

**PANORAMA**  
INSIGHTS INTO ASIAN  
AND EUROPEAN AFFAIRS

# **European Perspectives on Maritime Security in the Indo-Pacific**



## **Panorama 2025/Issue 1**

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## Preface

Maritime security in the Indo-Pacific has rapidly moved from a peripheral to a central concern in European foreign and security policy. As the region becomes a decisive arena for global geopolitical competition – marked by China’s maritime assertiveness, minilateral frameworks like AUKUS and the Quad, and intensifying hybrid threats – Europe’s strategic presence, normative influence, and operational credibility are being put to the test.

This *Panorama: Insights into Asian and European Affairs* volume offers a timely collection of European perspectives on the role and future of maritime security in the Indo-Pacific. Drawing on academic insights, policy expertise, and practitioner experience, this volume follows a structured trajectory: it opens by examining Europe’s evolving strategic posture in the region, moves to its emerging cooperation frameworks with key partners, reflects on concrete operational lessons and challenges, and concludes by outlining key implications for Europe’s long-term engagement in the maritime domain.

The opening chapter by Jérémy Bachelier sets the tone by calling for a pragmatic, credible European Union (EU) posture in an increasingly contested Indo-Pacific. Andrea Passeri provides an external lens on Europe’s transition from civilian power to emergent security actor, as seen from Southeast Asia. Jean-Loup Samaan offers a much-needed assessment of the EU’s naval engagement in the Red Sea – Operation ASPIDES – unpacking the operational and political limits of Europe’s maritime ambitions. Abel Manullang then suggests an underexplored pathway for European engagement – through coast guard diplomacy – while Heiko Herold asks whether European naval forces are prepared for a sustainable role in the Indian Ocean.

Subsequent contributions shift focus to strategic infrastructures and parallel threats. Gabriele Marchionna explores submarine cable networks as a strategic imperative, while Prof. Maren Tomforde draws connections between Europe’s own ICAD (Illegal, Coercive, Aggressive and Deceptive) challenges and maritime threats in the Indo-Pacific. The volume then turns to bilateral and multilateral cooperation efforts, with Jason Cox and Kenji Obayashi analysing evolving EU partnerships with South Korea and Japan, respectively – highlighting the necessary move from economic to strategic alignment.

Stella Kim and Priyanshu Agarwal delve into the geopolitical entanglements of Chinese-Russian military relations and energy interdependence, underscoring the indirect consequences of European policy shifts.

The publication of this *Panorama* Issue could not be more timely, as it gained further urgency in light of recent developments – such as the reported laser attack by a Chinese warship on a German military aircraft during the ASPIDES Mission at the beginning of July 2025. The EU and, previously, Germany's Federal Foreign Office have summoned the Chinese ambassadors – a diplomatic tool used by host governments to signal clear displeasure and discontent with another state's actions. This can be interpreted as a test of how the new federal German government responds to hybrid attacks originating from China.

The volume concludes with a sober yet forward-looking analysis by Eva Pejsova and Piero Barlucchi, who ask whether Europe is becoming an actor or simply a factor in Indo-Pacific maritime security. They argue that the EU must move beyond episodic deployments and scattered frameworks towards a more integrated, sustained, and partner-oriented maritime strategy.

This issue also marks an important milestone for the Konrad Adenauer Foundation (KAS). Maritime security has been identified as a key theme of our Asia portfolio, and the Foundation will soon launch its **Maritime Security Advisory Network (MSAN)** – a platform bringing together experts and practitioners working on maritime security in the Indo-Pacific. The network aims to foster dialogue, share best practices, and support resilient and rules-based maritime governance.

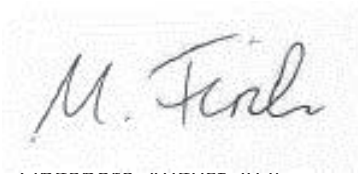
I would also like to invite readers to explore the Konrad Adenauer Foundation's work on security policy in Germany, examining links and parallels between the Indo-Pacific and Europe: <https://www.kas.de/en/web/schwerpunktthemen/security>

Taken together, this volume encourages us to rethink Europe's role in the Indo-Pacific – not as a passive observer of great-power rivalry, but as a contributor to shared security, legal norms, and sustainable maritime resilience.

The Konrad Adenauer Foundation wishes to thank all the authors for their valuable contributions to this *Panorama* Issue and expresses its special gratitude and appreciation to H.E. Iwona Piórko, European Union Ambassador to Singapore, for kindly agreeing to provide the Foreword on 'European Perspectives on Maritime Security'.

We wish you an inspiring read!

Sincerely yours

A handwritten signature in dark ink, appearing to read 'M. Fink', on a light-colored, slightly textured background.

Singapore, August 2025

**Moritz Fink**

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## Foreword

Though geographically distant, the Indo-Pacific and the European Union (EU) maintain a strong and active presence in each other's regions. Our relationship is shaped by trade and investment, connectivity of all kinds, cultural ties and people-to-people exchanges – and increasingly by shared interests in traditional and economic security.

The Indo-Pacific is the centre of global economic vitality – home to three-fifths of the world's population, accounting for half of global GDP, and hosting many of the world's key trade routes. Rich in natural resources, the region is also uniquely important in the fight against climate change. It includes some of the largest emitters of carbon dioxide and countries for whom rising sea levels pose an existential threat – but it also holds the greatest potential to reverse the trend.

The EU has a strong stake in an open, inclusive, free and stable Indo-Pacific. This commitment lies at the heart of our Strategy for Cooperation in the Indo-Pacific, adopted in 2021 to deepen collaboration with our partners across the region. It is complemented and reinforced by the Strategic Compass for Security and Defence and our updated Maritime Security Strategy from 2023.

Our engagement in the region has an explicit security dimension. Developments in the Indo-Pacific directly affect Europe's security and prosperity – and vice-versa. In an era shaped by growing geopolitical rivalries, the EU supports a region where sovereign, independent countries have the strength to protect their national interests and uphold global rules. Together, we must ensure that might does not make right – not in Europe, and not in the Indo-Pacific.

The EU remains a predictable, reliable and credible partner. As a 'smart security enabler,' we work to strengthen our partners' resilience and response capabilities – in maritime security, but also in areas such as cybersecurity, hybrid threats and foreign information manipulation and interference. We do this also through our cooperative capacity-building projects 'Enhancing Security In and With Asia' (ESIWA), and 'Critical Maritime Routes Indo Pacific' (CRIMARIO), which promotes maritime domain awareness.



Naval deployments further underscore the EU's commitment to upholding freedom of navigation under the UN Convention on the Law of the Sea. Operation ATALANTA has proved indispensable to securing the Gulf of Aden against pirate attacks and has conducted regular joint exercises with Indo-Pacific partners. Since last year, Operation ASPIDES has helped protect merchant vessels in the Red Sea. We have also established a Coordinated Maritime Presence in the North-West Indian Ocean to better coordinate the presence of the naval assets of Member States in that part of the Indo-Pacific. Recent port calls by EU Member States' vessels in Singapore and across the region demonstrate our commitment to ensuring freedom of navigation and secure sea lines of communication.

Singapore is a key partner in maritime security and contributes meaningfully to international efforts – for instance, by hosting the Information Fusion Centre (IFC) and the Regional Cooperation Agreement on Combating Piracy and Armed Robbery against Ships in Asia Information Sharing Centre (ReCAAP ISC). We are proud to have an EU liaison officer at the IFC.

The publication *Panorama: European Perspectives on Maritime Security* is timely and brings together diverse European and Indo-Pacific perspectives, offering a valuable contribution to the global conversation on maritime security.

I warmly thank the Konrad Adenauer Foundation's Policy Dialogue Asia programme for the initiative, and I wish you an interesting and insightful read.



**Iwona Piórko**

European Union Ambassador to Singapore



# EUROPEAN PERSPECTIVES ON MARITIME SECURITY IN THE INDO-PACIFIC

*Jérémy M. Bachelier*

## Executive Summary

Once considered peripheral, the Indo-Pacific has become central to global strategic competition. The European Union (EU), though geographically distant, now considers the region as pivotal to its own stability, economic resilience, and normative reach. The Indo-Pacific's maritime domain underpins global trade, hosts emerging technological powers, and concentrates many of today's most acute geopolitical tensions.

In this context, the EU's growing involvement is driven not only by deep economic interdependence but also by the increasing contestation of the rules-based international order. China's assertive maritime posture, the United States' counterbalancing efforts, and a range of hybrid threats and risks have triggered a progressively more visible – though still loosely coordinated – European response.

The EU Strategy for Cooperation in the Indo-Pacific (2021) outlines a framework rooted in international law, sustainability, and cooperative security.<sup>1</sup> However, amid rising regional instability and the weakening of multilateral norms, a key challenge remains: forging more cohesive, long-term strategic coordination among EU Member States.<sup>2</sup>

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<sup>1</sup> European Union (2021) EU Strategy for Cooperation in the Indo-Pacific. Brussels: European External Action Service (EEAS), [https://www.eeas.europa.eu/eeas/eu-strategy-cooperation-indo-pacific\\_en](https://www.eeas.europa.eu/eeas/eu-strategy-cooperation-indo-pacific_en).

<sup>2</sup> Le Corre, P. (2022) 'The Indo-Pacific and the European Union's New Geostrategic Posture', Carnegie Europe, <https://carnegieeurope.eu/2022/03/10/indo-pacific-and-european-union-s-new-geostrategic-posture-pub-86579>.

## I. A STRATEGICALLY TENSE REGION, KEY FOR THE EUROPEAN UNION

### 1. A Crossroads of Global Rivalries

The Indo-Pacific has emerged as a focal point of global geopolitical competition. Stretching from the eastern coast of Africa to the Americas, it encompasses over 60% of the world's population and facilitates nearly 40% of global maritime trade. Strategic chokepoints – such as the Strait of Malacca, Lombok, Bab el-Mandeb, and Hormuz – are vital to global energy flows and supply chains, making the region a decisive arena for strategic stability.<sup>3</sup>

Maritime rivalry between the United States and China is particularly pronounced. China is pursuing a multifaceted strategy that combines large-scale infrastructure investments under the Belt and Road Initiative (BRI)<sup>4</sup>, rapid naval expansion (PLAN), and assertive territorial claims. These claims in the South and East China Seas contradict international law, especially the 2016 arbitral ruling in *Philippines v. China*. Beijing is also establishing dual-use ports across the Indian Ocean, including in Djibouti, Ream, Gwadar, and Hambantota. In response, the United States has strengthened its forward presence through a network of alliances and minilateral arrangements, notably the Quad<sup>5</sup> and AUKUS<sup>6</sup>, which involves technology transfers such as nuclear-powered submarines to Australia. These initiatives aim to ensure a free and open Indo-Pacific and deter destabilising unilateral actions.

This intensifying competition directly affects European interests. Risks to freedom of navigation, rising inter-state tensions, and the transregional effects of crises – such as North Korea's support for Russia's war in Ukraine – underscore the growing entanglement between Indo-Pacific dynamics and Europe's broader strategic environment.

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<sup>3</sup> Scott, D. (2021) 'The Indo-Pacific and Geopolitical Rivalries: China, the US and Regional Dynamics', *Asia-Pacific Review*, 28(1), pp. 7–30.

<sup>4</sup> The Belt and Road Initiative is China's global infrastructure and investment strategy launched in 2013 to enhance connectivity across Asia, Africa, and Europe through transport, energy, and digital projects, including a maritime component focused on port development.

<sup>5</sup> The Quadrilateral Security Dialogue (Quad) is an informal strategic forum comprising the US, Japan, India, and Australia, focused on promoting a free, open, and inclusive Indo-Pacific through cooperation in areas such as maritime security, infrastructure, and emerging technologies.

<sup>6</sup> AUKUS is a trilateral security pact formed by Australia, the United States, and the United Kingdom, publicly announced on September 15, 2021.

## 2. A Growing Strategic Priority for the EU

For the EU, the Indo-Pacific has gained critical importance as a strategic interface for trade, investment, and connectivity. Accounting for approximately 35% of global GDP – with projections reaching 50% by 2040 – the region stands as a central engine of global economic growth. The EU is among its top trading partners, with annual bilateral trade exceeding €1.5 trillion. Given that 90% of EU external trade relies on maritime transport – much of it passing through Indo-Pacific routes – maritime security in the region is essential to Europe's economic resilience.

This interdependence creates heightened vulnerability to geopolitical disruption. Strategic flashpoints such as the Taiwan Strait and the South China Sea threaten to disrupt global shipping, supply chains, and financial flows.<sup>7</sup> A conflict in these areas would have repercussions far beyond the region, with economic consequences for the EU that could, in some scenarios, surpass those experienced during the war in Ukraine.

The Indo-Pacific is also emerging as a technological frontier, attracting increasing investment in critical sectors such as semiconductors, artificial intelligence, cybersecurity, and clean energy. Moreover, the region holds significant reserves of critical raw materials – including rare earths, lithium, and cobalt – on which European industries are increasingly dependent. This highlights the urgency of securing diversified, resilient, and sustainable supply chains. At the same time, the acceleration of offshore exploration and deep-sea mining in contested waters raises legal, environmental, and normative challenges for the EU.

Lastly, the Indo-Pacific stands at the forefront of the climate–security nexus. The region is responsible for around 45% of global greenhouse gas emissions and includes some of the world's most climate-vulnerable countries, particularly among the small island developing states (SIDS). Rising sea levels, biodiversity loss, and extreme weather events threaten not only regional habitability and sovereignty, but also broader global stability. These challenges may also affect French overseas territories in the Pacific and contribute to future migratory pressures.

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<sup>7</sup> Charlie Vest, Agatha Kratz et Reva Goujon, « The Global Economic Disruptions from a Taiwan Conflict », Rhodium Group, December 14, 2022, <https://rhg.com/research/taiwan-economic-disruptions/>.

## II. Maritime Security As A Pillar Of European Engagement In The Indo-Pacific

### 1. An Expanding Operational presence

As maritime dynamics increasingly shape regional geopolitics, Europe's engagement in Indo-Pacific maritime security reflects a clear evolution – from peripheral observer to purposeful actor. This transition is guided by a convergence of principles: respect for international law, defence of sovereignty, and a commitment to cooperative maritime governance.

Although Europe's naval footprint remains limited compared to that of the United States or China, it is becoming more targeted, visible, and politically significant. Through a combination of national deployments and EU-led initiatives, Europe is progressively asserting itself as a credible and stabilising presence committed to upholding freedom of navigation and the rules-based maritime order.

France, as the only EU Member State with sovereign territories and permanent military infrastructure in the Indo-Pacific, provides the backbone of this posture. With over 7,000 military personnel and a network of naval and air assets, France ensures a continuous presence across the Indian and Pacific Oceans. Its bases in La Réunion, Mayotte, New Caledonia, and French Polynesia offer critical logistical depth for sustained operations. Regular power-projection deployments – such as *Clemenceau*,<sup>8</sup> *Pégase*,<sup>9</sup> and participation in major multilateral exercises like RIMPAC<sup>10</sup> – illustrate France's capacity to operate in sensitive maritime zones throughout the Indo-Pacific.

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<sup>8</sup> Mission *Clémenceau* is a French naval deployment led by the aircraft carrier *Charles de Gaulle*, demonstrating power projection and interoperability across strategic theatres, including the Indo-Pacific, 'French Carrier Strike Group set sail for CLEMENCEAU 25 deployment to the Indo-Pacific', *Naval News*, 28 novembre 2024, <https://www.navalnews.com/naval-news/2024/11/french-carrier-strike-group-set-sail-for-clemenceau-25-deployment-to-the-indo-pacific/>.

<sup>9</sup> Mission *Pégase* is a French Air and Space Force deployment aimed at projecting air power, enhancing regional partnerships, and reinforcing France's strategic reach in the Indo-Pacific, French Ministry of the Armed Forces, published in July 2024, <https://www.defense.gouv.fr/operations/operations/mission-pegase>.

<sup>10</sup> RIMPAC (Rim of the Pacific Exercise) is the world's largest international maritime exercise, led by the United States and held biennially in the Pacific to promote interoperability and maritime security among allied and partner navies.

Other Member States are gradually joining this effort through selective but high-profile deployments. Germany's frigate Bayern<sup>11</sup> (2021), Italy's Cavour-led Indo-Pacific campaign<sup>12</sup> (2024), and the Netherlands' HNLMS Tromp (2023)<sup>13</sup> illustrate a growing commitment to regional presence and interoperability with Indo-Pacific partners.

