the region; alongside the UK, France is also one of the two European maritime powers that possesses a navy with significant power projection capabilities (including an aircraft carrier and attack submarines), and it possesses a significant indigenous defence industry.²² France thus possesses clear advantages in the defence sphere compared to its European partners. French bilateral relations with India on security matters are strongly developed in multiple categories. These relations include joint military exercises, such as a biennial army exercise²³, military access through a military logistics agreement²⁴, intelligence sharing²⁵, and

18 'Policy Document 2022: Do What We Do Best. A Strategy for Foreign Trade and Development Cooperation' (Ministerie van Buitenlandse Zaken, June 2022).

19 Mark Rutte, 'Speech by Mark Rutte at the Indonesia-Netherlands Business Dinner', Government of the Netherlands (Ministerie van Algemene Zaken, 22 November 2013), <https://www.government.nl/documents/speeches/2013/11/21/speech-by-mark-rutte-at-the-indonesia-netherlands-business-dinner>.

20 'India-Germany Relations' (Indian Ministry of External Affairs, December 2014), https://www.mea.gov.in/Portal/ForeignRelation/Germany_Dec2014.pdf.

21 'Nachhaltige Energien stärken', Bundesministerium für wirtschaftliche Zusammenarbeit und Entwicklung, accessed 18 September 2023, <https://www.bmz.de/de/laender/indonesien/schwerpunkt-energie-12368>.

22 Céline Pajon, 'France in the Indo-Pacific: From a Balancing Power to a Constructive Stakeholder', *Asia Policy* 18, no. 3 (23 July 2023), <https://www.ifri.org/en/publications/publications-ifri/articles-ifri/frances-indopacific-strategy-balancing-power>; Stephanie Pezard, Michael Shurkin, and David A. Ochmanek, *A Strong Ally Stretched Thin: An Overview of France's Defense Capabilities from a Burdensharing Perspective*, Research Reports (Santa Monica, CA: RAND Corporation, 2021), 52–53, https://www.rand.org/pubs/research_reports/RRA231-1.html.

23 Mukesh Shankar Bharti and Akshithaa Singh, 'India and France Bilateral Partnership for Advancing Strategic Autonomy in the Indo-Pacific Region: Special Reference to the Indo-French Strategic Partnership', *Cogent Social Sciences* 9 (2023): 2215561.

24 Rajeswari Pillai Rajagopalan, 'India's Military Outreach: Military Logistics Agreements', *The Diplomat*, 9 September 2021, <https://thediplomat.com/2021/09/indias-military-outreach-military-logistics-agreements/>.

25 Krishnamurthy and Ghiasy, 'The Transitioning Security Order in the Indo-Pacific: Furthering India-EU and Triangular Collaboration'.

major arms sales, which now make India France's biggest foreign customer for weapons.²⁶ Notably, French-Indian ties have significantly strengthened since 2018 – so much so, that Indo-French defence relations are currently even more developed than India's security ties with both the US and China. French-Indonesian security mechanisms are also strong, and those with the Philippines are set to be strengthening due to the ongoing negotiations of a status of visiting forces agreement (SOVFA).²⁷ France is, furthermore, involved in capacity-building and infrastructure investment. Such infrastructural engagement is strongest with India; the two countries even have programmes to jointly provide infrastructure support to third countries – they are currently establishing the Indo-Pacific Triangular Cooperation Fund to enhance the use of green technologies throughout the Indo-Pacific, and provide support with solar programmes through the International Solar Alliance founded by both countries in 2015.²⁸ Infrastructure assistance extends to other countries, as well, with efforts to mitigate climate change and further sustainable development, and enhance agricultural development, for instance through the Joint Agricultural Steering Committee with the Philippines.²⁹

As the second major European military power alongside France, the United Kingdom, which also possesses a wide range of power projection capabilities, including two aircraft carriers and attack submarines, also has significantly more mechanisms for security and intelligence-sharing than other Europeans with selected Indo-Pacific states, in particular with the UAE.³⁰ The United Kingdom conducts joint training and officer exchanges with multiple partner armed forces in the Indo-Pacific, and shares military intelligence. Most importantly, British forces are stationed in the UAE.³¹ The United Kingdom also has well-developed trade and investment ties, particularly with the Philippines and the UAE. Part of these are bilateral investment treaties,³² and Joint Economic Committees, planned in the case of the Philippines, with both the Indo-Pacific countries.³³

Of the European states discussed here, Italy and Spain are outliers as neither country has particularly strong relations in any of the investigated dimensions, though both have publicly emphasised the importance of the Indo-Pacific region. This is not surprising since Italy and

26 Pieter D. Wezeman, Justine Gadon, and Siemon T. Wezeman, 'Trends in International Arms Transfers, 2022' (Stockholm International Peace Research Institute, March 2023), https://www.sipri.org/sites/default/files/2023-03/2303_at_fact_sheet_2022_v2.pdf.

27 Karl Lester Yap M, 'Philippines, France Agree to Start Defense Pact Negotiations', *Bloomberg.Com*, 2 December 2023, <https://www.bloomberg.com/news/articles/2023-12-02/philippines-france-agree-to-start-defense-pact-negotiations>.

28 '25th Anniversary of the Indo-French Strategic Partnership: Towards a Century of French-Indian Relations'; Shankar Bharti and Singh, 'India and France Bilateral Partnership for Advancing Strategic Autonomy in the Indo-Pacific Region'.

29 'French Ambassador Visits Clark Freeport Zone', *Ambassade de France aux Philippines et en Micronesie*, 31 July 2019, <https://ph.ambafrance.org/French-Ambassador-visits-Clark-Freeport-Zone>.