European naval activity is also anchored in operational theatres of strategic importance. The European Maritime Awareness in the Strait of Hormuz (EMASOH) contributes to de-escalation and maritime situational awareness in a volatile corridor<sup>14</sup>. Operation ATALANTA<sup>15</sup>, originally focused on piracy off the Horn of Africa, has expanded to include broader monitoring of illicit maritime flows. In early 2024, the launch of the EU maritime mission ASPIDES<sup>16</sup> in the Red Sea and Gulf of Aden further underscored Europe's resolve to protect commercial shipping from regional threats, notably Houthi attacks. In 2025, the United Kingdom's deployment of HMS Prince of Wales<sup>17</sup>, supported by Norwegian and Spanish vessels, exemplifies a Europe's growing operational interoperability and collective strategic signalling in support of a rules-based maritime order.

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<sup>11</sup> Federal Ministry of Defence, Germany (2021) Frigate Bayern departs for Indo-Pacific deployment. Available at: <https://www.bundeswehr.de/en/organization/navy/news/indo-pacific-deployment-2021>.

<sup>12</sup> Naval News (2024). Italian Carrier Strike Group starts five-month deployment to the Indo-Pacific. Available at : <https://www.navalnews.com/naval-news/2024/06/italian-carrier-strike-group-starts-five-month-deployment-to-the-indo-pacific/>.

<sup>12</sup> Naval News (2024). Italian Carrier Strike Group starts five-month deployment to the Indo-Pacific. Available at : <https://www.navalnews.com/naval-news/2024/06/italian-carrier-strike-group-starts-five-month-deployment-to-the-indo-pacific/>.

<sup>13</sup> Netherlands Ministry of Defence, 'HNLMS Tromp participates in Indo-Pacific maritime security exercises', June 6, 2024, <https://www.government.nl/latest/weblogs/the-work-of-the-ministry-of-foreign-affairs/2024/navy-ship-tromp>.

<sup>14</sup> MICA Center, 'European-led Maritime Awareness in the Strait of Hormuz (EMASOH)', March 2023, <https://www.mica-center.org/en/european-led-maritime-awareness-in-the-strait-of-hormuz-emasoh/>.

<sup>15</sup> EU Council, 'Horn of Africa and Somalia: Operation ATALANTA, EUTM and EUCAP Somalia's Mandates Extended for Two Years', December 2024, <https://www.consilium.europa.eu/en/press/press-releases/2024/12/16/horn-of-africa-and-somalia-operation-atalanta-eutm-and-eucap-somalia-s-mandates-extended-for-two-years/>.

<sup>16</sup> EU Council, 'Red Sea: Council Prolongs the Mandate of Operation ASPIDES', February 2025, <https://www.consilium.europa.eu/en/press/press-releases/2025/02/14/red-sea-council-prolongs-the-mandate-of-operation-aspides/>.

<sup>17</sup> Royal Navy, 'Carrier Strike Group Sets Sail for Indo-Pacific Deployment', Naval News, April 2025, <https://www.navalnews.com/naval-news/2025/04/royal-navy-carrier-strike-group-sets-sail-for-indo-pacific-deployment/>.

Together, these developments reflect growing strategic maturity in Europe's Indo-Pacific posture. Europe is not seeking confrontation but rather shaping a distinct role – grounded in operational credibility, partnerships, and normative engagement – to enhance regional resilience and support a stable and inclusive maritime order.

## 2. Regional cooperation and projection capacity

Europe's long-term credibility in the Indo-Pacific depends on its ability to forge trusted and durable security partnerships. In a fragmented and competitive region, such partnerships provide both legitimacy and operational reach.

While the EU does not possess its own military assets, it mobilises a wide array of civilian and hybrid instruments – training, technical assistance, and funding – to support maritime security and institutional resilience. This approach privileges co-construction and responsiveness to regional priorities, notably through modular programmes such as Enhancing Security Cooperation in and with Asia (ESIWA),<sup>18</sup> Maritime Security (MASE),<sup>19</sup> and Safe Seas for Africa.<sup>20</sup>

A core element of this engagement lies in enhanced maritime domain awareness. The CRIMARIO II programme, active across the Indo-Pacific, fosters real-time coordination through the IORIS platform. This system was successfully used during the 2024 La Pérouse exercise<sup>21</sup> in the Indonesian Straits as part of the Clemenceau 25 deployment. It is now reinforced by the SHARE-IT project,<sup>22</sup> which promotes interoperability between regional maritime surveillance systems.

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<sup>18</sup> Enhancing Security Cooperation in and with Asia (ESIWA) is an EU initiative aimed at strengthening security cooperation between the EU and Asian member states, focusing on crisis management, maritime security, and regional collaboration. See: [https://www.eeas.europa.eu/eeas/esiwa-enhancing-security-cooperation-and-asia\\_en](https://www.eeas.europa.eu/eeas/esiwa-enhancing-security-cooperation-and-asia_en).

<sup>19</sup> Maritime Security (MASE) aims to foster regional maritime cooperation in East Africa and the Indian Ocean, addressing piracy and other security threats. See: <https://www.commissionoceanindien.org/portfolio-items/mase/>.

<sup>20</sup> Safe Seas for Africa is designed to promote maritime safety and security in the African context, particularly focused on cooperation and capacity-building. See: [https://www.commissionoceanindien.org/communique-safe-seas-africa-securite-maritime/and-asia\\_en](https://www.commissionoceanindien.org/communique-safe-seas-africa-securite-maritime/and-asia_en).

<sup>21</sup> French Ministry for the Armed Forces, « Clémenceau 25 – Bilan du déploiement du groupe aéronaval en océan Pacifique », <https://www.defense.gouv.fr/operations/actualites/clemenceau-25-bilan-du-deploiement-du-groupe-aeronaval-ocean-pacifique>.

<sup>22</sup> CRIMARIO II, 'SHARE.IT, exchanging information to strengthen maritime security in the Indo-Pacific and beyond', <https://www.crimario.eu/share-it/>.



While Member States continue to develop bilateral defence relations, the EU's added value lies in its ability to anchor cooperation within inclusive, multilateral frameworks. Strategic documents such as the 2021 EU Indo-Pacific Strategy, the Strategic Compass<sup>23</sup>, and the 2023 Maritime Security Strategy<sup>24</sup> provide a coherent framework for such engagement. Programmes like the Global Port Safety initiative<sup>25</sup> help strengthen port resilience, regulatory harmonisation, and risk mitigation.

In line with its normative approach, the EU promotes inclusive maritime governance rooted in international law and regional ownership. Platforms such as ASEAN<sup>26</sup>, the Indian Ocean Rim Association (IORA)<sup>27</sup>, and the Indo-Pacific Oceans Initiative (IPOI)<sup>28</sup> offer the EU a space to shape cooperative security responses to cross-cutting maritime threats – from Illegal, Unreported and Unregulated fishing (IUU) fishing<sup>29</sup> to trafficking – using integrated civil-military tools.<sup>30</sup>

By investing in long-term capacity-building, the EU brings a distinctive contribution to regional security – less confrontational, but no less strategic – focused on trust, resilience, and multilateral legitimacy.

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<sup>23</sup> EU External Action Service (EEAS), 'A Strategic Compass for Security and Defence – For a EU that protects its citizens, values and interests and contributes to international peace and security', March 2022, [https://www.eeas.europa.eu/eeas/strategic-compass-security-and-defence\\_en](https://www.eeas.europa.eu/eeas/strategic-compass-security-and-defence_en)

<sup>24</sup> EU Commission, EU Maritime Security Strategy Action Plan, 2023, <https://www.consilium.europa.eu/en/press/press-releases/2023/10/24/maritime-security-council-approves-revised-eu-strategy-and-action-plan/>.

<sup>25</sup> This Global Port Safety programme focuses on enhancing port safety and security in key regions, aiming to build resilience against maritime threats. See: <https://www.unescap.org/sites/default/d8files/event-documents/5.%20Global%20Ports%20Safety%20in%20South%20and%20South%20East%20Asia.pdf>.

<sup>26</sup> ASEAN Secretariat, ASEAN Outlook on the Indo-Pacific (AOIP), 2022, <https://asean.org>.

<sup>27</sup> The Indian Ocean Rim Association (IORA) is an intergovernmental organisation founded in 1997 to strengthen regional cooperation and sustainable development among coastal states bordering the Indian Ocean, focusing on maritime security, trade facilitation, disaster risk management, and blue economy. See: <https://www.iora.int/indian-ocean-rim-association>.

<sup>28</sup> The Indo-Pacific Oceans Initiative (IPOI) is a framework launched by India in 2019 to promote regional cooperation in the Indo-Pacific across seven pillars, including maritime security, ecological sustainability, and capacity-building, with an emphasis on an open, inclusive, and rules-based maritime order. See: <https://www.uow.edu.au/ancors/our-research/indo-pacific-oceans-initiative-ipoi-project/>.

<sup>29</sup> Illegal, Unreported, and Unregulated (IUU) fishing, referring to fishing activities that break laws, are not reported to authorities, or occur outside proper regulations. It threatens marine ecosystems, undermines sustainable fisheries, and is often linked to broader criminal activities.

<sup>30</sup> EU External Action Service, EU Indo-Pacific Ministerial Forum – Co-Chairs' Press Release, February 2023, [https://www.eeas.europa.eu/eeas/eu-indo-pacific-ministerial-forum-co-chairs%E2%80%99-press-release\\_en\\_and-asia\\_en](https://www.eeas.europa.eu/eeas/eu-indo-pacific-ministerial-forum-co-chairs%E2%80%99-press-release_en_and-asia_en).

### 3. The French Overseas Territories as a Strategic Lever for EU

While the EU lacks its own military infrastructure in the Indo-Pacific, it indirectly benefits from a unique geographic advantage: the French overseas territories. Located in both the Indian and Pacific Oceans, territories such as New Caledonia, French Polynesia, La Réunion, and Mayotte host permanent French military installations that support air and naval operations. Though strictly national assets, they provide a platform for sustained European presence and influence.

Operationally, this overseas network offers critical logistical and surveillance capabilities. It enables rapid deployment and regional situational awareness – key advantages in a theatre characterised by dispersion, long distances, and a fast-paced strategic tempo. Yet, these capabilities remain underutilised in a collective European context.

Beyond the military dimension, the French overseas territories also serve as diplomatic and cultural bridges with the broader region. Their deep-rooted historical, linguistic, and cultural ties with Pacific Island states facilitate trust-based dialogue and cooperation. The observer status of French Polynesia and New Caledonia in the Pacific Islands Forum (PIF)<sup>31</sup> exemplifies this connection, offering indirect EU visibility in regional political arenas typically closed to external actors. This presence helps support initiatives aligned with regional priorities – such as climate resilience, marine resource management, education, and sustainable development.

Through instruments such as the French Development Agency (AFD)<sup>32</sup> and regional cooperation mechanisms, France contributes to projecting EU-aligned interests in areas including climate resilience, blue economy governance, and disaster preparedness. These tools serve as strategic entry points for a broader EU engagement grounded in proximity, long-term presence, and regional legitimacy.

<sup>31</sup> Pacific Islands Forum Secretariat, 'Membership and Partners', <https://www.forumsec.org>.

<sup>32</sup> French Development Agency (AFD), <https://www.afd.fr>.

In an Indo-Pacific increasingly shaped by great-power rivalry and contested norms, this model of territorially anchored, partnership-based presence is a strategic asset. It provides France – and potentially the EU – with a rare combination of permanence, trust, and relevance. Fully unlocking this potential will require a more structured integration of national assets into a cohesive and long-term European strategy.

### **III. Towards A Sustainable And Inclusive Maritime Security Architecture**

#### **1. A Distinctive European Offer in a Competitive Maritime Arena**

In a region marked by intensifying great-power rivalries, the EU promotes a model of maritime engagement distinct from both China's infrastructure-led influence and the United States' alliance-based security posture. The EU advocates a cooperative and normative approach anchored in trust-building, inclusive governance, and long-term resilience. Through initiatives such as the Global Gateway,<sup>33</sup> the EU supports regional connectivity in maritime, digital, and energy sectors – responding to local priorities without imposing coercive conditionalities or strategic alignment. This engagement is grounded in sustained investment in regulatory and institutional capacities, particularly in states facing structural vulnerabilities.

Under the Safe Seas for Africa programme, the EU has trained coast guard officers and maritime magistrates in Djibouti and the Seychelles, helping to professionalise maritime governance. The ESIWA initiative has assisted Indonesian and Vietnamese officials through workshops on law enforcement and regional coordination. In the Indian Ocean, CRIMARIO II and MASE have supported the creation of inter-agency maritime coordination centres and early-warning mechanisms. In countries such as Timor-Leste and Vanuatu, EU-funded technical assistance has enabled the drafting of national maritime codes and coastal zoning frameworks, reflecting a transfer of legal and environmental expertise adapted to local contexts.

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<sup>33</sup> EU External Action Service, 'Global Gateway', [https://international-partnerships.ec.europa.eu/policies/global-gateway\\_en](https://international-partnerships.ec.europa.eu/policies/global-gateway_en).

What emerges is more than a toolbox of cooperation instruments – it is a strategic proposition. Europe fosters convergence around international law, sustainable development, and the shared management of maritime commons. This approach resonates with many ASEAN and Pacific Island nations that seek to preserve strategic autonomy while building trusted, multilateral partnerships.

However, the credibility of this model depends on its ability to combine normative leadership with operational consistency. Naval deployments, joint exercises, and humanitarian disaster response missions are essential complements to civilian engagement. They demonstrate Europe's readiness to act across the full spectrum of maritime security – bridging regulation and real-world presence.

In a maritime Indo-Pacific increasingly shaped by dual-use coercion, environmental degradation, and strategic bifurcation, the EU's emphasis on civil-military synergies, inclusive partnerships, and multilateral legitimacy offers a stabilising and distinctive alternative. It reinforces Europe's image not only as a donor or facilitator, but as a capable and enduring maritime actor.

## 2. From Fragmentation to Convergence

Despite growing visibility and an expanding toolkit, Europe's maritime engagement in the Indo-Pacific remains constrained by structural fragmentation. Multiple national initiatives coexist with EU-led frameworks, but rarely converge into a coherent and sustained presence. As a result, Europe's message of normative partnership risks dilution – particularly in a region that values consistency, responsiveness, and long-term commitment.

Turning a patchwork of complementary actions into a cohesive strategy requires more than additional instruments – it calls for stronger political alignment, shared operational mechanisms, and sustained anchoring in regional partnerships.

Three interdependent priorities emerge:

- **Operational convergence and institutional coordination:** While the *Strategic Compass* (2022) and the *EU Maritime Security Strategy* (2023) offer a solid policy baseline, their operational implementation remains uneven. Mechanisms such as *IORIS* and the *SHARE-IT* project show the potential for shared maritime situational awareness but must be embedded in more structured joint planning cells and real-time coordination platforms between EU missions and national deployments.

- **Pooling assets and logistics:** Crisis-driven operations such as *EMASOH* and *ASPIDES* have shown that European navies can operate collectively in high-threat environments. This model could be extended to preventive deployments via shared patrols, pooled logistics hubs, and cross-flagged crew arrangements. Such convergence would strengthen deterrence and maximise impact while avoiding duplication of national efforts.
- **Anchoring presence in regional partnerships and geography:** The EU's credibility increasingly depends on proximity-based cooperation with key regional organisations – such as ASEAN, the Pacific Islands Forum (PIF), and the Indian Ocean Rim Association (IORA). In this context, France's overseas territories could serve as forward nodes for European initiatives in resilience, training, and maritime governance. Their structured inclusion in EU coordination efforts would enhance both political visibility and logistical continuity.

Ultimately, consolidating a European maritime partnership model does not require reinvention – but integration. By aligning existing strategies with common operational frameworks and embedding them in trusted regional partnerships, Europe can evolve from episodic action to a consistent, co-owned presence across the Indo-Pacific.

### **3. Consolidating Sustainability, Resilience, and Digital Security in Maritime Strategy**

Europe's maritime engagement has long transcended traditional defence, reflecting a broader conception of security that integrates environmental, human, and digital dimensions. These priorities are not peripheral – they are central to the EU's credibility as a comprehensive, trusted, and future-oriented maritime partner.