30 William D. James, 'Tailored, Tokenistic, or Too Much? Assessing the Royal Navy's Presence in the Indo-Pacific' (The Hague, Netherlands: The Hague Centre for Strategic Studies (HCSS), February 2023), 5, <https://hcss.nl/wp-content/uploads/2023/02/01-William-James-Tailored-tokenistic-or-too-much-Assessing-the-Royal-Navy-presence-in-the-Indo-Pacific.pdf>.

31 Melissa Dalton and Hijab Shah, 'Evolving UAE Military and Foreign Security Cooperation: Path Toward Military Professionalism', *Carnegie Middle East Center*, 12 January 2021, <https://carnegie-mec.org/2021/01/12/evolving-uae-military-and-foreign-security-cooperation-path-toward-military-professionalism-pub-83549>.

32 'International Investment Agreements Navigator. United Kingdom', *UNCTAD Investment Policy Hub*, accessed 30 November 2023, <https://investmentpolicy.unctad.org/international-investment-agreements/countries/221/united-kingdom>.

33 Laure Beaufile, 'UK-Philippines Partnership Bolstered by Foreign Secretary Visit', *GOV.UK*, 3 September 2023, <https://www.gov.uk/government/news/uk-philippines-partnership-bolstered-by-foreign-secretary-visit>; 'UK-UAE Inaugural Strategic Dialogue 2023: Joint Communiqué', *GOV.UK*, 17 May 2023, <https://www.gov.uk/government/news/united-kingdom-united-arab-emirates-inaugural-strategic-dialogue-2023-joint-communique>.

Spain consider their more immediate security challenges to come from the more proximate Mediterranean and Northern Africa. Their diplomatic efforts are therefore focused closer to home. It is important to note, however, that Italy previously had closer ties with the UAE, as it was the UAE's 4th largest arms supplier until 2016,³⁴ and had access to al Minhad airbase.³⁵ However, when Italy stopped missiles sales to the UAE, Italian troops were asked to vacate the base in 2021.³⁶

Given that all but one of the examined European states are members of the European Union, we also assessed the bloc's bilateral relations as a whole. EU engagement is centred around trade and investment. This is logical as the European Union remains an economic powerhouse, but weak on defence integration. EU trade relations are strongest with India and Thailand. With both countries, the bloc has strong import and export ties,³⁷ as well as ongoing negotiations for free trade agreements.³⁸ The EU's trade and investment relations cannot be separated from the bilateral ties of its member states with Indo-Pacific countries; agreements negotiated by the region as a whole also apply to members, which can significantly boost individual bilateral relationships. While the European Union, finally, does not generally have defence relations, security ties with India are a notable outlier. They include joint naval exercises in 2021 and 2023.³⁹

Table 3 below summarises the findings of our analysis across all dimensions and states.

34 Frank Slijper, 'Under the Radar: The United Arab Emirates, Arms Transfers and Regional Conflict' (Utrecht: PAX, October 2017), <https://paxforpeace.nl/wp-content/uploads/sites/2/import/import/pax-report-under-the-radar--arms-trade.pdf>.

35 Raya Jalabi, 'UAE Sets Deadline for Italy to Vacate Airbase, Italian Government Source Says', *Reuters*, 28 June 2021, sec. Aerospace & Defense, <https://www.reuters.com/business/aerospace-defense/uae-sets-deadline-italy-vacate-airbase-italian-government-source-says-2021-06-28/>.

36 Jalabi.








37 Absolute trade figures were taken from the European Commission. These were compared with data from Observatory of Economic Complexity, which provides information on trade between all states, to create the ranking. The European data was first converted into a percentage, and then checked against the other percentages given.

38 'India', European Commission, accessed 11 October 2023, https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/india_en; Krishnamurthy and Ghiasy, 'The Transitioning Security Order in the Indo-Pacific: Furthering India-EU and Triangular Collaboration'; 'Thailand', European Commission, accessed 11 October 2023, https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/thailand_en.

39 'EU-India Joint Naval Exercise', European Union External Action, 21 June 2021, https://www.eeas.europa.eu/eeas/eu-india-joint-naval-exercise-0_en; 'Gulf of Guinea: EU and India Carry out Joint Naval Exercise'.

Table 3. Overview of bilateral relations between selected European and “inbetweener” Indo-Pacific states



		Indonesia	Vietnam	Philippines	Thailand	India	UAE
	Security	MEDIUM LOW	LOW	LOWEST	LOWEST	LOW	LOW
	Trade	MEDIUM HIGH	HIGH	MEDIUM HIGH	HIGH	HIGH	MEDIUM
	Capacity building	HIGHEST	MEDIUM	MEDIUM LOW	MEDIUM	HIGH	MEDIUM
	Security	HIGH	MEDIUM HIGH	MEDIUM HIGH	LOWEST	HIGHEST	MEDIUM HIGH
	Trade	LOW	MEDIUM	MEDIUM HIGH	MEDIUM HIGH	MEDIUM LOW	MEDIUM
	Capacity building	MEDIUM HIGH	HIGH	HIGH(EST)	LOW	HIGHEST	LOW
	Security	LOW	LOW	LOW	LOW	MEDIUM	LOW
	Trade	MEDIUM HIGH	HIGH	MEDIUM HIGH	MEDIUM HIGH	HIGH	MEDIUM HIGH
	Capacity building	HIGH	MEDIUM HIGH	MEDIUM HIGH	MEDIUM	HIGH	LOW
	Security	MEDIUM LOW	MEDIUM	MEDIUM LOW	MEDIUM	MEDIUM	MEDIUM HIGH
	Trade	MEDIUM HIGH	MEDIUM HIGH	HIGH	MEDIUM HIGH	MEDIUM HIGH	HIGH
	Capacity building	MEDIUM	MEDIUM HIGH	MEDIUM	MEDIUM	MEDIUM	LOW
	Security	LOWEST	LOW	LOWEST	LOWEST	MEDIUM LOW	LOWEST
	Trade	MEDIUM	MEDIUM HIGH	MEDIUM LOW	MEDIUM LOW	MEDIUM	MEDIUM
	Capacity building	LOW	MEDIUM LOW	LOW	LOW	LOW	LOWEST
	Security	LOWEST	LOW	LOWEST	LOWEST	LOWEST	LOW
	Trade	LOW	MEDIUM LOW	MEDIUM	LOW	MEDIUM	MEDIUM LOW
	Capacity building	LOWEST	LOW	MEDIUM	LOWEST	LOW	LOW
	Security	LOWEST	LOWEST	LOWEST	LOWEST	MEDIUM	LOWEST
	Trade	HIGH	HIGH	HIGH	HIGH(EST)	HIGH(EST)	HIGH
	Capacity building	MEDIUM LOW	LOW	LOW	MEDIUM LOW	MEDIUM	LOWEST

American and Chinese strengths and weaknesses in engagement with the Indo-Pacific

Whatever influence European states can have individually or collectively, however, pales when compared to the intensity of ties between regional states and the two superpowers. The United States and China have both developed strong ties with all countries in our selection of inbetween states that have both capacity, but limited affinity on values. The United States has significant capacities across all three dimensions of security and intelligence, trade and investment, and capacity-building and infrastructure; it is especially unparalleled in its military engagement in the Indo-Pacific. While Chinese capabilities are also highly developed across all dimensions, the country is most active within the region in trade and investment – even more so than the United States. This is in line with existing scholarship that demonstrates that Southeast Asian states tend to turn to the United States for security, but deepen their economic ties with China, hedging between the two great powers in the region.⁴⁰

The United States has its strongest relations in security and intelligence, and trade and investment. On security engagement, the country is a major arms provider, conducts joint exercises and training, shares intelligence, and has access to military bases in several locations. Such ties are particularly well developed with Thailand, including through military exercises, such as Cobra Gold and US access to Thai bases.⁴¹ Indonesia, which launched a 2+2 Foreign Policy and Defence Dialogue with the United States in 2023,⁴² and the UAE, where US military personnel is stationed in UAE bases,⁴³ are also strong defence partners. The most important American trade partners, in turn, are Indonesia, the Philippines, and Vietnam. In particular, their close relations stem from well-developed import, export and investment ties, and Trade and Investment Framework Agreements, which the US has with Indonesia and the Philippines.⁴⁴ Finally, of all the countries surveyed, the United States has the most developed ties on capacity-building and infrastructure investment in the region. Indonesia is a particularly strong partner in this dimension. This covers a broad range of issues, from education,⁴⁵ to energy, and sustainability.⁴⁶

40 G. John Ikenberry, 'Between the Eagle and the Dragon: America, China, and Middle State Strategies in East Asia', *Political Science Quarterly* 131, no. 1 (2016): 9–43; Bonny Lin et al., 'U.S. Versus Chinese Powers of Persuasion: Does the United States or China Have More Influence in the Indo-Pacific Region?', Research Briefs (RAND Corporation, 12 November 2020), https://www.rand.org/pubs/research_briefs/RB10137.html.

41 'The United States-Thailand Relationship', U.S. Department of State, Office of the Spokesperson, 9 July 2022, <https://www.state.gov/the-united-states-thailand-relationship/>. Emma Chanlett-Avery and Ben Dolven, 'Thailand: Background and U.S. Relations', In Focus (Congressional Research Service, 1 September 2023), <https://sgp.fas.org/crs/row/IF10253.pdf>.

42 'Joint Statement on the United States-Indonesia Senior Officials' 2+2 Foreign Policy and Defence Dialogue', U.S. Department of Defense, 23 October 2023, <https://www.defense.gov/News/Releases/Release/Article/3566363/joint-statement-on-the-united-states-indonesia-senior-officials-22-foreign-poli/> <https://www.defense.gov/News/Releases/Article/3566363/joint-statement-on-the-united-states-indonesia-senior-officials-22-foreign-poli/>.

43 Jeremy M. Sharp, 'The United Arab Emirates (UAE): Issues for U.S. Policy', CRS Reports (Congressional Research Service, 13 September 2023), <https://sgp.fas.org/crs/mideast/RS21852.pdf>.

44 'Indonesia', Office of the United States Trade Representative, accessed 24 October 2023, <http://ustr.gov/countries-regions/southeast-asia-pacific/indonesia>; 'U.S. Relations With the Philippines', U.S. Department of State, Bureau of East Asian and Pacific Affairs, 23 February 2023, <https://www.state.gov/u-s-relations-with-the-philippines/>.

45 'U.S. Relations With Indonesia', United States Department of State, 19 April 2022, <https://www.state.gov/u-s-relations-with-indonesia/>.

46 'Joint Statement on the United States-Indonesia Senior Officials' 2+2 Foreign Policy and Defence Dialogue'.