- **Blue economy governance:** The EU promotes sustainable resource management through support to marine spatial planning, fisheries governance, and reef conservation. Initiatives such as *Ecofish*<sup>34</sup> in the Indian Ocean and PEUMP<sup>35</sup> (Pacific-EU Marine Partnership) illustrate how EU funding – particularly through the European Development Fund – helps local authorities implement science-based and inclusive maritime policies.
- **Climate resilience and disaster preparedness:** Given the Indo-Pacific's acute exposure to climate-related risks, EU action focuses on adaptation finance, early warning systems, and post-disaster recovery. *The GCCA+ (Global Climate Change Alliance Plus)*<sup>36</sup> supports national resilience strategies, while EU-France projects have enabled coastal protection in Vanuatu and mangrove reforestation in Madagascar. French-led HADR missions also benefit from coordination with the *EU Civil Protection Mechanism*, reinforcing Europe's collective response capacity.
- **Cybersecurity and Digital Infrastructure Protection:** As maritime domains become increasingly digitalised, the EU is scaling up efforts to protect critical systems. *SHARE-IT*, developed under *CRIMARIO II*, strengthens the interoperability of regional maritime surveillance platforms. In parallel, the EU cooperates with the *ASEAN-Singapore Cybersecurity Centre of Excellence* and the *CyberNet* programme<sup>37</sup> to build digital resilience in port security and maritime infrastructure across coastal and island states.

Together, these actions form the foundation of a human-centred, resilience-oriented maritime strategy. They enable the EU to address non-traditional threats – such as environmental degradation, IUU fishing, and infrastructure vulnerabilities – while reinforcing regional ownership and sustainable stability.

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<sup>34</sup> EU Commission, 'ECOFISH Programme – Eastern Africa, Southern Africa and the Indian Ocean', <https://ecofish-programme.org/>.

<sup>35</sup> EU External Action Service, 'Pacific-European Union Marine Partnership (PEUMP)', [https://www.eeas.europa.eu/eeas/pacific-eu-marine-partnership\\_und](https://www.eeas.europa.eu/eeas/pacific-eu-marine-partnership_und).

<sup>36</sup> EU Commission, 'Global Climate Change Alliance Plus' (GCCA+), [https://capacity4dev.europa.eu/groups/gcca-community\\_en](https://capacity4dev.europa.eu/groups/gcca-community_en).

<sup>37</sup> EU CyberNet. See : <https://www.eucybernet.eu/about-project/>.

## V. Conclusion

The Indo-Pacific is no longer a peripheral geography for Europe. It has become a region of growing relevance for the EU's global influence, economic resilience, and normative ambitions. In recent years, the EU and its Member States have gradually developed a multidimensional presence across the region. While often discreet and still lacking full visibility, this engagement lays the groundwork for a more structured and strategic European role. This growing involvement nonetheless faces structural limitations. In a security environment dominated by the war in Ukraine and rising tensions in Europe's eastern neighbourhood, the Indo-Pacific must contend for attention and resources. For many Member States, geographical proximity continues to shape political discourse and defence planning.

In this context, the challenge is not simply to scale up engagement in the Indo-Pacific, but to sustain it, clarify its added value, and better connect it to Europe's core security priorities. Achieving this requires a clear-eyed assessment of existing capabilities, a shared sense of purpose among Member States, and a more proactive communication effort – both within Europe and towards Indo-Pacific partners. Europe may not become a military power in the region – but it can be a security actor in its own right. Through its regulatory expertise, commitment to multilateralism, and long-term investment in resilience, the EU is well-positioned to contribute to regional stability and cooperative maritime governance. By building on its existing presence and leveraging the complementary assets of its Member States – particularly France's overseas footprint – it can offer credible support to a rules-based maritime order.

Above all, Europe's future role in the Indo-Pacific will not be defined by rhetoric, but by its ability to deliver – modestly but consistently – in support of stability, partnership, and shared prosperity.

## About the Author

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His operational experience covers all the seas of the globe, and more recently the cadets training and recruitment within the French Navy and representative of the Admiral in charge of operations in the Asia-Pacific zone (ALPACI) in Southeast Asia, allows it to contribute to studies relating to the Indo-Pacific region and more broadly to French maritime, security, capacity and strategic issues.



# THE EUROPEAN UNION'S JOURNEY FROM CIVILIAN POWER TO SECURITY PROVIDER: A VIEW FROM SOUTHEAST ASIA

*Andrea Passeri*

## 1. Introduction: Role Conception Theory and the EU's Strategic Evolution

This paper explores the European Union's (EU) evolving global role, particularly in the Indo-Pacific, where the bloc is seeking to reposition itself from a traditional 'civilian power' to a nascent security provider. While the EU has long relied on non-coercive instruments centred on trade, diplomacy, and development aid to assert international influence, recent global disruptions and shifting strategic landscapes have prompted a reconsideration of its external posture. To better understand this shift, the investigation draws on role conception theory, an analytical framework that highlights the dynamic interplay between how political actors perceive their own roles, how others perceive them, and how these perceptions are reflected in actual policy choices.<sup>1</sup> This approach is particularly well-suited to capturing the fluid and contested nature of international roles, as it underscores that such roles are not fixed or self-ascribed, but are constantly shaped and reshaped through interaction with domestic constituencies and external partners. By highlighting how identity and practice shape each other, role conception theory offers valuable insights into how and why the EU's international posture is changing, and the extent to which its evolving ambitions are recognised, or resisted, by actors in Southeast Asia.

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<sup>1</sup> Aggestam, L. 2006. "Role theory and European foreign policy. A framework of analysis", in Elgström, O. and Smith, M. (Eds.), *The European Union's Roles in International Politics. Concepts and Analysis*, Routledge, pp. 12-14.

The EU's civilian identity is historically rooted in its foundational experience of economic and legal integration, privileging cooperative norms and multilateralism over military might.<sup>2</sup> This orientation was reinforced through instruments such as trade agreements with human rights clauses, electoral observation missions, and crisis response mechanisms under the Common Security and Defence Policy (CSDP). However, the EU's 'civilian posture' also reflected structural limitations in terms of hard-power capabilities, including the absence of a unified army and recurrent divisions among Member States regarding defence integration. Since becoming an ASEAN dialogue partner in 1977, the EU cultivated a civilian identity that resonated remarkably well in Southeast Asia throughout the 1990s and early 2000s, positioning itself as a normative partner through active engagement in the ASEAN Regional Forum (ARF) and initiatives such as the Regional EU-ASEAN Dialogue Instrument (READI).<sup>3</sup> Nevertheless, in recent years new pressures began to reshape this posture. Geopolitical shocks, including Russia's annexation of Crimea and subsequent full-scale invasion of Ukraine in 2022, Brexit, U.S. retrenchment under Trump's first term, and China's growing assertiveness, fundamentally destabilised the liberal international order on which the EU had built its strategy.

Hence, as global turbulences intensified, the EU found itself compelled to reassess its global posture. In this context, the concept of 'strategic autonomy' gained renewed prominence within European policy circles, particularly from the mid-2010s onward.<sup>4</sup> Championed most prominently by France, strategic autonomy called for the EU to reduce its dependence on external actors, especially the United States, in matters of defence, security, and critical infrastructure.<sup>5</sup> This discourse was increasingly institutionalised through mechanisms such as the Permanent Structured Cooperation (PESCO), launched in 2017 to facilitate joint EU defence initiatives

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<sup>2</sup> Orbie, J. 2008. "A Civilian Power in the World? Instruments and Objectives in European Union External Policies", in Orbie, J. (Ed.), *Europe's Global Role. External Policies of the European Union*, Routledge, 2008, pp. 12–49.

<sup>3</sup> Yeo, L. H. 2009. "Political Cooperation Between the EU and ASEAN: Searching for a Long-Term Agenda and Joint Projects". In Welfens, P.J.J. et al. (Eds.) *EU-ASEAN. Facing Economic Globalisation*, Springer, pp. 47–49.

<sup>4</sup> Lippert, B., Ondarza, N. V., and Perthes, V. (Eds.). 2019. *European Strategic Autonomy: Actors, Issues, Conflicts of Interests*, SWP Research Paper 4: 9–14.

<sup>5</sup> Martin, G. and Sinkkonen, V. 2022. "Past as Prologue? The United States and European Strategic Autonomy in the Biden Era." *European Foreign Affairs Review* 27: 99–120.

among willing Member States. Concurrently, in Southeast Asia, a deteriorating regional security landscape led many ASEAN member states to seek a broader network of strategic partners. While the United States and China remained central, there was growing interest in engaging other actors, including the EU, to hedge against regional instability and avoid overdependence on any single power. This shifting environment created openings for a recalibrated European presence, one that went beyond normative engagement and development aid to include targeted security cooperation, capacity-building, and maritime domain awareness initiatives.

Against this backdrop, role conception theory provides critical insights into this transformation. Rather than a binary shift from civilian to military actor, the EU's evolution reflects a layered redefinition of its global identity, shaped not only by external demand, but also by internal debates over the scope of its responsibilities, the sources of its legitimacy, and the scale of its geopolitical priorities. As a result, the Indo-Pacific has rapidly asserted itself as a key testing ground for the EU's emerging security role and renewed power-projection ambitions. The 2021 EU Strategy for Cooperation in the Indo-Pacific (EUSIP), alongside a growing number of bilateral security dialogues with ASEAN member states, underscores the Union's strategic reorientation towards the region. This collective effort, moreover, has been reinforced by a wave of complementary national strategies and white papers from key EU member states, most notably France's Indo-Pacific Strategy (2018, updated in 2021), Germany's Indo-Pacific Strategy (2020), and the Netherlands' Indo-Pacific Guidelines (2020), each articulating a distinct but convergent vision for deeper regional engagement in maritime security, economic resilience, and rules-based order.<sup>6</sup> Taken together, these documents reflect a more coordinated, though still uneven, European approach to the Indo-Pacific.

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<sup>6</sup>Wacker, G. 2021. "The Indo-Pacific Concepts of France, Germany and the Netherlands in Comparison: Implications and Challenges for the EU." Policy Briefs, EUI Global Governance Programme, 2021/19.

Yet, the enduring tension between the EU's aspirations and actual capabilities, and between unity and fragmentation, continues to shape its agenda and legacy in the region, revealing the persistent challenges of forging a coherent security role across a diverse and multilevel governance structure. These complexities not only underscore the importance of analysing the EU's external engagement through a nuanced theoretical lens, but also inform the central questions that guide this paper's inquiry. Specifically, the study explores how role conception theory can account for the EU's shift toward security engagement in the Indo-Pacific, what internal and external factors have contributed to this transition, and how Southeast Asian states have perceived and responded to the EU's evolving posture. In doing so, the paper aims to contribute to a deeper understanding of the EU's emerging role in a region marked by strategic fluidity and contested order, while also demonstrating the value of role-based approaches in capturing the interplay between identity, agency, and structural constraint in global politics.

## 2. Europe's Past as Civilian Power: Norms, Identity, and Constraints

The notion of Europe as a 'civilian power' – first articulated by François Duchêne in the early 1970s – has long served as a conceptual anchor for understanding the EU's distinctive global posture.<sup>7</sup> According to Duchêne, Europe's uniqueness lay in its reliance on economic leverage, diplomacy, legalism, and multilateralism to shape international outcomes rather than on the coercive military instruments usually employed by other great powers. This framing subsequently gained institutional traction and intellectual elaboration, most notably through Ian Manners' influential concept of 'normative power', which contended that the EU's identity as an exporter of liberal-democratic values was not merely descriptive, but central to its legitimacy and effectiveness as a foreign policy actor.<sup>8</sup> Institutionally, this civilian identity was embedded in a series of strategic and legal frameworks. The 2003 European Security Strategy (ESS) emphasised conflict prevention, multilateralism, and effective global governance, while the 2009 Lisbon Treaty codified the EU's commitment to democracy, rule of law, and human rights as guiding principles of its external action.

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<sup>7</sup> Orbie, J. 2006. "Civilian Power Europe: Review of the Original and Current Debates." *Cooperation and Conflict* 41: 123–128.

<sup>8</sup> Manners, I. 2002. "Normative Power Europe: A Contradiction in Terms?". *Journal of Common Market Studies* 40: 235–258

Subsequently, these priorities were further operationalised through trade agreements incorporating conditionality clauses, humanitarian and development aid aligned with governance objectives, and a range of CSDP missions focused primarily on civil and post-conflict stabilisation roles. Even where military resources were involved, such as in the European Union Force Bosnia and Herzegovina (EUFOR) operations, they were limited in scale and scope, reflecting a broader reluctance to engage in power projection.<sup>9</sup> During this stage, several structural factors reinforced the EU's civilian approach. First, the fact that it lacked a supranational military structure, and decision-making on defence remained firmly in the hands of individual member states. Second, its strategic culture appeared highly fragmented, with significant divergence between "Atlanticists" and autonomist preferences.<sup>10</sup> Third, the EU's institutional inertia was further buttressed by the broader geopolitical environment of the post-Cold War period, as U.S. security guarantees under NATO allowed the Union to prioritise soft security functions while relying on Washington for hard deterrence.

In this setting, the EU's civilian approach was not only coherent with its internal architecture, but also well-suited to a relatively benign international order. In Southeast Asia, such posture found a particularly fertile ground, as its emphasis on dialogue and cooperation resonated with ASEAN's own principles of non-interference, consensus-building, and regional autonomy. Through mechanisms such as the ARF and READI, the EU promoted inter-regional linkages in areas including education, environmental governance, and public health. Yet, this engagement also underscored the EU's marginal role in regional security affairs, as it largely avoided naval deployments, steered clear of involvement in sensitive territorial disputes such as those in the South China Sea, and refrained from establishing a more robust military presence in the Indo-Pacific. Nevertheless, Europe's civilian power identity held strategic relevance, as it provided ASEAN states with normative validation,

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<sup>9</sup> EUFOR stands for "European Union Force". It refers to EU-led military operations under the EU's CSDP, typically deployed in crisis management or peacekeeping missions outside the EU. Relevant examples of such operations are "EUFOR Althea", a long-running mission in Bosnia and Herzegovina since 2004, and "EUFOR RCA", a mission in the Central African Republic launched in 2014 to help stabilize the country during a civil conflict. For a detailed analysis, see: Ivana Boštjančič, I., Muherina, M. and Pejić N. (2016). "Analyzing the Effectiveness of EUFOR Althea Operation in Bosnia and Herzegovina". *Journal on European perspectives of the Western Balkans* 8:2, 87–116.

<sup>10</sup> Banka, A. 2023. "Super Atlanticist in the EU? Vilnius Between Washington and Brussels". *European Foreign Affairs Review* 28:2, 165–184.

institutional capacity-building, and alternative channels for cooperation that did not impinge on regional sovereignty. In doing so, the EU functioned as a ‘quiet balancer,’ offering public goods and diplomatic support while avoiding the entanglements of traditional military alliances.<sup>11</sup>

However, by the late 2010s, this model began to show its limits. New security threats, such as cyberattacks, maritime militarisation, terrorism, and disinformation campaigns, increasingly challenged the adequacy of civilian tools alone. Simultaneously, systemic transformations, starting from the acceleration of U.S.–China strategic rivalry, compelled the EU to reassess its reliance on soft power. The EU Global Strategy of 2016 marked a pivotal moment in this reappraisal.<sup>12</sup> While reaffirming a commitment to multilateralism and development, it also called for enhanced resilience, the pursuit of strategic autonomy, and the development of credible defence capabilities, thus nudging the EU towards a more hybrid identity. The internal discourse around strategic autonomy, championed especially by France and supported by initiatives such as the European Defence Fund (EDF), began to gain traction across the continent.<sup>13</sup> These mechanisms sought to rationalise defence spending, promote joint capability development, and create the institutional platforms for a more assertive EU role in security affairs. Though still limited in ambition and implementation, they signalled a growing consensus that the EU needed to enhance its strategic bandwidth beyond purely civilian means.

In Southeast Asia, this shift was met with both curiosity and caution.<sup>14</sup> While ASEAN states appreciated the EU’s continued support for rule-based order and capacity-building, they also began to look for more tangible commitments in maritime security, cyber governance, and crisis response. The limits of the EU’s

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<sup>11</sup> Khandekar, G. 2014. “Mapping EU-ASEAN Relations”. Fundación para las Relaciones Internacionales y el Diálogo Exterior (FRIDE): 4–20.

<sup>12</sup> Tocci, N. 2016. “The Making of the EU Global Strategy”. *Contemporary Security Policy* 37:3, 461–472.

<sup>13</sup> Besch, S. 2025. “EU Defence Industrial Policy In a New Era”. Heinrich-Böll-Stiftung European Union, 10–12.