China's major strength is trade and investment. In fact, among all examined countries, China has the most economic influence in the Indo-Pacific region, having developed close ties with Indonesia and Vietnam, but also Thailand and the UAE. The main drivers of this are export, import and investment, the ASEAN-China free trade agreement,⁴⁷ and the Regional Economic Partnership Agreement.⁴⁸ With Vietnam, for instance, China ranks very high on export and import,⁴⁹ and has a bilateral investment treaty.⁵⁰ From 2022 to 2023, moreover, it moved up to be Vietnam's second-largest source of FDI (from previously the sixth).⁵¹ Notably, China also has considerable influence in the dimension of capacity-building and infrastructural assistance. This stems particularly from the Belt and Road Initiative, which contributes to large-scale infrastructure development, and counts Indonesia, Thailand, the UAE, and Vietnam as its members.⁵² However, the Philippines abandoned the framework in 2023.⁵³ Chinese defence ties, finally, are weaker than those of the United States (and France and the UK), but still remain very strong particularly with Thailand. This includes, among other things, an annual military exercises.⁵⁴

Table 4 summarises the findings of the analysis of Chinese and US ties in the Indo-Pacific.

47 'Thailand and China to Expand Free Trade Agreement (FTA)', Thailand Business News, 27 February 2023, <https://www.thailand-business-news.com/china/96693-thailand-and-china-to-expand-free-trade-agreement-fta>.

48 'Regional Comprehensive Economic Partnership Agreement (RCEP)', Australian Government Department of Foreign Affairs and Trade, accessed 30 November 2023, <https://www.dfat.gov.au/trade/agreements/in-force/rcep>.

49 'Vietnam', The Observatory of Economic Complexity, accessed 30 November 2023, <https://oec.world/en>.

50 'International Investment Agreements Navigator. Viet Nam', UNCTAD Investment Policy Hub, accessed 30 November 2023, <https://investmentpolicy.unctad.org/international-investment-agreements/countries/229/viet-nam>.



51 'FDI Attraction Situation in Vietnam and Vietnam's Overseas Investment in the First Nine Months of 2023', Ministry of Planning and Investment of the Socialist Republic of Vietnam, 27 September 2023, <https://www.mpi.gov.vn/en/Pages/2023-9-29/FDI-attraction-situation-in-Vietnam-and-Vietnam-s-c8n1uj.aspx>; Son Ninh, Dinh Truong, and Vo Phong, 'Vietnam-China: Comprehensive Strategic Cooperative Partnership under Continuous Development', NhanDan, accessed 12 October 2023, <https://special.nhandan.vn/vietnam-china/>.

52 Binsal Abulkader and Firas Fadel Hassan, 'China-UAE Bilateral Trade Rises 28% to Exceed \$64 Bn during 1st 8 Months of 2022: Chinese Envoy', Emirates News Agency, 3 November 2022, <https://www.wam.ae/en/details/1395303098069>; Derek Cai, 'China Belt and Road: Indonesia Opens Whoosh High-Speed Railway', BBC News, 2 October 2023, sec. Asia, <https://www.bbc.com/news/world-asia-66979810>; 'China's Belt and Road Initiative to Reshape Routes in Thailand and the Broader South-East Asian Region', Oxford Business Group, accessed 30 November 2023, <https://oxfordbusinessgroup.com/reports/thailand/-report/economy/on-the-road-chinas-belt-and-road-initiative-is-reshaping-south-east-asia-3>; Viet Dung Trinh and Huy Hai Do, 'Vietnam Hedges Its Bets on the BRI', East Asia Forum, 15 March 2023, <https://www.eastasiaforum.org/2023/03/15/vietnam-hedges-its-bets-on-the-bri/>.

53 Tommy Walker, 'Philippines Drops China's Belt and Road as Tensions Flare', DW, 11 August 2023, sec. Politics, <https://www.dw.com/en/philippines-drops-chinas-belt-and-road-as-tensions-flare/a-67344929>.

54 Sasiwan Chingchit, 'The Curious Case of Thai-Chinese Relations: Best Friends Forever?', The Asia Foundation, 30 March 2016, <https://asiafoundation.org/2016/03/30/the-curious-case-of-thai-chinese-relations-best-friends-forever/>.

Table 4. Overview of bilateral relations between China and the US, and selected Indo-Pacific inbetweeners states

		Indonesia	Vietnam	Philippines	Thailand	India	UAE
	Security	MEDIUM	LOWEST	LOWEST	HIGH(EST)	MEDIUM	LOW
	Trade	HIGHEST	HIGHEST	HIGH	HIGH(EST)	HIGH	HIGH(EST)
	Capacity building	HIGH	MEDIUM	LOW	HIGH	LOWEST	HIGH
	Security	HIGH(EST)	MEDIUM HIGH	MEDIUM HIGH	HIGHEST	HIGH	HIGH(EST)
	Trade	HIGH(EST)	HIGH(EST)	HIGH(EST)	HIGH	HIGH	MEDIUM
	Capacity building	HIGHEST	HIGH	HIGH	HIGH	MEDIUM HIGH	MEDIUM-LOW

To conclude, among all the European states under investigation, only France and the United Kingdom have serious defence, security, and intelligence ties with Indo-Pacific countries. Even though Germany and the Netherlands lack such defence ties, they have well-developed relations on trade and investment, with the Netherlands also being strong on capacity-building and infrastructure development. Italy and Spain, finally, despite stating that the Indo-Pacific was a region of growing importance, as of yet, fail to make serious inroads into engagement with Indo-Pacific states. All this, however, is put into stark relief in comparison to the involvement of China and the United States in the Indo-Pacific.

Implications

The overview of bilateral relations between European states and selected states in the Indo-Pacific that have a high to medium capacity to contribute to maritime security, but medium affinity with European values, underlines that European strengths in the region are predominantly located in the domains of trade and investment, and capacity-building and infrastructure. Though security and intelligence ties are significantly stronger for France and the UK than Germany and the Netherlands, let alone Spain and Italy, European states' capabilities in this domain remain limited when it comes to engaging with Indo-Pacific states. This is particularly apparent when compared to the US role in the region; however, both the US and China on the whole have more intense bilateral relations across all three policy dimensions.

Should Europeans want to strengthen their ties with Indo-Pacific partners, greater investment in security and intelligence is less likely to have a short- or medium-term return on investment than further deepening trade and investment, and capacity-building and infrastructure ties; Europeans have a great deal of catching up to do with both China and the US.⁵⁵

However, the needs for each regional state vary significantly even when it comes to trade and investment and capacity building and infrastructure, where Europeans fare quite well overall; the UAE is less likely to need capacity-building than Indonesia, though investment in climate mitigation strategies could be an avenue for both. European efforts should hence be tailored to each Indo-Pacific state, as no one-fits-all approach would yield optimal results

⁵⁵ An exception to this logic is France, which has obligations to protect French citizens in its Indo-Pacific territories.

and contribute to the formation of long-standing ties with regional small and medium powers. The end-goal of these efforts should be clear; strengthening ties with regional states is a bottom-up effort to solidify the multilateral maritime order within the Indo-Pacific. It could ensure that these states put their efforts towards joint maritime law enforcement, anti-piracy, and other maritime missions, as well as adding to the strength of legal dispute settlements.

With whom to focus European efforts is however not straightforward. In relative terms, European states, and particularly France, can see greater returns on their efforts in deepening ties with India. There are two reasons why European-Indian ties are particularly important: India is the great power within the Indian Ocean basin where Europeans themselves have greater capacity to add to maritime security in the Indo-Pacific and it is a future global super-power; India's foreign policy is also still in the process of shifting away from its non-aligned, but practically pro-Russian, position. Similarly, the UAE occupies a key position in the Gulf, and is therefore an important partner for Europe's attempts to strengthen the maritime order in the Western Indian Ocean. Due to the Sino-American competition, Southeast Asia is likely to be a particularly contested region, where the United States, China, and others, amongst which European states, will struggle for greater influence. At the same time, Europeans cannot neglect the Southeast Asian states as these are crucial for maritime security near key chokepoints that connect the Indian Ocean to the Western Pacific. Openings for cooperation are still present, as demonstrated by the recent Franco-Filipino talks for a Status of Visiting Forces Agreement. Lastly, Europeans should not forget to invest in deepening ties with those states closer to home, where regular deployments are most likely to occur. Figures 10, 11 and 12 below illustrate the bilateral relations of the examined states.

Figure 10. Overview of bilateral relations in capacity building and infrastructure between selected Indo-Pacific countries with European states, China, and the United States

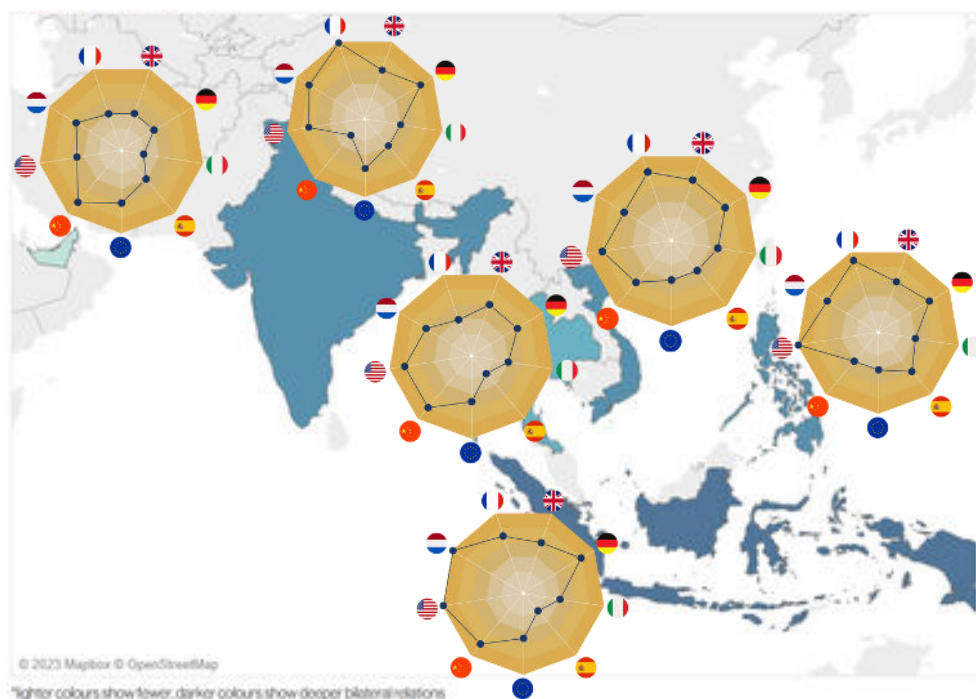


Figure 11. Overview of bilateral relations in security and intelligence between selected Indo-Pacific countries with European states, China, and the United States