<sup>14</sup> Tan, E. and J. Lin. 2024. “Engaging Southeast Asia: The EU’s role as a Resilient and Reliable Middle Power?” *ISEAS Perspective* 41, [https://www.iseas.edu.sg/wp-content/uploads/2024/04/ISEAS\\_Perspective\\_2024\\_41.pdf](https://www.iseas.edu.sg/wp-content/uploads/2024/04/ISEAS_Perspective_2024_41.pdf).

civilian role became apparent in situations such as the 2017 Rohingya crisis, or rising tensions in the South China Sea, where ASEAN states often turned to more capable security actors for assistance or deterrence.<sup>15</sup> As such, the EU's civilian power identity has long shaped its engagement with Southeast Asia, offering normative credibility and developmental partnership. However, changing strategic conditions and the emergence of new security imperatives have exposed the limits of this model. The EU's subsequent turn towards strategic autonomy and defence integration marks an important inflection point, signalling the gradual construction of a more complex and layered international role, aimed at integrating, rather than displacing, its foundational civilian ethos. The next section explores how this evolving posture has materialised in the Indo-Pacific, and how Southeast Asia has responded to it.

### **3. From Norms to Naval Presence: The EU's Strategic Turn in Southeast Asia**

The culmination of the EU's shift from normative actor to emerging security provider in Southeast Asia is arguably embodied by the inking of the 2021 EUSIP, a landmark document marking Europe's unprecedented strategic ambition to play a more active role in regional security. While still far from being a conventional military power, in recent years the EU has begun to expand its security footprint through strategic partnerships, naval deployments, and capacity-building efforts that exceed the normative and economic instruments traditionally associated with its foreign policy toolbox. This section examines the internal drivers and mechanisms that have enabled this shift, before turning to the EU's evolving engagements in Southeast Asia and how they are perceived within the region. In doing so, the investigation highlights the complex interplay between the EU's identity aspirations, external expectations, and structural constraints, which are all central elements in role conception theory.

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<sup>15</sup> Poletti, A. and Sicurelli, D. 2022. "The Political Economy of the EU Approach to the Rohingya Crisis in Myanmar". *Politics and Governance* 10:1, 47–57.

Internally, the EU's security pivot stems in part from intensifying debates over strategic autonomy. In this respect, the narrative of Europe as a 'geopolitical actor' gained momentum during the presidency of Emmanuel Macron, beginning in 2017, and the tenure of Ursula von der Leyen as President of the European Commission from 2019 onward.<sup>16</sup> Both leaders have championed the development of more integrated defence capabilities, and the pursuit of autonomous policy planning, positioning the EU as a more assertive and strategically coherent global player. Mechanisms such as the European Peace Facility (EPF), launched in 2021, have enabled the EU to fund military support for partner countries, marking a significant departure from the civilian boundaries of the CSDP. Likewise, the Coordinated Maritime Presence (CMP) concept, piloted in the Gulf of Guinea and expanded to the Indo-Pacific, provides a flexible framework for European naval cooperation without requiring a standing EU navy. All these trends have been further accelerated by the outbreak of Russian war against Ukraine in 2022, which served as a strategic shock and wakeup call that underscored Europe's vulnerability and the urgency of enhancing its defence posture. In response, the EU has launched several high-profile initiatives, including the Strategic Compass for Security and Defence, which outlines a shared threat assessment and concrete actions to strengthen operational readiness, crisis response, and security partnerships.<sup>17</sup>

These institutional developments reflect deeper shifts in the EU's role conception. No longer content with being merely a normative exemplar, Europe has begun to assert itself as a more versatile actor capable of blending hard- and soft-power. As said, this identity metamorphosis has been further mirrored in the Indo-Pacific. The 2021 Indo-Pacific Strategy situates the region as central to Europe's strategic interests, citing challenges such as coercive maritime behaviour, cyber threats, and strategic competition. It articulates a vision of 'inclusive and rules-based cooperation,' but one underpinned by greater EU presence in regional security dialogues and

<sup>16</sup> Franke, U. and Varma, T. 2019. "Independence Play: Europe's Pursuit of Strategic Autonomy". European Council on Foreign Relations (ECFR), pp. 4–7.

<sup>17</sup> Blockmans, S., Macchiarini Crosson, D., and Z. Paikin. 2022. "The EU's Strategic Compass. A Guide to Reverse Strategic Shrinkage?" CEPS Policy Insights 14, [https://cdn.ceps.eu/wp-content/uploads/2022/03/CEPS-PI2022-14\\_EU-Strategic-Compass.pdf](https://cdn.ceps.eu/wp-content/uploads/2022/03/CEPS-PI2022-14_EU-Strategic-Compass.pdf)



operational initiatives.<sup>18</sup> Among the clearest manifestations of this commitment has been the increase in naval deployments by EU Member States under an EU flag or through ad hoc coordination. France and Germany have led the way with frigate missions to the South China Sea and joint exercises with regional partners, while the Netherlands and Italy have also stepped up their engagement. In particular, Italy's recent multiple naval deployments to the Indo-Pacific – including carrier strike group operations and joint exercises with countries such as Japan, the Philippines, and Australia – have been pursued under the banner of Europe's CMP.<sup>19</sup>

On the diplomatic front, the EU's relation with ASEAN, elevated to a full strategic partnership in 2020, has taken on a security dimension. The two sides have held regular high-level dialogues on maritime security, cyber cooperation, and crisis response since 2017. Similarly, capacity-building initiatives, including support for coast guard modernisation, information-sharing, and resilience programming, have been quietly expanding. Furthermore, the EU has also increased its visibility in ASEAN-led mechanisms such as the ARF and the ASEAN Defence Ministers' Meeting-Plus (ADMM-Plus), though it remains a dialogue partner rather than a core security actor. Despite these efforts, ASEAN perceptions of the EU's evolving role remain ambivalent. On one hand, Southeast Asian policymakers generally welcome the EU's commitment to a rules-based order, multilateral dialogue, and regional autonomy, which are principles consistent with ASEAN's diplomatic playbook. In such perspective, the EU's provision of public goods, including pandemic recovery aid, green transition support, and human security programming, reinforces its soft power credentials.<sup>20</sup> In maritime security, especially, Europe's enhanced presence is viewed as a potential stabilising force, offering an alternative to the U.S.–China polarity and complementing Japan, India, and Australia's roles in the region.<sup>21</sup>

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<sup>18</sup> Pugliese, G. 2023. "The European Union's Security Intervention in the Indo-Pacific: Between Multilateralism and Mercantile Interests". *Journal of Intervention and Statebuilding* 17:1, 76-98.

<sup>19</sup> Casarini, N. 2023. "Italy's Pivot to the Indo-Pacific. Towards a Value-driven Foreign Policy?" IAI Commentaries 23, <https://www.iai.it/sites/default/files/iaicom2324.pdf>

<sup>20</sup> Chen, X. and Fanoulis, E. 2024. "EU Digital Public Diplomacy in Southeast Asia during the COVID19 Pandemic". *European Politics and Society*: 1-23.

<sup>21</sup> Hutt, D. and D. Janjevic. 2025). "EU's Reputation Grows among Southeast Asian Elites". *Deutsche Welle*, April 12. Accessed May 2, 2025. <https://www.dw.com/en/eus-reputation-grows-among-southeast-asian-elites/a-72220096>

On the other hand, questions persist regarding the EU's strategic reliability, military capacity, and internal cohesion.<sup>22</sup> Unlike the United States or China, the EU lacks a centralised command structure or standing forces, limiting its capacity for rapid or decisive intervention. Its security engagements remain fragmented, often driven by a few proactive member states rather than a coherent EU-wide strategy. This patchiness fuels scepticism in ASEAN capitals about the EU's power projection capabilities and ability to deliver on security commitments. Furthermore, ASEAN states are wary of being drawn into great-power rivalries and prefer security partners who support strategic ambiguity and respect regional centrality. Accordingly, the EU's rhetorical alignment with the United States and its criticism of Chinese behaviour risks being interpreted as taking sides. To be perceived as a genuine security provider, the EU must therefore walk a fine line, offering tangible support without undermining ASEAN's neutrality. Nevertheless, there are clear signs of converging interests. The EU's investment in maritime domain awareness (MDA), for example, aligns with ASEAN's emphasis on capacity-building in such area.<sup>23</sup> Likewise, joint efforts on non-traditional security threats resonate with regional priorities.

Against this backdrop, role conception theory helps illuminate the significance of such developments. The EU's evolving posture in Southeast Asia is not merely reactive, but performative. Through symbolic acts, such as port calls and naval visits, the discursive framing manifested in strategic documents, and growing institutional participation in regional fora, the EU is actively constructing a new role for itself in this part of the globe. Europe's new posture, most notably, seeks to reconcile its normative past with a more strategic future, while inviting ASEAN states to recalibrate their expectations of Europe, according to a feedback loop between self-perceptions and external recognition that is central to role theory. Ultimately, the EU's ability to consolidate its role as a security provider in Southeast Asia will hinge on three factors. First, its internal coherence, namely the capacity to implement consistent policy across member states and institutions. Second, its external credibility, which will rest on demonstrating sustained commitment and capacity.

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<sup>22</sup> Tan, E. and J. Lin. 2024. "Engaging Southeast Asia: The EU's role as a Resilient and Reliable Middle Power?".

<sup>23</sup> Pejsova, E. 2019. "The EU as a Maritime Security Provider". ISS Brief 13, <https://www.iss.europa.eu/publications/briefs/eu-maritime-security-provider>

Finally, the extent to which the EU and ASEAN can build genuine complementarity in their security initiatives, ensuring that European engagement reinforces rather than disrupts regional priorities and norms.

### **Conclusion: Reflecting on Europe's Evolving Role in Southeast Asia**

The EU's ongoing transformation from a predominantly civilian power to an emerging security provider in Southeast Asia marks a significant evolution in its global role and strategic identity. This paper has applied role conception theory to examine the dynamics of such a meaningful transition, arguing that rather than representing an abrupt departure from its normative roots, this shift reflects a gradual layering of security commitments onto the EU's traditional civilian identity. Historically, the EU has prioritised diplomacy, development, and support for multilateralism, an approach that resonated strongly in Southeast Asia and aligned well with ASEAN's consensus-based, non-interventionist foreign policy posture. However, growing geopolitical tensions, intensified great-power rivalry, and challenges to the rules-based international order have revealed the limitations of relying solely on normative instruments. In response, the EU has begun recalibrating its posture, most notably through the 2021 Indo-Pacific Strategy and a series of security dialogues with ASEAN. As a result, new instruments and mechanisms, such as EPF and CMP, have expanded the EU's capacity to offer tangible security contributions, from naval cooperation to capacity-building.

This shift, however, is not without complications. Internally, the EU must manage divisions among its Member States regarding strategic autonomy and the allocation of defence resources. In parallel, this security metamorphosis must be communicated with nuance to regional audiences, to avoid provoking tensions or undermining ASEAN's centrality and preference for neutrality and non-alignment. From a Southeast Asian perspective, the EU's growing engagement is welcomed in principle, especially in areas like maritime security and cybersecurity, yet questions remain about the EU's operational credibility and long-term commitment. In such

regard, role conception theory helps make sense of these dynamics, by indicating that the European metamorphosis is neither cosmetic nor temporary, but rather a deliberate effort to construct a new role for itself through symbolic acts, strategic narratives, and institutional engagement. Looking ahead, the EU's effectiveness as a security provider in Southeast Asia will depend on mutual recognition by ASEAN states of the EU's legitimacy as a trustworthy security partner, capable of supporting the region in managing the challenges of an increasingly complex and competitive geopolitical landscape.

Ultimately, Europe's journey towards a more pronounced security identity remains very much a work in progress. Rather than unfolding through bold or transformative leaps, this shift has been defined by cautious and incremental steps, reflecting both the EU's internal constraints and the sensitivity of the regional security environment. While still nascent, this evolution signals a significant recalibration of Europe's global role, particularly as the Indo-Pacific emerges as a central theatre in 21st century geopolitics. Hence, what lies ahead is not simply a test of Europe's military or institutional capabilities, but a broader challenge of strategic maturity, one that requires combining responsiveness with restraint. If the EU can navigate this delicate balance, its emerging presence in Southeast Asia may serve not only as a regional milestone, but as a model for principled security engagement in an increasingly multipolar world.

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## EUROPE AS A SECURITY PLAYER IN THE INDO-PACIFIC: LESSONS FROM EU NAVAL OPERATIONS IN THE RED SEA

*Jean-Loup Samaan*

On 19 November 2023, the Houthis — the Yemeni insurgent group on one side of the country's civil war — began a campaign of missile and drone attacks against civilian ships crossing the Red Sea. Their stated motive was to express solidarity with Palestinians in the wake of the Gaza war by targeting Israeli vessels, or those headed to or from the country. In reality, many of the ships that were attacked have been neither Israeli vessels, nor were those headed to or from the country. For instance, the first vessel targeted, the *Galaxy Leader*, was Bahamas-flagged, British-owned, and travelled from Turkey to India.

The Houthi campaign directly impacted global supply chains: approximately 11% of world trade flows across the Red Sea.<sup>1</sup> In 2022, 21,344 ships (averaging 59 a day) traversed the route. As attacks mounted, shippers rerouted their vessels via the Cape of Good Hope, a diversion that added between 3,000 and 6,000 nautical miles and two weeks to each trip. Soon, observers estimated that freight container volume crossing the Red Sea fell by 78% over the previous year,<sup>2</sup> contributing to shipping and production delays, and driving up costs for numerous industries, from carmakers to clothing retailers. The fall of ship traffic through the Suez Canal affects Egypt's economy particularly: canal tolls, estimated at USD\$9.4 billion a year ago, are one of the three most important sources of foreign revenue for the government.<sup>3</sup> For Asian countries, the Red Sea also represents a critical maritime passage. For instance, it accounts for 50% of India's imports, and 60% of its exports (worth roughly US\$113

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<sup>1</sup> Samuel Wendel, "How Red Sea attacks could rewire Middle East trade and economic cooperation", *Al Monitor*, 3 March 2024. <https://www.al-monitor.com/pro/memos/how-red-sea-attacks-could-rewire-middle-east-trade-and-economic-cooperation>

<sup>2</sup> Hanna Duggal, Mohammed Haddad, "Mapping the Red Sea Attacks", *Al Jazeera*, 22 February 2024. <https://interactive.aljazeera.com/aje/2024/mapping-red-sea-shipping-attacks/>

<sup>3</sup> David Ottaway, "Yemen's Houthis Upset US Middle East Security Calculations", *Wilson Center*, 10 June 2024. <https://www.wilsoncenter.org/article/yemens-houthis-upset-us-middle-east-security-calculations>

billion).<sup>4</sup> The Red Sea area falls under what Indian naval commanders call their “primary maritime zone of interest”.

A month after the attacks began, the U.S. administration of President Biden launched Operation Prosperity Guardian to protect commercial shipping in the Red Sea. The U.S. Navy deployed one aircraft carrier strike group (including the *USS Dwight D. Eisenhower* carrier and three warships).

At first, some European nations such as France and Italy contributed to Prosperity Guardian—their ships remained outside U.S. command. However, others like Spain, a major European contributor to naval operations, refused to join the U.S.-led Prosperity Guardian out of ‘a commitment to peace’, indicating the transatlantic rift on managing the conflict.<sup>5</sup>

Soon, Paris and Rome pulled out their assets when the European Union (EU) launched its own mission. The operation, dubbed ASPIDES (ancient Greek for “shields”), brought together French, Italian, and German warships, among others. The European intervention reflected both a growing unease among its governments with the U.S. Middle East policy and a desire in Brussels to raise its own profile in maritime operations.

The European resolve to act independently to ensure maritime security sent a strong message to its Middle East and Asia partners. However, the EU faced challenges securing diplomatic support from local actors (namely, India and Gulf states). It also encountered difficulties deploying adequate naval capabilities, highlighting a disconnect between Brussels’ ambitions and its means.

Against that backdrop, Operation ASPIDES provides a case study illustrating the promises and shortcomings of the EU’s maritime policy. Throughout the assessment of this mission, one can grasp the European naval ambitions and the process of defence policymaking within the EU. Ultimately, the challenges faced by ASPIDES foreshadow issues that European navies will also encounter in the Indo-Pacific region as they keep raising their profile there.

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<sup>4</sup> K. Bharat Kumar, “The Red Sea churns: India’s economic costs mount”, *The Hindu*, 13 March 2024. <https://www.thehindu.com/business/watch-economic-costs-of-continued-conflicts-on-the-red-sea/article67947997.ece>

<sup>5</sup> Reuters, “Spain will not intervene in Red Sea – defence minister”, 12 January 2024. <https://www.reuters.com/world/middle-east/spain-will-not-intervene-red-sea-defence-minister-2024-01-12>

## Europe's Search for Strategic Autonomy and the Origins of ASPIDES

When the U.S. government launched Operation Prosperity Guardian in December 2023 under the coordination of the U.S. Fifth Fleet, headquartered in Bahrain, Defense Secretary Lloyd Austin stated that the operation's purpose was 'to uphold the foundational principle of freedom of navigation', which had been challenged by the Houthi attacks.<sup>6</sup> Following the onset of the Red Sea crisis, the White House pursued one primary objective: to prevent the Houthi assaults from opening a new front in the Israel-Hamas war. Washington aimed to protect civilian shipping and degrade the Houthis' firepower – but nothing more – particularly to avoid being drawn into Yemen's decade-long civil war.