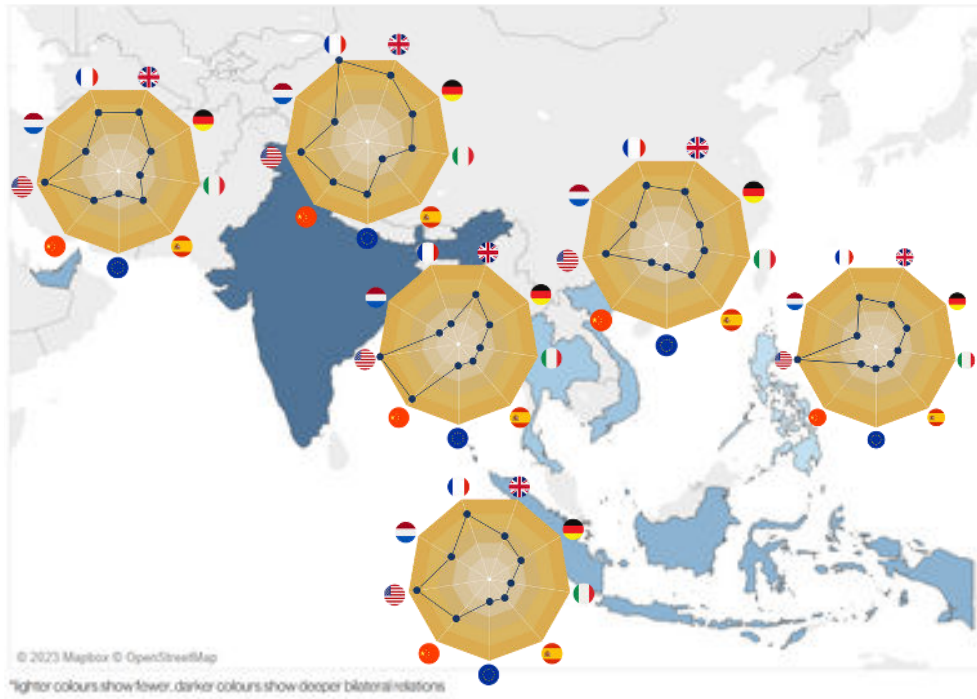
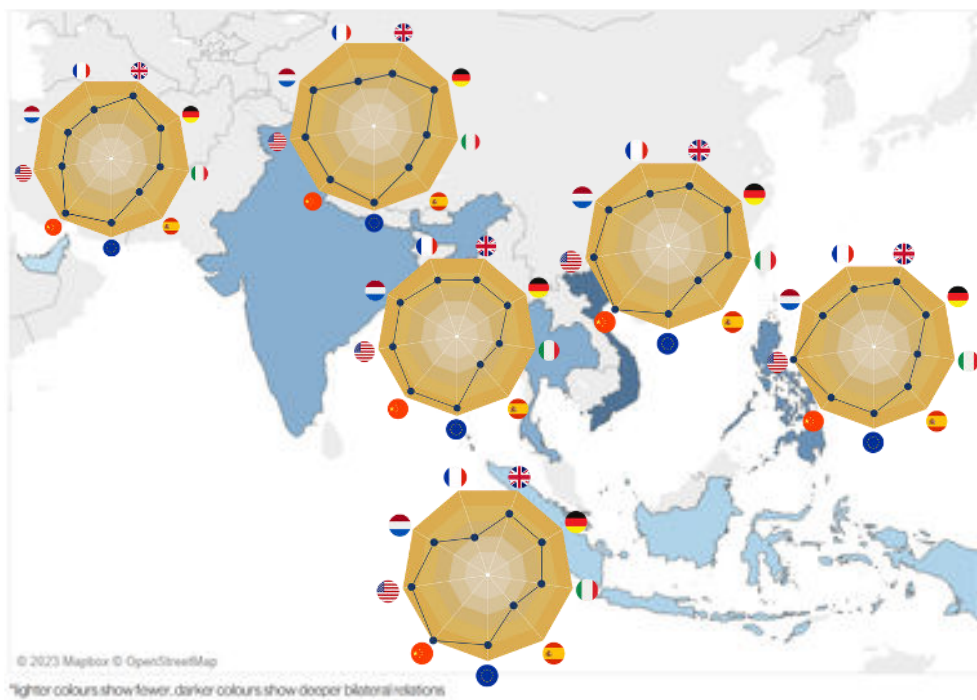


Figure 12. Overview of bilateral relations in trade and investment between selected Indo-Pacific countries with European states, China, and the United States



Conclusions and policy recommendations

Europeans are playing a greater role in the Indo-Pacific as a consequence of the intensifying Sino-American competition, as well as the continuing shift of the world's economic and political center of gravity from the Atlantic to the Indo-Pacific. The Indo-Pacific includes multiple maritime chokepoints that are crucial for European-Asian trade.⁵⁶ Given the massive distances involved, and the limited European capacity to single-handedly protect these commons, partnerships with regional powers are of key importance. These partnerships are key instruments to strengthen a multilateral maritime order, which foregrounds shared interests, institutional and legal resolutions to disputes, and maritime security writ large.

Which states in the Indo-Pacific Europeans can best partner with is not obvious, however, nor where European strengths are primarily located at present.

The brief therefore first looks to order which states have the capacity to contribute to maritime security, and which states have greater affinity with European values. The analysis shows – in line with our earlier findings⁵⁷ – that states such as Australia, Japan, and South Korea, with which Europeans have already deepened their ties over the past decade, are the regional powers that have the highest capacity to contribute to maritime security, and the greatest affinity with Europeans. Most of the states in the Indo-Pacific, however, fall into a much more complex category of high or medium capacity, but limited affinity with European values. These states are located across Southeast Asia and alongside the Indian Ocean basin. Most of the key maritime chokepoints are proximate to these states. From a European perspective, much can be gained or lost depending on whether European states can collaborate with these regional states on strengthening the institutions of a multilateral maritime order, thereby contributing to conflict prevention and resolution, and maritime access.