Prosperity Guardian's limited objectives – to ensure freedom of passage across the Red Sea – relied on a maritime demonstration of force, with the deployment of U.S. warships to the area to intercept missile and drone attacks, and to prevent the Houthis from seizing commercial vessels. Twenty-four countries publicly joined the coalition, most of them NATO member states. In the Arab world, Bahrain was the only country that acknowledged participation. In Asia, only Singapore and Sri Lanka took part. Overall, the operational contribution of partner nations was symbolic: only the UK dispatched a warship (the *Destroyer HMS Diamond*), while other nations merely sent small teams of naval personnel. Even a close U.S. ally like Australia rejected a request from Washington to send a vessel.<sup>7</sup>

Quickly, the United States estimated that more had to be done. A month after the operation began, President Biden recognised that the United States had failed to deter the Houthis.<sup>8</sup> The latter kept attacking ships, and U.S. officials issued several warnings that were largely ignored. By January 2024, the White House ordered a series of air strikes on Houthi targets inside Yemen. The bombing campaign — codenamed Operation Poseidon Archer — aimed at Houthi airbases, missile launch sites, and weapons factories.

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<sup>6</sup> Joseph Clark, "Austin Lauds Key Partnerships in Middle East", US Department of Defense, 19 December 2023. <https://www.defense.gov/News/News-Stories/Article/Article/3622360/austin-lauds-key-partnerships-in-middle-east/>

<sup>7</sup> Grant Wyeth, "Why Australia isn't sending a ship to the Red Sea", *The Diplomat*, 27 December 2023. <https://thediplomat.com/2023/12/why-australia-isnt-sending-a-ship-to-the-red-sea/>

<sup>8</sup> Oren Liebermann, Nikki Carvajal, "Biden concedes Houthis haven't been deterred from carrying out attacks as US launches further strikes", *CNN*, 18 January 2024. <https://edition.cnn.com/2024/01/18/politics/biden-houthi-strikes>

Prosperity Guardian faced diplomatic challenges, even with the U.S.'s closest allies. Five European states (France, Italy, the Netherlands, Norway, and Spain) officially joined when the Operation was launched. But off the record, diplomats already expressed reservations about the U.S. action. Then, only a few weeks later, their governments suspended their contribution to Prosperity Guardian to start their own operation, codenamed ASPIDES.

The motivations behind the European move varied from country to country. This was partly a rejection of the U.S. approach to the Gaza war, following Washington's rejection of several UN Security Council Resolutions calling for a ceasefire in Gaza. The continuation of U.S. military aid to the Israel Defense Forces (IDF), despite growing allegations of war crimes, created a rift between the U.S. and European governments, especially Spain and Norway, which grew deeply critical of Israel's war.

But Europe's unease over Washington's policy predated the war in Gaza. They went deeper. For several years, European governments have grown wary that the U.S.'s military-centric approach to regional crises could drag them into a local conflict. In late 2008, the EU launched ATALANTA, its own counterpiracy operation in the Bab el-Mandeb Strait, even though the United States led a Combined Task Force 151 and initiated a NATO operation, Ocean Shield, with a similar mandate.

Then, in 2019, a series of unclaimed attacks on tankers in the Persian Gulf led the Trump Administration to launch Operation Sentinel to deter Iranian naval harassment in the Strait of Hormuz. European governments feared that the American approach of 'maximum pressure' towards Tehran would exacerbate the tensions in the region. In a bid to put some distance between Brussels and Washington, they launched their mission, Operation AGENOR, again with a similar purpose to the American one.<sup>9</sup>

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<sup>9</sup> Countries include Belgium, Denmark, France, Germany, Greece, Italy, the Netherlands, Portugal, and Norway.



Like AGENOR in 2019, ASPIDES stemmed from the European belief that the American approach would not solve the problem. EU officials explicitly make the argument. For example, in an interview with international Media, the commander of ASPIDES, Greece's Rear Admiral Vasileios Gryparis, stressed, *'We don't believe that hitting the Houthis might solve the problem. Some other countries tried similar actions some years ago, and others still do, and we see that it is not contributing to the solution to the problem'*.<sup>10</sup>

ASPIDES also derived from the EU ambitions regarding 'strategic autonomy', a central theme in Brussels since it was first mentioned in the EU Global Strategy released in 2016. The EU document of 2016 did not provide a concrete definition of strategic autonomy. Still, it is assumed to imply the ability to rely on its own armed forces for political objectives. Specifically, it requires the *'capacity to independently plan and conduct military operations (...) and to autonomously develop and produce the related defence capabilities with minimal or no assistance'* from external partners.<sup>11</sup>

In the years after the EU Global Strategy, the theme of strategic autonomy gained traction in Europe, particularly due to the U.S.–China competition. As the rivalry between Washington and Beijing intensified during the first Trump presidency (2017–2021), Europeans grew wary of being forced to align their foreign policies with their U.S. ally, despite disagreements on apprehending the China challenge. As a result, European calls to chart an alternative path for the continent to keep the great power competition at bay increased.

The French government of Emmanuel Macron has been at the forefront of the latest initiative. On his way back from a trip to China in 2023, France's President stirred a transatlantic dispute when he asserted, "Europe should not be U.S. vassal (...) The worst of things would be to think that we Europeans must be followers on this subject and adapt ourselves to an American rhythm and a Chinese overreaction".<sup>12</sup>

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<sup>10</sup> Simon Marks, "Fending Off Houthis Requires Double the Fleet, EU Force says", Bloomberg News, 21 June 2024. <https://www.bloomberg.com/news/articles/2024-06-21/fending-off-houthis-requires-double-the-fleet-eu-force-says>

<sup>11</sup> Hugo Meijer, Stephen Brooks, "Illusions of Autonomy: Why Europe Cannot Provide for Its Security If the United States Pulls Back", *International Security*, vol. 45, no.4 (2021), pp.7–43, p.8.

<sup>12</sup> Armen Georgian, "Macron insists EU should not be US 'vassal': Is the French president isolated?", France 24, 28 April 2023. <https://www.france24.com/en/tv-shows/talking-europe/20230428-macron-insists-eu-should-not-be-us-vassal-is-the-french-president-isolated>

ASPIDES can be read as the translation of this European desire to express its difference from the United States. It is a new chapter after ATALANTA and AGENOR of this European ambition for strategic autonomy at sea. However, if the political objective articulated by European governments was coherent, its translation into military action quickly hit several hurdles.

### **A toothless operation?**

At the diplomatic level, the launching of ASPIDES stirred transatlantic tensions. In the spring of 2024, U.S. officials from the Biden administration argued with the author that the EU operation was problematic for two reasons. First, they feared it signalled disunity among NATO allies that weakened Washington's stance against the Houthis and its main backer, Iran. Second, the capabilities behind ASPIDES were not sufficient and undermined the European naval credibility.<sup>13</sup>

The American assertion that the European operation lacks teeth was fair criticism. At the military level, ASPIDES started with contributions from seven countries: Belgium, Denmark, France, Germany, Greece, Italy, and Spain. Greece provided the headquarters, while Italy led the operations. It relied on four multipurpose frigates allocated equally by the French, German, Italian, and Greek navies, which supported 640 merchant ships (and escorted about 370 of them) during the first year of its mandate. It also shot down 18 UAVs, 20 USV drones, and four ballistic missiles, according to EU official statements.<sup>14</sup>

Still, European navies struggled to dispatch a sufficient number of ships. They also suffered from the asymmetric tactics employed by the Houthis. The latter has been repeatedly attacking ships, using cruise and ballistic missiles, as well as uncrewed systems. The cost of intercepting those projectiles is high and puts tremendous pressure on the limited air defense capabilities of European navies. For instance, the French Navy has used Aster 30 surface-to-air missiles to counter multiple Houthi ballistic missiles. The interceptions were successful, but one Aster missile costs roughly US\$1.1 million.

<sup>13</sup> Author's interviews with US and European diplomats in Washington, March 2024.

<sup>14</sup> The Maritime Executive, "EU extends Aspides Freedom of Navigation Mission in the Red Sea", 17 February 2025. <https://maritime-executive.com/article/eu-extends-aspides-freedom-of-navigation-mission-in-the-red-sea-to-2026>

Logistically and financially, the European navies cannot sustain long campaigns on such a scale. In March 2024, during the author's exchanges with Italian officials, they did not hide their concerns that Rome could not afford to intercept the rudimentary arsenal of the Houthis with expensive systems such as U.S. Patriot or THAAD (Terminal High Altitude Air Defense) batteries.<sup>15</sup> To cut costs, European ships have also reportedly avoided using expensive weaponry and have resorted to shooting down drones with machine guns instead.<sup>16</sup>

### Europe's Difficulties in Aligning Strategy and Resources

Beyond the operational demands, the European operation has failed to restore stability in the Red Sea. Just like the U.S. intervention, Prosperity Guardian, ASPIDES might have helped mitigate the costs of the Houthi attacks on the ships crossing the area, but it failed to coerce the Yemeni organisation. This indecisiveness undermines the credibility of European navies as agents of stability. If they struggle to ensure freedom of navigation against a non-state actor like the Houthis, can the Europeans add any value to maritime challenges in the Indo-Pacific that are likely to be more demanding (e.g., in the South China Sea or the Taiwan Strait)?

Furthermore, the sudden conclusion of a ceasefire between the Trump administration and the Houthis in early May 2025 also put Europeans in a delicate situation. The agreement between the Yemeni organisation and the U.S. government to de-escalate largely ignored the EU. It also questions the relevance of ASPIDES in the first place: why assemble a distinct operation if the local actors still consider the United States the only credible interlocutor?

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<sup>15</sup> Author's interview in Rome, Italy, 21 March 2024.

<sup>16</sup> Thomas Newdick, "Italian Destroyer Guns Down Houthi Drone With 76mm 'Super Rapid' Cannon", The War Zone, 4 March 2024. <https://www.twz.com/sea/italian-destroyer-guns-down-houthi-drone-with-76mm-super-rapid-cannon>

Europeans had difficulties conveying the purpose of ASPIDES, starting with their closest ally, the United States. In this context, the leaked correspondence among U.S. officials from the Trump administration regarding the air campaign against the Houthis – known as ‘Signalgate’ – is revealing. These messages show how the U.S. national security advisor, the defense secretary, and the vice president viewed European contributions to the Red Sea operations. In their exchanges, the three American politicians railed against what they perceived as European inaction against the Houthis. Vice President J.D. Vance wrote, ‘I just hate bailing out Europe again.’ At the same time, the National Security Advisor Mike Waltz affirmed that Europeans could not ‘*defend against the types of sophisticated, anti-ship cruise missiles, and drones the Houthis are now using*’.<sup>17</sup>

The substance of the exchange is surprising for several reasons. First, the assessment of European helplessness against Houthi attacks is factually incorrect: as mentioned above, European militaries intercepted Houthi weapons on several occasions. Second, the underlying assumption made by Vance – that the United States conducted airstrikes on the Houthis on behalf of the Europeans – suggested that U.S. officials either dismissed or ignored the desire of those same Europeans to distance themselves from Washington by launching ASPIDES. If the U.S. government was not convinced of this European aspiration, one would not expect Indo-Pacific partners to be convinced either.

In fact, the European operation has gained little traction in the region, despite claims in Brussels that it represented an alternative to the U.S. approach. Initially, the French government asked the United Arab Emirates (UAE) to host the operation’s command. Abu Dhabi already hosts operation AGENOR, which is directed from the French naval base in the Emirati capital city.

This time, however, the UAE declined the invitation to join Operation Prosperity Guardian, wary of being associated with Washington’s support for Israel’s war in Gaza. European officials therefore assumed that the Emiratis might be more inclined to support ASPIDES, but their request was also promptly rejected. As a result, ASPIDES is now headquartered at the Larissa Base in Greece.

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<sup>17</sup> Ivo Daalder, “What Signalgate really tells us”, Politico, 28 March 2025. <https://www.politico.eu/article/journalist-donald-trump-nato-us-signal-group-chat-officials/>

This outcome reveals that, despite Europe's desire for strategic autonomy, the notion that it can truly represent an alternative to the United States has not (yet) convinced regional partners. Many in the region likely consider that, in times of crisis, Europeans remain closely aligned with the United States, rendering their claims of autonomy unpersuasive. The limited naval capabilities contributed to ASPIDES further suggest that participating countries remain heavily reliant on their U.S. ally. At the political level, the intervention was intended to chart a distinct European approach to the Red Sea crisis, but doing so required a military buildup sufficient to demonstrate the EU's resolve.

Overall, this highlights a disconnect between European ambitions in maritime security and their military resources. As shown with ASPIDES, this is particularly true in the naval domain, where European governments reduced procurement for a long time after the end of the Cold War. It is estimated that budget cuts between 1999 and 2018 led European navies to lose about 30% of their available frigates and destroyers, and 20% of their available submarines. This downsizing led analysts to warn against Europe's 'sea blindness' and to castigate the governments' neglect of their naval forces.<sup>18</sup>

The difficulties of EU countries in gathering enough ships for that purpose may also stem from competing priorities among allies. Whereas France, Spain, Greece, and Italy traditionally invest in maritime security in the Middle East and the western Indian Ocean, this is less true of Eastern European and Baltic states, which prioritise their capabilities on deterring a Russian threat, especially since the Ukraine war started in 2022.

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<sup>18</sup> Jeremy Stöhs, "Into the Abyss? : European Naval Power in the Post-Cold War Era", *Naval War College Review*, vol.71, no.3 (2018), pp.13-40.

## Implications for Europe and its Indo-Pacific Partners

Operation ASPIDES reveals the promises and shortcomings of European ambitions in maritime security. Addressing the misalignment between strategy and resources is necessary to ensure European credibility in the Indo-Pacific. The challenge is understood and acknowledged in Brussels. In a candid interview, the Director General of the EU Military Staff, the Dutch Lieutenant General Michiel van der Laan, admitted the need to address the insufficient capabilities deployed for ASPIDES: *‘There aren’t enough of them. There is only enough to complete the most demanding tasks, but we could do much more (...). Each political decision should be preceded by an assessment of the needs before launching the force generation process, because there is no obligation for Member States, apart from a moral obligation, to contribute.’*<sup>19</sup>

Europe’s naval engagement in the Indo-Pacific must rely on a better adequation between political objectives and capabilities available. In the long term, it implies new procurement policies, including more joint initiatives among EU navies to pool their resources. For example, the development of the European Patrol Corvette (EPC) is a positive signal from four EU countries (Italy, France, Greece, and Spain) to address this capability gap. Initiated in 2019, the EPC project will deliver new corvettes by 2030. It involves diplomatic and industrial cooperation (with national companies such as Fincantieri, Naval Group, and Navantia). Moreover, the European Defence Fund provided USD\$202 million to produce the first prototype.

If Europe addresses this capability gap, then it will be better positioned to foster its strategic dialogue with Indo-Pacific partners. The EU’s strategic goal is not to compete with the U.S. or the Chinese naval capabilities. The purpose of the EU naval posture in the Indo-Pacific is to contribute to shaping maritime governance in coordination with like-minded partners, not to prepare for great power competition.

Eventually, the EU message on strategic autonomy resonates with many local countries. For middle powers and small states in Asia, the European desire to de-emphasise great power competition and focus on maritime security as a collective endeavour is appealing. From that perspective, India should be a key partner in the

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<sup>19</sup> Olivier Jehin, “Il serait préférable d’engager la génération de forces avant toute décision de lancement d’une opération”, Club Bruxelles 2, 28 April 2025. <https://club.bruxelles2.eu/2025/04/entretien-il-serait-preferable-dengager-la-generation-de-forces-avant-toute-decision-de-lancement-dune-operation-michiel-van-der-laan/>

EU naval dialogue. As mentioned above, Delhi deployed its own maritime operation in the Red Sea. It shares similar views to the Europeans regarding the need to keep good ties with the U.S. Navy while protecting its distinct approach to conflict management. Southeast Asian countries like Indonesia, Singapore, and Malaysia are also keen on developing closer ties with European navies without jeopardising their existing ties with China.

EU officials insist that one of the priorities in their Indo-Pacific engagement is ‘capacity building’ – i.e., providing technical assistance to local navies to help with their modernisation. This is complemented by the European concept of ‘*coordinated maritime presences*’, which is meant as a ‘*light and flexible instrument that allows EU Member States present in areas of maritime interest to share awareness, analysis and information*’.<sup>20</sup> It implies an EU naval presence in the Indo-Pacific that would not require permanent resources deployed in the bases and ports of local partners.

This represents an innovative way to conduct naval diplomacy, but just like with ASPIDES, the EU should ensure its Member States have sufficient means to support that approach. Greater investment in maritime capabilities will enable Brussels to meet its own expectations in the Indo-Pacific. In the end, ASPIDES surely shows the challenges faced by the Europeans in ensuring maritime security, but the lessons learnt from it can also be a stepping stone for its engagement with Asian navies.

## About the Author

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<sup>20</sup> European Commission *Joint Communication to the European Parliament and the Council: The EU Strategy for Cooperation in the Indo-Pacific*, 16 September 2021. [https://www.eeas.europa.eu/sites/default/files/jointcommunication\\_2021\\_24\\_1\\_en.pdf](https://www.eeas.europa.eu/sites/default/files/jointcommunication_2021_24_1_en.pdf).





# COAST GUARD DIPLOMACY: PATHWAY FOR A HEIGHTENED EU PRESENCE IN SOUTHEAST ASIA'S MARITIME SECURITY LANDSCAPE

*Abel Josafat Manullang & Yosua Saut Marulitua Gultom*

## Introduction

The Indo-Pacific has been a centre point of great power interest. The same attention has also been extended to the heart of the Indo-Pacific itself, that is Southeast Asia, not to mention its maritime domain that commands immense importance for the world as it sees vast international movements of vessels, people, and goods from various origins. To date, the region has become a stage for global competition between the United States and China as both seek to establish their influence. In that thriving landscape, the Association of Southeast Asian Nations (ASEAN), Southeast Asia's regional bloc, and its Member States have inexorably caught the spotlight as well.

Among the many issues facing the region, maritime security has emerged as a central concern for ASEAN, and, by extension, its Member States. In the past, the region has witnessed a range of threats stemming from both state and non-state actors. From piracy in the Malacca Strait to the perennial disputes in the South China Sea, ASEAN has sought to address these issues through various means - ranging from deliberative fora to operational initiatives in the field. One of the key instruments used by ASEAN Member States is their coast guard units, especially in the conduct of joint patrols. The civilian of these agencies allows Member States to engage them in maritime security activities without arousing the sensitivities that might accompany the use of more militarised forces.<sup>1</sup>

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<sup>1</sup> Darmawan, Aristyo Rizka. 2022. "Coast guard diplomacy and maritime security in Southeast Asia." Asia & The Pacific Policy Society, April 22. Accessed May 3, 2025. <https://www.policyforum.net/coast-guard-diplomacy-and-maritime-security-in-southeast-asia/index.html>

Additionally, both the United States and China are no stranger to the use of coast guards as they have used them across their many endeavours. The United States, being a Pacific power, has carried out its own coast guard cooperative engagements with states in Southeast Asia and the Pacific. The same goes for China as it has demonstrated a firm use of coast guards in accentuating its claim in the contested South China Sea and its many activities there. Setting aside the different nature of their use, it is apparent even among said global powers that coast guards are useful instruments for their respective engagement in the region.

However, the European Union (EU) has not been as active as its two counterparts in the region's maritime domain. Amid the strategic waves generated by the global powers, the EU has been relatively left behind in its maritime-security engagement with the regional states. While the United States and China have expanded the use of their coast guards to project influence, the EU still maintains little to no presence in this area. This gap nevertheless presents a valuable opportunity for the EU to deepen its engagement in the region's growing maritime-security architecture – particularly given that, despite not having a major stake in the region's geopolitical dynamics, the EU has built and maintained strong ties with ASEAN and its Member States through a strategic partnership in 2020.

Against this backdrop, the article examines why and how the EU can step up its presence in Southeast Asia, particularly in the maritime security landscape. It begins by laying out the growing attention to the use of coast guard operations among ASEAN Member States, followed by an overview of how the United States and China employ their own coast guards to advance strategic objectives. The discussion then turns to how the EU can follow suit – drawing on its regional coast guard experience and the robust ties it has already established with ASEAN and its Member States. Through such engagement, the EU can demonstrate its commitment to multilateralism and rule-based governance, while contributing meaningfully to the region's evolving maritime security architecture.

## The Burgeoning Role of Coast Guard in ASEAN

The growing role of coast guards in ASEAN maritime security architecture stems from several interrelated factors: the increasing importance and interconnectedness of maritime security, the proliferation of non-state threats, and the vast expanses of sea that must be safeguarded despite the region's limited enforcement capacity. To begin with, maritime security plays a vital role, as the sea underpins both the economic power of states and the livelihoods of maritime communities across the region. In addition, non-state threats, such as drug trafficking at sea, have become particularly challenging, given the speed and fluidity with which such activities occur and dissipate. This challenge is further compounded by the limited maritime domain awareness and enforcement authority of many state agencies; in numerous cases, perpetrators can quickly evade pursuit by crossing into neighbouring countries' waters. These factors together highlight the deep interconnectedness that characterises the region's maritime security environment.

Moreover, many ASEAN Member States lack sufficient maritime patrol and surveillance capacity to maintain firm control over their waters,<sup>2</sup> let alone comprehensive maritime domain awareness. This situation has prompted Member States to cooperate in addressing their respective capacity gaps and to strengthen collective control, given the high degree of interconnectedness between one state's maritime security and another.<sup>3</sup> This awareness has, in turn, drawn greater attention to their coast guard agencies, particularly in their capacity to serve as instruments of cooperation for enhancing shared maritime security.

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<sup>2</sup> Chakraborty, Ranamita. 2022. "ASEAN states lead in regional maritime security cooperation, but more needs to be done, say experts." 2022. Govinsider, October 10. Accessed May 3, 2025. <https://govinsider.asia/intl-en/article/asean-states-lead-in-regional-maritime-security-cooperation-but-more-needs-to-be-done-say-experts>

<sup>3</sup> Bueger, Christian. 2015. "What Is Maritime Security?" *Marine Policy* 53: 159-164. Accessed May 10, 2025.

A good example of coast guard cooperation in ASEAN is the creation, or the ongoing effort to institutionalise, the ASEAN Coast Guard Forum (ACF). The ACF is set to serve as the regional forum in which ASEAN Member States can work together to maintain maritime security through their respective coast guard agencies or its equivalent units. In 2022, ASEAN witnessed the first run of ACF which was hosted by Indonesia.<sup>4</sup> The torch of development was then extended to Indonesia as it continued to host ACF in 2023. Following the 2024 ACF in the Philippines, Thailand then hosted the 4th ACF that was concluded in June 2025. Over the years, the ACF has witnessed the participation of various ASEAN Member States, from the founding Member States like Indonesia and the Philippines, to the conflict-ridden Myanmar.<sup>5</sup> The successive rounds of deliberations surrounding ACF demonstrate ASEAN Member States' desire to bring this initiative to fruition.

In addition, field collaboration among ASEAN Member States further illustrates the growing attention to coast guard cooperation in Southeast Asia. Even before the establishment and expansion of the ACF, coast guards had played a central role in the region's maritime governance. As discussed earlier, the high degree of interconnectedness that characterises regional maritime security continues to encourage ASEAN Member States to work closely together. Among the various maritime security cooperation mechanisms, many rely directly on coast guard engagement. This awareness of the need for collaboration has translated into numerous initiatives, ranging from joint patrols to port visits.

A notable example is the *Arman 114* case, which began when Indonesian authorities – through Bakamla RI (Indonesian Maritime Security Agency) – and the Malaysian Maritime Enforcement Agency (APMM) cooperated to apprehend an Iranian-flagged tanker, *MT Arman 114*, in the North Natuna Sea in July 2023. The vessel, carrying about 272,569 metric tons of light crude oil valued at approximately USD\$304 million, was suspected of conducting an illegal ship-to-ship oil transfer

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<sup>4</sup> Widyati, Putu Diah Kharisma. 2022. "Bakamla RI Gelar ASEAN Coast Guard Forum 2022." RRI, November 22. Accessed May 3, 2025. <https://www.rri.co.id/nasional/94352/bakamla-ri-gelar-asean-coast-guard-forum-2022>

<sup>5</sup> Uy, Michael L. 2024. "ASEAN Coast Guard Forum 2024 to build SEA-PEACE." Philippine Information Agency. June 6. Accessed July 15, 2025. <https://pia.gov.ph/asean-coast-guard-forum-2024-to-build-sea-peace/>.

with the Cameroon-flagged *MT S Tinos*.<sup>6</sup> The transfer took place without submitting a plan to the Indonesian authorities, as required under Indonesian law and the International Convention for the Prevention of Pollution by Ships (MARPOL). During the operation, *MT Arman 114* was found to have manipulated its Automatic Identification System (AIS), falsely showing its location as the Red Sea – a move Indonesian authorities interpreted as evidence of malicious intent.<sup>7</sup> The tanker was also suspected of dumping oil into Indonesian waters, breaching environmental law before fleeing into Malaysian waters.<sup>8</sup> Although *MT S Tinos* managed to escape, Bakamla RI continued the pursuit into Malaysian waters, where APMM assisted in apprehending the Iranian vessel. The case highlights the robust operational ties between Indonesia and Malaysia and their shared understanding of regional maritime security.

Amid intensifying U.S.–China competition, coast guard cooperation offers ASEAN Member States a valuable platform for continued collaboration. Coast guard forces have the capacity and legal standing to act as maritime security actors that represent their states without provoking the sensitivities often associated with a military presence. This advantage allows ASEAN Member States to cooperate in maintaining maritime security despite divergent positions on certain issues – such as territorial disputes in the South China Sea. For instance, despite overlapping claims, Vietnam and the Philippines have maintained open communication and pursued pragmatic cooperation, including joint coast guard exercises and plans for a maritime security memorandum.<sup>9</sup> Such cooperation is not necessarily directed against any single country; rather, it encompasses responses to both state and non-state threats. The growing recourse to coast guard agencies therefore reflects ASEAN Member States' adaptation to evolving geopolitical dynamics, particularly the U.S.–China rivalry, as well as to non-traditional threats such as piracy and trafficking.

<sup>6</sup> The Jakarta Post. 2023. "Indonesian coast guard seizes Iranian-flagged tanker." July, 11. <https://www.thejakartapost.com/indonesia/2023/07/11/indonesian-coast-guard-seizes-iranian-flagged-tanker-.html>

<sup>7</sup> Liliansa, Dita. 2023. "The sticky case of Indonesia, a seized Iranian oil tanker, and legal jurisdiction." Lowy Institute, accessed 18 July 2025. <https://www.loyyinstitute.org/the-interpreter/sticky-case-indonesia-seized-iranian-oil-tanker-legal-jurisdiction>

<sup>8</sup> Gunawan, Yordan, Muhammad Fathi and Mustafad Ghiffara. 2024. "Analyzing MT Arman 11 Case: Dispute Settlement in Seizure of Ship's Action under International Law." *al-Daulah Jurnal Hukum Dan Perundangan Islam* 14, Nr. 1 (5. April): 61–85. Accessed May 10, 2025.

<sup>9</sup> Flores, Mikhail. 2024. "Philippines, Vietnam boost military ties amid South China Sea tensions." Reuters. Accessed July 16, 2025. <https://www.reuters.com/world/asia-pacific/philippines-vietnam-sign-defence-agreement-2024-08-30/>

## The United States and China's Coast Guard Trails

As previously hinted, both the United States and China have established prominent presence in the heart of the Indo-Pacific. Among their many means, they have used their respective coast guards in their engagement with ASEAN Member States. Given the prominence of both states in the region, it is important to note how they both utilise their coast guards as well as the difference in their uses.

To begin with, as one of the Pacific's major powerhouses, the United States maintains an undeniable presence in the region. In the maritime domain, the United States has launched numerous initiatives to reinforce this presence – chief among them the Freedom of Navigation Operations (FONOPs), in which the U.S. Coast Guard has recently taken part.<sup>10</sup> The Coast Guard's approach to the region revolves around three key strategies: maritime governance, persistent presence, and meaningful engagement.<sup>11</sup> Persistent presence focuses on maintaining consistent interaction with partners, while meaningful engagement seeks to tailor cooperation to each partner's specific needs. Finally, under maritime governance, the U.S. Coast Guard aims to lead and promote safety and security at sea and to strengthen global maritime governance through sustained international engagement across diverse fields.

The United States' meaningful engagement and persistent presence in the region are exemplified by its capacity building initiatives. One example is the Anambas Maritime Training Center in Batam, Indonesia<sup>12</sup> – funded and developed jointly by the U.S. government, including the U.S. Coast Guard, and Bakamla RI. The United States also regularly donates or transfers decommissioned coast guard vessels or cutters to

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<sup>10</sup> Storey, Ian. 2021. "The US Coast Guard and the Indo-Pacific: Straddling the Sweet Spot between Diplomacy and Lethality." *Fulcrum*, January 29. Accessed May 10, 2025. <https://fulcrum.sg/the-us-coast-guard-and-the-indo-pacific-straddling-the-sweet-spot-between-diplomacy-and-lethality/>

<sup>11</sup> [https://www.dhs.gov/sites/default/files/2025-02/2024\\_1126\\_uscg\\_indopacific\\_strategic\\_intent\\_and\\_update\\_fy2021and\\_fy2023.pdf](https://www.dhs.gov/sites/default/files/2025-02/2024_1126_uscg_indopacific_strategic_intent_and_update_fy2021and_fy2023.pdf) (Accessed May 3, 2025).

<sup>12</sup> US Embassy Jakarta. 2024. Amerika Serikat dan Bakamla RI Rayakan Peresmian Pusat Pelatihan Maritim "Anambas" di Batam." US Embassy Jakarta, January 30. Accessed May 3, 2025. <https://id.usembassy.gov/id/amerika-serikat-dan-bakamla-ri-rayakan-peresmian-pusat-pelatihan-maritim-anambas-di-batam/>

ASEAN Member States such as Vietnam<sup>13</sup> and Malaysia<sup>14</sup>. To further support regional capacity building, Washington established the U.S. Coast Guard's Southeast Asia Training Team (SEATT), which recently completed a maritime security exercise with the Philippine Coast Guard.<sup>15</sup> More recently, the United States spearheaded a coast guard initiative with its fellow Quad members – the Quad at Sea Observer Mission<sup>16</sup> – in which the U.S. Coast Guard plays a leading role in promoting maritime security and coast guard interoperability among and with regional partners.

China's presence in the region's maritime domain is closely tied to its claims in the South China Sea, with the China Coast Guard (CCG) serving as a critical instrument for advancing its maritime interests.<sup>17</sup> China's employment of the CCG is largely unilateral, serving almost exclusively its own objectives with little regard for the interests of other states. This is evident in the frequent clashes between CCG and fishermen or coast guard vessels from Indonesia, Malaysia, Vietnam, and, most recently and frequently, the Philippines.<sup>18</sup>

The CCG has also been reported to escort and protect Chinese fishing fleets operating in contested waters – actions widely perceived as coercive tactics designed to intimidate and displace foreign fishermen. Numerous reports document such intimidation against vessels from Vietnam, Indonesia, and the Philippines. These encounters are part of China's broader effort to consolidate its presence and claims

<sup>13</sup> Anh, Vu. 2021. "US hands over training facilities to Vietnam coast guard." VnExpress International, 18. April. Accessed May 10, 2025. <https://e.vnexpress.net/news/news/us-hands-over-training-facilities-to-vietnam-coast-guard-4264765.html>.

<sup>14</sup> BERNAMA. 2024. "MMEA to Receive Ex-USCGC Steadfast Next Year." March 8, 2024. Accessed July 15, 2025. <https://www.bernama.com/en/news.php?id=2325079>.

<sup>15</sup> Solmaz, Fatma Zehra. 2025. "US, Philippines conduct multilateral maritime security training." Anadolu Ajansı, January 27. Accessed May 3, 2025. <https://www.aa.com.tr/en/asia-pacific/us-philippines-conduct-multilateral-maritime-security-training/3463882>

<sup>16</sup> Panneerselvam, Prakash. 2024. "The Quad's Coast Guard Cooperation: New Dynamics in Power Politics." *The Diplomat*, October 17. Accessed May 10, 2025. <https://thediplomat.com/2024/10/the-quads-coast-guard-cooperation-new-dynamics-in-power-politics/>

<sup>17</sup> Armour, Michael D. 2017. "The US Coast Guard in the South China Sea: Strategy or Folly?" *CIMSEC*, November 6. Accessed May 10, 2025. <https://cimsec.org/u-s-coast-guard-south-china-sea-strategy-folly/>

<sup>18</sup> Pedrozo, Raul. 2021. "The China Coast Guard Law (2021): A New Tool for Intimidation and Aggression." *Maritime Security* 3: 1-44. Accessed May 10, 2025.

in the South China Sea,<sup>19</sup> alongside the construction of artificial islands and military installations. At times, these confrontations have escalated into violent clashes causing casualties and further damaging China's regional image. Therefore, China's use of the CCG stands in stark contrast to that of the United States, which seeks to build and strengthen bridges across the region's maritime security landscape.