The second part of the brief therefore looks at which bilateral ties key European states, and the EU as a collective, already maintain with a selection of states from this more complex category of states in the middle group: India (which has high capacity), and Indonesia, the Philippines, Thailand, the United Arab Emirates (UAE), and Vietnam (which all have medium capacity). It looks at ties in the policy domains of security and intelligence; trade and investment; and capacity-building and infrastructure. It contrasts the relative intensity of the European-Indo-Pacific ties of Europe with those of the United States and China in the region. The second section finds that European states, unsurprisingly, have strong ties with the region when it comes to trade and investment, and capacity-building and infrastructure, but weaker ones when it comes to the security and intelligence. The exceptions are the UK and

⁵⁶ Girardi, van Hooft, and Cisco, 'What the Indo-Pacific Means to Europe: Trade Value, Chokepoints, and Security Risks'.

⁵⁷ Van Hooft, Girardi, and Sweijts, 'Guarding the Maritime Commons: What Role for Europe?'

especially France which has strong ties especially with India. However, it is apparent that especially Southeast Asia is primarily, though not exclusively, a battleground for the American and Chinese.

Based on the analysis, we therefore offer the following recommendations:

1. While key Indo-Pacific partners such as Australia, Japan, and South Korea, will continue to be the bedrock of European engagement with the Indo-Pacific on maritime security due to their high capacity and close affinity with European values, there is a much larger group of inbetween states that have medium to high capacity but more limited affinity that need greater engagement on the part of Europe.
2. To solidify the maritime order in the Indo-Pacific, European states like the Netherlands should build on existing European strengths in trade and investment and capacity building. Deeper ties on security and intelligence are also welcome, but the added value of Europeans is likely to be more limited, due to the lack of independent military and intelligence capabilities that are sufficient to meaningfully contribute in this field.
3. Approaches should be differentiated by country; Southeast Asia is important but Europeans should be aware that the competition for influence in the region is contested between the superpowers, and that their own influence is more limited. In contrast, if they deepen their ties to India, Europeans actually have greater manoeuvre space and more avenues to shape the relationship. The same applies to the UAE as a partner for strengthening maritime security in the Western Indian Ocean.
4. The forthcoming European, and particularly Dutch, naval presence in the region should therefore be part of a comprehensive, whole-of-government approach that looks to further solidify these ties with the regional states. Port visits can be a powerful symbolic opening of the door, though a consistent, long-term strategy is needed to keep the door open.

In sum, as the center of gravity of global politics and trade shifts to the Indo-Pacific, and the dependencies on free and open maritime trade routes in the region grown, Europeans cannot afford to passively fall into the slipstream of the Sino-American competition, but need to proactively and collaboratively shape the order in the region with Indo-Pacific partners.

Annex

Annex 1: Operationalisation of International Affinity and Maritime Security Relevance

Concept		Research Question	Indicator	Data
Affinity		Is the country democratic?	Regime type (democracy, anocracy, autocracy)	Polity 5
		Does the country respect principles of rule of law and judicial freedom?	Rule of Law (strong, medium, weak)	V-Dem database
		Is the country a champion or significant underminer of human rights?	Human rights record (free, partly free, not free)	Freedom House (Freedom in the World status)
		Does the country adhere to principles of mare liberum?	Participation in UNCLOS (party, signatory)	Manual Coding from the United Nations Convention on the Law of the Sea
		Does the country support liberal economic values?	Economic openness (high, medium, low)	International Property Rights Index (overall score)
		What is the country's environmental performance?	Environmental performance (high, medium, low)	Environment Performance Index (EPI Score)
Maritime Security Relevance	Political	Is the country a member of maritime security organizations and agreements?	Membership of a country to maritime security organisations and agreements	Manual Coding from websites of maritime security organisations and agreements
		What is the country's potential influence capacity?	International influence (Very high, high, moderate, limited)	Formal Bilateral Influence Capacity Index
		What is the level of the country's diplomatic representation?	Diplomatic representation (High, medium, low)	Diplometrics
	Navy	Does the country have strong military coercive capabilities?	Share of international military power (Super, major, regional, minor)	Global Power Index
		What type of navy does the country have?	Type of Navy (Multi-regional power projection, regional power projection, regional offshore coastal defense, Inshore constabulary, token navies)	Military Balance 2023
	Airforce	What aircraft generation does the country have?	Level of aircraft generation (5th, 4th, 3rd, 2nd, 1st)	Military Balance 2023
		Does the country have anti-ship cruise missiles?	Possession of anti-cruise ship missiles	Military Balance 2023
		Does the country have ballistic missiles and what is their range?	Possession of ballistic missiles and range?	Military Balance 2023