In sum, the use of coast guards forces by both the United States and China serves the same overarching purpose: to strengthen their presence and influence in the Indo-Pacific – whether to foster confidence among partners or to assert control over contested areas. Understanding these patterns of coast guard engagement highlights the opportunity for the EU to develop its own approach to regional coast guard cooperation and contribute more meaningfully to the maritime security landscape of Southeast Asia.

### **A Bond between Two Blocs: ASEAN and the EU**

The security cooperation between ASEAN and the EU has matured significantly over the past five decades, transitioning from a limited dialogue to a more comprehensive strategic engagement. Beginning as a dialogue partnership in 1977, the relationship gained momentum with the 2003 Joint Declaration on Combating Terrorism, which marked a formal commitment to address non-traditional security threats such as terrorism and transnational crime.<sup>20</sup> Over time, the EU has deepened its role in regional security by participating in ASEAN-led mechanisms that later evolved into the establishment of the ASEAN-EU Strategic Partnership in 2020, reaffirming shared commitments to multilateralism and the rule-based order.<sup>21</sup>

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<sup>19</sup> Mistry, Taasha. 2025. "China's Influence Operations in the South China Sea and the Global South as a Means of Power Projection." *Modern Diplomacy*, February 15. Accessed May 10, 2025. <https://modern diplomacy.eu/2025/02/15/chinas-influence-operations-in-the-south-china-sea-and-the-global-south-as-a-means-of-power-projection/>

<sup>20</sup> Le, Kiet Hoang, Hiep Xuan Tran, and Thang Duc Tran. 2024. "ASEAN-EU Relations in the First Two Decades of the 21st Century and Some Impacts on Vietnam." *The Russian Journal of Vietnamese Studies* 8, no. 3: 6-18. Accessed May 13, 2025.

<sup>21</sup> <https://euinasean.eu/security-and-defence-cooperation/> (Accessed May 13, 2025).



The ASEAN-EU cooperation presented above could be seen as a pragmatic one, which focuses on practical, real-world outcomes and consequences over abstract ideals or ideological commitments.<sup>22</sup> Amid the growing U.S.–China rivalry in the region, both ASEAN and the EU have shared a growing commitment to regional stability and a rules-based international order, which forms the basis of their strategic partnership. This can be viewed as an opportunity to enhance their own autonomy and resilience amid great power rivalry. Recognising the threats in the region, both regional actors seek to maintain an inclusive, multilateral approach that avoids hard power confrontations.<sup>23</sup>

In addition, the EU's 2021 Strategy for Cooperation in the Indo-Pacific aligns closely with the ASEAN Outlook on the Indo-Pacific, reaffirming the EU's support for ASEAN-led mechanisms and regional stability.<sup>24</sup> Their security cooperation includes joint efforts on maritime security, cybersecurity, counterterrorism, and combating transnational crimes, with regular high-level dialogues such as the ASEAN-EU High-Level Dialogue on Maritime Security and the ASEAN Regional Forum. The EU supports ASEAN's central role through engaging in ASEAN-led security frameworks like the ASEAN Defence Ministers Meeting Plus (ADMM-Plus) and emphasises capacity-building and normative influence rather than hard military power, given its lack of a standing military and geographic distance. This partnership highlights the EU's intention to be a relevant actor in Southeast Asia and provides ASEAN with an alternative partner that aligns with its principles of neutrality and centrality.<sup>25</sup>

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<sup>22</sup> Gilson, Julie. "EU-ASEAN relations in the 2020s: pragmatic inter-regionalism?" *International Economics and Economic Policy* 17, no. 3: 727-745. Accessed May 13, 2025.

<sup>23</sup> Ambrosone, Tullio. 2023. "EU and ASEAN: Navigating the Turbulence between the US and China." *Associazione Italia ASEAN*, December 1. Accessed May 13, 2025. <https://www.itasean.org/en/il-ruolo-critico-di-asean-e-ue-tra-usa-e-cina/>

<sup>24</sup> Lin, Joanne. 2021. "The EU in the Indo-Pacific: A New Strategy with Implications for ASEAN." *ISEAS Perspective* 164: 1-9. Accessed May 14, 2025.

<sup>25</sup> Wong, Andrea Chloe. 2014. "The EU and ASEAN Prospects for Inter-Regional Cooperation." *NFG Policy Paper Series* 3: 3-13. Accessed May 13, 2025.

The recent Plan of Action to Implement the ASEAN-EU Strategic Partnership (2023-2027) emphasises deepening strategic dialogue, supporting ASEAN centrality in regional security, and cooperating on maritime security, cybersecurity, and peacebuilding efforts.<sup>26</sup> Both sides prioritise maintaining peace, stability, and adherence to international law in sensitive areas such as the South China Sea, reflecting a mature and multifaceted security partnership grounded in mutual benefit and respect for ASEAN-led processes. According to the document, ASEAN and the EU have committed to enhancing maritime security cooperation through multiple concrete measures. They have regularly conducted the ASEAN-EU High Level Dialogue on Maritime Security Cooperation since 2013 on an annual basis.<sup>27</sup> Additionally, the EU also participates in the ASEAN Regional Forum's Inter-Sessional Meeting on Maritime Security to exchange views, experiences, and best practices, including sustainable joint management of marine resources. It highlights how inter-regional partnerships can serve as vital mechanisms to balance influence, promote transparency, and safeguard freedom of navigation amidst U.S.–China rivalry. Therefore, ASEAN-EU cooperation not only enhances maritime security but also exemplifies how rules-based engagement can mitigate risks and contribute to a more stable and inclusive regional order.

The existing cooperation landscape underscores the EU's growing awareness and commitment to maritime security cooperation. However, the current EU-ASEAN relations largely remain within the realm of soft power, focused on dialogues, capacity building, and information sharing rather than robust operational presence. To enhance its strategic role in the Indo-Pacific, the EU could build an EU-ASEAN Members Coast Guard engagement which could increase the EU's tangible presence and influence. To that end, there are some means that the EU can resort to.

### **The Anchor for the EU's Coast Guard Engagement**

The road for the EU to engage ASEAN through its coast guard remains open. For starters, the EU can capitalise on ASEAN's ongoing progress to institutionalise the

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<sup>26</sup> <https://asean.org/wp-content/uploads/2022/08/ASEAN-EU-Plan-of-Action-2023-2027-FINAL.pdf> (Accessed May 14, 2025).

<sup>27</sup> [https://www.eeas.europa.eu/sites/default/files/factsheet\\_maritime\\_security.pdf](https://www.eeas.europa.eu/sites/default/files/factsheet_maritime_security.pdf) (Accessed July 15, 2025).

ACF. For that, the EU could leverage on its regional coast guard agency, in the form of Frontex, along with its coast guard forum, the European Coast Guard Functions Forum (ECGF), in engaging with ASEAN. The engagement can be tailored around advisory overtures on the creation of a regional coast guard forum given the EU's experience on the matter. In this regard, the EU can seek to engage some ASEAN Member States, chief among them Indonesia and the Philippines given their role in ACF deliberations in recent years as well as Thailand, following the recent completion of the 4th ACF back in June 2025, as well as Malaysia which plans to host the 2026 ACF.<sup>28</sup> This move can be based on the Plan of Action to Implement the ASEAN-EU Strategic Partnership (2023-2027), considering one of its foci on enhancing ASEAN-EU cooperation in ASEAN-led security architecture. Since the ACF itself can be seen as one of ASEAN's security architectures, the EU can explore cooperation opportunities in advisory or experience sharing.

Aside from the focus on ACF, the EU can bolster its coast guard capacity building overtures with ASEAN Member States. Despite its long record of engagements with EU Member States, Frontex still has the leeway to explore cooperation opportunities with ASEAN Member States. Referring to Frontex International Cooperation Strategy (2021-2023), it has sought to assist its Member States to engage its Southeast Asian counterparts through mutual interest cooperation.<sup>29</sup> Aside from the written intention, Frontex was also involved recently in a maritime security overture with Malaysia. In 2023, the EU supported Malaysia's capacity building through the Enhancing Security and International cooperation in the Indo-Pacific (ESIWA) project, particularly in maritime-related cybersecurity.<sup>30</sup> This was followed in April 2024 by the first EU-Malaysia maritime counterterrorism training in Sabah, which facilitated deliberations between Frontex and Malaysia's Eastern Sabah Security Command (ESSCOM). With that in mind, the road to coast guard engagement for either Frontex or the EU are not so alien to take.

<sup>28</sup> Indonesia Defense Magazine. 2025. "Bakamla RI-Malaysia Bahas Pelaksanaan ASEAN Coast Guard Forum 2026." Indonesiadefense.co. March 3. Accessed July 15, 2025. <https://indonesiadefense.com/bakamla-ri-malaysia-bahas-pelaksanaan-asean-coast-guard-forum-2026/>.

<sup>29</sup> [https://www.frontex.europa.eu/assets/Key\\_Documents/Internation\\_Cooperation\\_Strategy/Frontex\\_International\\_Cooperation\\_Strategy\\_2021-23.pdf](https://www.frontex.europa.eu/assets/Key_Documents/Internation_Cooperation_Strategy/Frontex_International_Cooperation_Strategy_2021-23.pdf) (Accessed May 3, 2025).

<sup>30</sup> <https://www.eeas.europa.eu/sites/default/files/documents/2024/Press%20release%20-%20Sabah%20Maritime%20CT%20training.pdf> (Accessed May 14, 2025).

In engaging with ASEAN Member States, it is important for the EU to tailor its approach in accordance with the needs and posture of each state as opposed to going with a one-size-fits-all approach. Some of the leading considerations to this matter can be boiled down to coast guard capacity building and the relevant non-state actors. For example, some states like Indonesia, the Philippines, and Malaysia can benefit from coast guard capacity building surrounding interoperability and maritime domain awareness. Such is the case given the close distance between the three ASEAN Member States and the myriad maritime security issues, notably non-state ones, they face. For this, the EU has the flexibility to engage them bilaterally or multilaterally via ASEAN-led forums. Given the enormous scope of issues surrounding maritime security governance, the EU can flexibly tailor their approach despite the presence of a dividing maritime security issue like the South China Sea dispute (as have several other authors explored in this Panorama Issue).

To materialise these opportunities, the EU can strengthen its cooperation either directly with ASEAN or with its individual Member States, while facilitating the implementation of parallel initiatives. The latter approach has already been pursued – though still on a limited scale – by Italy, France, and Germany, which have become ASEAN’s development partners in the field of maritime cooperation. Beyond engagement with ASEAN as a bloc, other EU Member States have also entered bilateral maritime cooperation frameworks with ASEAN Member States in recent years – for example Spain<sup>31</sup> and the Netherlands<sup>32</sup> with Indonesia. Although these existing initiatives have not yet extended to coast guard engagements, they could readily evolve in that direction in the near future. This does not mean undermine ASEAN’s centrality: rather, the EU should view bilateral partnerships as both an entry point and a complement to broader region-wide frameworks.

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<sup>31</sup> Lavenia, Anastasya. 2025. “Indonesian Gov’t Signs Rp6.5 Trillion Loan Deal with Spain to Fund Maritime Project.” *Tempo English*, April 16. Accessed May 10, 2025. <https://en.tempco.co/read/1997453/indonesian-govt-signs-rp6-5-trillion-loan-deal-with-spain-to-fund-maritime-project>

<sup>32</sup> Kenzu, Ade J. 2023. “Indonesia, Netherlands strengthen maritime sector cooperation.” *Antara News*, October 16. Accessed May 10, 2025. <https://en.antaranews.com/news/296340/indonesia-netherlands-strengthen-maritime-sector-cooperation>

## Conclusion

All things considered, the EU has various options to accelerate its presence through coast guard diplomacy with ASEAN and its Member States. To begin with, the EU has already established bridges with ASEAN and its Member States over maritime security issues as apparent in the numerous agreements and initiatives between the two. The EU is also experienced in the development of a regional coast guard forum, something that ASEAN is still working on as per the ACF framework. Furthermore, the EU can also facilitate its Member States to explore parallel coast guard initiatives with ASEAN Member States, particularly in practical means involving capacity building, information sharing, and more. The growing presence of the EU and the many opportunities it presents to Southeast Asia's maritime security landscape is a welcomed development for the region. Additionally, amid the U.S.–China competition, a heightened EU presence also presents ASEAN a viable partner to work with as part of its hedging game. Through such an endeavour, it can strengthen its relevance in the region that has increasingly attracted other powers as well beyond the United States and China. More importantly, the EU would give itself the opportunity to advance its values to the region's maritime security architecture, namely multilateralism and rule-based governance.

## About the Authors

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# MARITIME SECURITY AND GEOPOLITICAL RIVALRY IN THE INDIAN OCEAN: WHAT ROLE FOR EUROPEAN NAVAL FORCES?

*Dr. Heiko Herold*

## Introduction

The Indian Ocean has become a central arena in the global systemic rivalry between autocracies and democracies. Key players such as China, Iran, India, and the United States are competing for influence over strategic sea lanes that are crucial for global trade and energy flows. The European naval presence in the region has traditionally been limited, but growing security challenges – such as piracy, smuggling and the militarisation of key chokepoints – require greater European engagement. A stronger naval presence through joint EU operations, capacity building with regional partners and strategic deployments could enhance maritime security and protect Europe's economic interests. However, limited resources and political fragmentation within the EU pose a challenge to a coherent strategy. A better coordinated European maritime approach in the Indian Ocean would make an important contribution to promoting regional stability, reinforcing the rules-based international order and strengthening Europe's global strategic position.

## The Indian Ocean On The Geopolitical Chessboard

The Indian Ocean with its various marginal seas, gulfs and straits is of considerable geostrategic and geopolitical importance. It is the third largest ocean on Earth after the Pacific and Atlantic, and connects four continents: Asia to the north, Africa to the west, Australia to the east, and Antarctica to the south. For centuries, it has been at the centre of global trade flows between East and West, especially between Asia and Europe. From a European perspective, it is the gateway to the vibrant Indo-Pacific economic area. A large part of the sea trade between Asia, Africa, and Europe is handled via the international shipping routes in the Indian Ocean. It also encompasses five of the eight primary maritime chokepoints, namely the Bab al-Mandab Strait, the Strait of Malacca and Singapore, the Strait of Hormuz, the Suez

Canal, and the Cape of Good Hope.<sup>1</sup> Here are just a few figures that illustrate how the Indian Ocean region truly 'is at the centre of global commerce: nearly 100,000 ships transit the ocean annually, with 30% of global containerised cargo, while 42% of global crude oil, product and distillate is lifted from and within the region.'<sup>2</sup>

Since the turn of the last century, the Indian Ocean region has also become a key geopolitical battleground in the steadily intensifying systemic rivalry between autocracies and democracies. Here as elsewhere the battle for supremacy is being waged with uncompromising means. In the maritime domain, this involves naval competition, controlling sea routes, dominance over strategic chokepoints, securing influence through port infrastructure investments, expanding exclusive economic zones, exploiting maritime resources, and shaping maritime governance norms in ways that reflect national interests.

The primary objective of the axis of autocracies – driven by China, Russia, Iran, and North Korea – is to dismantle the Pax Americana and overturn the rules-based international order. Chinese President Xi Jinping made this unmistakably clear when, during his visit to Moscow in March 2023, he bid farewell to his Russian counterpart, Vladimir Putin, with the words: 'Right now there are changes – the likes of which we haven't seen for 100 years – and we are the ones driving these changes together.'<sup>3</sup> To achieve these changes, these states employ a combination of hybrid warfare tactics and conventional military means. While their proclaimed goal is to establish a multipolar world order, this vision in practice translates into a global division of exclusive spheres of influence. For the Communist Party of China, however, such multipolarity is merely a transitional phase on the path towards a Sino-centric world order. There is no doubt that autocratic regimes have increasingly gained influence in many parts of the world and expanded their position of power in recent years. But how extensive is the current geostrategic footprint of the axis of autocracies in the Indian Ocean region from a maritime perspective?