Annex 2: Value affinity and Maritime security relevance assessment

VALUE AFFINITY

Country	Regime Type	Rule of Law	Human Rights	UNCLOS	Economic Openness	Environmental Performance	Assessment
Australia	Democracy	Strong	Free	Party	High	High	High
Bahrain	Autocracy	Weak	Not Free	Party	Medium	Medium	Low
Brunei	N/A	N/A	Not Free	Party	Medium	Medium	Medium
Cambodia	Anocracy	Weak	Not Free	Signatory	N/A	Low	Low
China	Autocracy	Medium	Not Free	Party	Medium	Low	Low
Djibouti	Anocracy	Medium	Not Free	Party	N/A	Medium	Medium
Egypt	Anocracy	Weak	Not Free	Party	Medium	Medium	Medium
Eritrea	Autocracy	Weak	Not Free	N/A	N/A	Medium	Medium
India	Democracy	Medium	Partly Free	Party	Medium	Low	Medium
Indonesia	Democracy	Medium	Partly Free	Party	Medium	Medium	Medium
Iran	Autocracy	Weak	Not Free	Signatory	Medium	Medium	Low
Japan	Democracy	Strong	Free	Party	High	High	High
Kuwait	Autocracy	Medium	Partly Free	Party	Medium	Medium	Medium
Malaysia	Democracy	Medium	Partly Free	Party	Medium	Medium	Medium
Myanmar	Autocracy	Medium	Not Free	Party	N/A	Low	Low
North Korea	Autocracy	Weak	Not Free	Signatory	N/A	N/A	Low
Oman	Autocracy	Medium	Not Free	Party	Medium	Medium	Medium
Pakistan	Anocracy	Medium	Partly Free	Party	Medium	Medium	Medium
Philippines	Democracy	Medium	Partly Free	Party	Medium	Medium	Medium
Qatar	Autocracy	Medium	Not Free	Party	High	Medium	Medium
Saudi Arabia	Autocracy	Medium	Not Free	Party	Medium	Medium	Medium
Singapore	Anocracy	Strong	Partly Free	Party	High	Medium	Medium
Somalia	Anocracy	Weak	Not Free	Party	N/A	N/A	Medium
South Korea	Democracy	Strong	Free	Party	Medium	Medium	High
Sri Lanka	Democracy	Medium	Partly Free	Party	Medium	Medium	Medium
Taiwan	Democracy	Strong	Free	N/A	High	Medium	High
Thailand	Anocracy	Medium	Not Free	Party	Medium	Medium	Medium
Timor-Leste	Democracy	Medium	Free	Party	N/A	Low	Medium
UAE	Autocracy	Medium	Not Free	Signatory	High	Medium	Medium
Vietnam	Autocracy	Medium	Not Free	Party	Medium	Low	Medium
Yemen	Anocracy	Weak	Not Free	Party	N/A	N/A	Medium

MARITIME SECURITY RELEVANCE

Country	Maritime Security Organisations and agreements	Influence	Diplomacy	Military Power	Navy	Aircraft generation	Anti ship cruise missiles	Ballistic missiles range	Assessment
Australia	High	High	Medium	Regional	Regional power-projection	5	Yes	NO	High
Bahrain	Low	Limited	Low	Minor	Regional offshore coastal defence	4	Yes	NO	Low
Brunei	Medium	Limited	Low	Minor	Regional offshore coastal defence	0	Yes	NO	Low
Cambodia	Medium	Limited	Low	Minor	Inshore constabulary	0	No	NO	Low
China	Low	Very High	High	Super	Multi-regional power-projection	5	Yes	NO	High
Djibouti	Low	Limited	Low	Minor	NO	0	No	NO	Low
Egypt	Medium	Moderate	High	Minor	Regional power-projection	4	Yes	Local Sea Denial	Medium
Eritrea	Low	Limited	Low	Minor	Inshore constabulary	4	No	NO	Low
India	Medium	High	Medium	Major	Multi-regional power-projection	4	Yes	Regional Deterrence	High
Indonesia	Medium	High	Medium	Regional	Regional offshore coastal defence	4	Yes	NO	Medium
Iran	Low	Moderate	Medium	Regional	Regional power-projection	4	No	Local Sea Denial	Medium
Japan	Low	High	High	Major	Regional power-projection	5	Yes	NO	High
Kuwait	Low	Moderate	Medium	Minor	Regional Offshore Constabulary	4	Yes	NO	Medium
Malaysia	Medium	High	Medium	Minor	Regional offshore coastal defence	4	Yes	NO	Medium
Myanmar	Low	Limited	Low	Minor	Inshore constabulary	4	No	NO	Low
North Korea	Low	Limited	Medium	Minor	Regional power-projection	4	Yes	Global Deterrence	Medium
Oman	Low	Moderate	Medium	Minor	Regional offshore coastal defence	4	Yes	NO	Medium

MARITIME SECURITY RELEVANCE

Country	Maritime Security Organisations and agreements	Influence	Diplomacy	Military Power	Navy	Aircraft generation	Anti ship cruise missiles	Ballistic missiles range	Assessment
Pakistan	Low	Moderate	Medium	Regional	Regional power-projection	4	Yes	Regional Deterrence	Medium
Philippines	Medium	Moderate	Medium	Minor	Inshore constabulary	4	No	NO	Medium
Qatar	Low	Moderate	Medium	Minor	Regional offshore coastal defence	4	Yes	Local Sea Denial	Medium
Saudi Arabia	Low	High	High	Regional	Regional offshore coastal defence	4	Yes	Regional Deterrence	High
Singapore	Medium	High	Low	Minor	Regional offshore coastal defence	4	Yes	NO	Medium
Somalia	Low	Limited	Low	Minor	NO	0	No	NO	Low
South Korea	Medium	High	Medium	Regional	Regional power-projection	5	Yes	Local Sea Denial	High
Sri Lanka	Low	Limited	Low	Minor	Inshore constabulary	3	No	NO	Low
Taiwan	Low	Moderate	Low	Minor	Regional power-projection	4	Yes	Local Sea Denial	Medium
Thailand	Medium	High	Medium	Minor	Regional offshore coastal defence	4	Yes	NO	Medium
Timor-Leste	Low	Limited	Low	Minor	Inshore constabulary	0	No	NO	Low
UAE	Medium	High	Medium	Minor	Regional offshore coastal defence	4	Yes	NO	Medium
Vietnam	Medium	High	Medium	Minor	Inshore constabulary	4	Yes	Local Sea Denial	Medium
Yemen	Low	Limited	Medium	Minor	NO	0	No	Local Sea Denial	Low



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