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<sup>1</sup>The other three primary maritime chokepoints are the Panama Canal, the Strait of Gibraltar, and the Turkish Straits. Cf. United Nations Conference on Trade and Development. 2024. Review of maritime transport 2024: Navigating maritime chokepoints. United Nations Publications: Geneva, p. 19 ([https://unctad.org/system/files/official-document/rmt2024\\_en.pdf](https://unctad.org/system/files/official-document/rmt2024_en.pdf)).

<sup>2</sup>Talmiz Ahmad. Indian Ocean: By the numbers. Frontline, 7 May 2024 (<https://frontline.thehindu.com/world-affairs/indian-ocean-region-by-the-numbers-vital-hub-for-global-commerce-strategic-chokepoints-vast-oil-reserves/article67891133.ece>).

<sup>3</sup>Xi Jinping, quoted in: China's Xi tells Putin of 'changes not seen for 100 years'. Al Jazeera, 22 March 2023 (<https://www.aljazeera.com/news/2023/3/22/xi-tells-putin-of-changes-not-seen-for-100>).



The People's Republic of China has effectively maintained a permanent naval presence in the Indian Ocean since December 2008, initially through its anti-piracy naval deployment in the Horn of Africa, and since August 2017 through the establishment of its first overseas military base in Djibouti.<sup>4</sup> This base, strategically located near the Bab el-Mandeb Strait, is capable of accommodating large navy vessels including aircraft carriers. It serves as a logistical hub for Chinese naval operations, enabling sustained deployments and power projection in the region.<sup>5</sup> In addition, for nearly three decades, China has pursued a 'String of Pearls' strategy, building a network of ports and infrastructure projects across the South China Sea and Indian Ocean, including Gwadar in Pakistan, Hambantota in Sri Lanka, and Kyaukpyu in Myanmar, to expand its logistical and naval footprint across the region. Just one example to illustrate the extent: in late 2022, the Chinese Ambassador to Nigeria acknowledged that China 'had built 100 seaports across Africa in the past two decades.'<sup>6</sup> Many of them are located on the coast of the Indian Ocean and are capable of accommodating naval units.<sup>7</sup> Since 2013, these projects have been advanced within the framework of the Maritime Silk Road, the maritime arm of China's Belt and Road Initiative (BRI), widely regarded a neo-imperial tool of global geopolitical influence. While officially commercial, these sites serve clear dual-use functions. In some cases, BRI projects are also combined with significant arms cooperation, including in the naval sector, such as the joint production programmes for frigates and conventional submarines between China and Pakistan.<sup>8</sup> Through its strategic investments in overseas ports, China is enhancing its ability to project military power, secure sea lanes, provide support points for naval operations and

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<sup>4</sup> Darshana M. Baruah. China in the Indian Ocean: A stronger Indo-Pacific presence. International Institute for Strategic Studies, 22 May 2025 (<https://www.iiss.org/online-analysis/charting-china/2025/05/china-in-the-indian-ocean-a-stronger-indo-pacific-presence>).

<sup>5</sup> Lauren Ploch Blanchard. China's Engagement in Djibouti. U.S. Congressional Research Service, June 2025 (<https://www.congress.gov/crs-product/IF11304>).

<sup>6</sup> Monika Chansoria. Beijing's Naval Expansion in Africa: 100 Seaports in 20 Years. Japan Forward, 2 July 2024 (<https://japan-forward.com/beijing-naval-expansion-africa-100-seaports-monika-chansoria>).

<sup>7</sup> The Council on Foreign Relations has a useful tracker of China's strategic overseas port investments: <https://www.cfr.org/tracker/china-overseas-ports>.

<sup>8</sup> Namita Barthwal. 2024. China-Pakistan Military Cooperation: Analysis of the Alliance and Its Implication on South Asia. Centre for Land Warfare Studies, Manekshaw Paper no. 103 (<https://claws.co.in/wp-content/uploads/2025/01/Web-MP-103-China-Pakistan-Military-Cooperation-21-8-24-2.pdf>).

surveillance activities, and challenge the strategic dominance of other naval powers in the region, particularly the Indian and U.S. Navy. This is also important in the context of a potential war over Taiwan, as the land and sea corridors created as part of the BRI, in which these overseas ports play an important role, are intended to help China bypass the combat zones in the Pacific and thus maintain the supply of vital goods to its population and its war machine.

Russia has also noticeably increased its naval presence in the Indian Ocean in recent years. Apart from setbacks in the Black Sea, its navy has so far emerged largely unscathed from the war in Ukraine and continues to pose a credible threat. Since November 2023, the Russian Pacific Fleet has conducted two joint naval exercises with Myanmar in the Andaman Sea. In spring 2025, it conducted the first joint exercises with the Pakistani and Bangladeshi navies. Russia has held regular bilateral exercises with India, in particular the biennial INDRA Navy series since 2003, and participated in multilateral drills alongside China and Iran in the Arabian Sea since 2019. Furthermore, Russia is pursuing the establishment of a naval base in Port Sudan on the Red Sea, which would provide a strategic foothold for operations in the Indian Ocean and enhance its ability to project power across the region. Russia's arms cooperation with countries in the Indian Ocean region is also noteworthy. These often date back to the Soviet era and include notable naval projects, such as the construction of the Indian Talwar-class frigates.<sup>9</sup>

Iran is undoubtedly the weakest link in the axis of autocracies, the only non-nuclear power, with a navy that is relatively limited in capability and primarily focuses on asymmetric warfare strategies. Nevertheless, Iran and its regional proxies, especially the Houthis in Yemen, and increasingly also Al-Shabab in Somalia, have emerged in recent years as the greatest threat to international shipping in the northern Indian Ocean. Due to its geographical location, Iran controls the Strait of

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<sup>9</sup> Gul-i-Ayesha Bhatti. Moscow's Indian Ocean Strategy. *The Nation*, 15 February 2024 (<https://www.nation.com.pk/15-Feb-2024/moscow-s-indian-ocean-strategy>); Ryan Chan. Map Shows Putin's Warships in Asia Amid War in Europe. *Newsweek*, 21 April 2025 (<https://www.newsweek.com/russia-news-navy-deployment-asia-pacific-vladimir-putin-ukraine-war-2062066>); Sankalp Gurjar. Russia Returns to the Indian Ocean: Exploring the Expanding Strategic Presence. *India Quarterly*, vol. 78 (2022), no. 3, p. 413-428 (<https://doi.org/10.1177/09749284221108256>).

Hormuz, 'the world's most important oil chokepoint.'<sup>10</sup> It was last effectively shut down during the 1980s Iran-Iraq 'Tanker War.' Iran threatened to close it again during the 2025 Israel-Iran War. This would have had significant repercussions for the global economy. About one-fifth of global oil shipments pass through the strait – an even larger share of oil transported by sea – and a significant amount of liquefied natural gas (LNG). However, and this is one of Iran's biggest dilemmas, most of that oil is destined for China, its partner in the autocratic axis, which Tehran cannot afford to alienate. Even if Iran were to close the strait only to vessels from countries hostile or unaffiliated with the mullah regime, it would risk provoking military intervention by the Arab Gulf states and Western powers, making such a scenario highly unlikely in the future.<sup>11</sup>

The extent to which a primary maritime chokepoint can be disrupted through asymmetric means has been clearly illustrated by the Houthis' sustained attacks on merchant vessels in the Bab el-Mandeb Strait and Red Sea since November 2023, rendering this vital shipping route largely unusable for international trade. Notably, vessels owned or operated by Chinese, Russian, or Iranian entities have been spared from these attacks, except for a few misfires. The intended damage lies mainly with Western shipowners. They have higher costs and prolonged delivery times in the movement of goods between Asia and Europe given that their ships are effectively forced to take the much longer but safe sea route around the Cape of Good Hope. From the perspective of the Houthis and their main sponsor, Iran, the disruptive approach works very well, not least because Western navies have so far failed to regain control and ensure safe passage for Western merchant vessels through the disputed sea area.<sup>12</sup> However, if the Iranian mullah regime falls, this could put the Houthis in serious trouble as they would lose their main arms supplier.

<sup>10</sup> The Strait of Hormuz is the world's most important oil transit chokepoint. U.S. Energy Information Administration, 21 November 2023 (<https://www.eia.gov/todayinenergy/detail.php>).

<sup>11</sup> Howard Altman. Could Iran Carry Out Its Threat To Shut Down The Strait Of Hormuz? The War Zone, 14 June 2025 (<https://www.twz.com/news-features/could-iran-carry-out-its-threat-to-shut-the-strait-of-hormuz>).

<sup>12</sup> Fatima Abo Alasrar. How China turned the Red Sea into a strategic trap for the US. Atlantic Council, 5 May 2025 (<https://www.atlanticcouncil.org/blogs/menasource/how-china-turned-the-red-sea-into-a-strategic-trap-for-the-us>); Tuvia Gering, Jason M. Brodsky. China is supporting the Houthis: Here's how the Trump administration can respond. Atlantic Council, 14 January 2025 (<https://www.atlanticcouncil.org/blogs/new-atlanticist/china-is-supporting-the-houthis-heres-how-the-trump-administration-can-respond>); Kali Robinson. Iran's Support of the Houthis: What to Know. Council on Foreign Relations, 24 March 2025 (<https://www.cfr.org/in-brief/irans-support-houthis-what-know>).

## European And U.S. Naval Engagement in the Indian Ocean

How is the global West, especially Europe, responding to the growing naval challenges in the Indian Ocean? To what extent do Western actors possess both the means and the political resolve to counter the efforts of autocratic regimes seeking to undermine the rules-based international order in this strategically vital region?

### *United States of America*

The United States maintains a strong naval presence in the Indo-Pacific, but with a particular focus on the Western Pacific to deter China and respond to the threats and challenges it poses in the region. 'Beijing is making credible preparations to potentially use military force to shift the balance of power in the Indo-Pacific,' warned U.S. Secretary of Defense Pete Hegseth at the Shangri-La Dialogue in Singapore on 31 May 2025. He emphasised that 'we [the United States] do not seek conflict with communist China. [...] But we will not be pushed out of this critical region and we will not let our allies and partners be subordinated and intimidated.'<sup>13</sup> While the U.S. Navy's operational focus in the Indo-Pacific is centred on the Western Pacific, it conducts frequent patrols and exercises in the Indian Ocean with allies and partners such as India, Australia, and Japan. These four countries also form the Quadrilateral Security Dialogue (Quad), a strategic forum aimed at promoting a free and open Indo-Pacific through diplomatic coordination, military exercises, and enhanced maritime cooperation. For the second Trump administration, the Quad 'is a key fixture in the U.S. Indo-Pacific Strategy'<sup>14</sup>.

The U.S. 5th Fleet is headquartered in Bahrain in the Persian Gulf. Its area of responsibility includes much of the Indian Ocean, particularly the Arabian Sea and the waters around the Horn of Africa. The fleet routinely deploys carrier strike groups, submarines, and logistics vessels through the Indian Ocean. Diego Garcia in the British Indian Ocean Territory is the most important U.S. naval and air force base

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<sup>13</sup> Hegseth Speaks in Singapore. U.S. Department of Defense, 31 May 2025, (<https://www.defense.gov/Multimedia/Videos/videoId/964738>).

<sup>14</sup> Jonah Bock, Kaitlyn Flynn. A Trump administration playbook for the Pacific. Pacific Forum, 9 May 2025 (<https://pacforum.org/publications/pacnet-37-a-trump-administration-playbook-for-the-pacific>).

in the region. It is a joint UK–U.S. base, but the United States operates it extensively. Situated in the central Indian Ocean, Diego Garcia allows the United States to project power across the Middle East, East Africa, South Asia, and Southeast Asia. It has deep-water port facilities, airfields, and prepositioned military supplies, supporting air operations, logistics, surveillance, and naval deployments. In addition, the United States operates a naval expeditionary base in Djibouti, its largest military base on the African continent, as well as several other military bases and sites in the region, often together with allies and partners.<sup>15</sup>

Since 9/11, U.S. Navy missions in the Indian Ocean region have primarily focused on deterring and disrupting non-state actors, with an emphasis on counter-piracy and counter-terrorism operations. These include deployments as part of Operation Enduring Freedom – Horn of Africa (2001–2014), the four Combined Task Forces 150 to 153 (established between 2002 and 2022), NATO’s Operation Ocean Shield (2009–2016), and Operation Inherent Resolve, which has been ongoing since 2014. Most recently, in December 2023, the United States launched Operation Prosperity Guardian, a U.S.-led multinational task force intended to neutralise the Houthi threat to Red Sea shipping lanes. This objective remains unfulfilled even after Operation Rough Rider, a two-month campaign of intensive airstrikes against the Iranian proxy in the spring of 2025.<sup>16</sup> In fact, the situation may even worsen, as recent developments suggest that growing ties between the Yemeni Houthis and Somali al-Shabaab are exacerbating security threats in the Red Sea region.<sup>17</sup>

## **Australia**

The British Commonwealth nation of Australia has a significant coastline in the Indian Ocean, stretching along its west and northwest coasts. It also includes Christmas Island and the Cocos (Keeling) Islands atolls, both situated south-west of the Indonesian archipelago. Due to its geographical location, the Indian Ocean region

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<sup>15</sup> Luke A. Nicastro, Andrew Tilghman. U.S. Overseas Basing: Background and Issues for Congress. U.S. Congressional Research Service, 10 July 2024 (<https://www.congress.gov/crs-product/R48123>).

<sup>16</sup> Peter Eavis. Red Sea Passage Remains a No-Go for Shipping Despite U.S. Action. New York Times, 5 June 2025 (<https://www.nytimes.com/2025/06/05/business/red-sea-houthis-shipping.html>).

<sup>17</sup> Expanding Al Shabaab–Houthi Ties Escalate Security Threats to Red Sea Region. Africa Center for Strategic Studies, 28 May 2025 (<https://africacenter.org/spotlight/al-shabaab-houthi-security-red-sea>).

'is essential to Australia's security and prosperity,'<sup>18</sup> as recently emphasised by the Australian Department of Foreign Affairs and Trade. The country's 2024 National Security Strategy outlines the following priorities for the area: 'India is a top-tier security partner for Australia' and 'the Northeast Indian Ocean is central to Australia's security and sea lines of communication.'<sup>19</sup>

The Royal Australian Navy plays an active role in the Indian Ocean, with a strong focus on maritime security, regional stability, and strategic partnerships. Australia underlines its commitment to the Indian Ocean region through sustained naval operations, regular participation in multinational exercises such as Cutlass Express and Malabar, and the growing strategic importance of its partnerships with India and other partners in the region. In response to China's growing and increasingly menacing naval presence in the Indian Ocean, Australia is expanding its military base in the Cocos Islands as well as its main Indian Ocean naval base Stirling near Perth.<sup>20</sup>

Australia plays a central role in both AUKUS and the Quad, two key strategic partnerships shaping the Indo-Pacific security landscape. Through AUKUS, Australia collaborates closely with the United States and the United Kingdom to enhance advanced defense capabilities, including nuclear-powered submarines, cyber technologies, and artificial intelligence. Simultaneously, its engagement in the Quad – alongside the United States, India, and Japan – focuses on 'supporting an open, stable and prosperous Indo-Pacific that is inclusive and resilient.'<sup>21</sup> Together, these frameworks underscore Australia's commitment to regional stability, deterrence, and multilateral cooperation.

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<sup>18</sup> Australia and the Indian Ocean region. Australian Department of Foreign Affairs and Trade, June 2025 (<https://www.dfat.gov.au/international-relations/regional-architecture/indian-ocean/Pages/indian-ocean-region>).

<sup>19</sup> National Defence Strategy. Australian Department of Defence, Canberra 2024, pp. 49-50 ([https://www.globalsecurity.org/military/library/policy/int/2024-australia-national-defence-strategy\\_20240417.pdf](https://www.globalsecurity.org/military/library/policy/int/2024-australia-national-defence-strategy_20240417.pdf)).

<sup>20</sup> Felix K. Chang. Australia's and India's New Military Bases: Responses to China's Naval Presence in the Indian Ocean. Foreign Policy Research Institute, 6 November 2023 (<https://www.fpri.org/article/2023/11/australia-and-indias-new-military-bases-responses-to-chinas-naval-presence-in-the-indian-ocean>).

<sup>21</sup> The Quad. Australian Department of Foreign Affairs and Trade, June 2025 (<https://www.dfat.gov.au/international-relations/regional-architecture/quad>).

## ***United Kingdom***

Of the European sea powers, two have a particular interest in the Indian Ocean region because they still own territories there: the United Kingdom and France. The United Kingdom has had a permanent naval presence in the Indian Ocean since the establishment of the East Indies Station in 1744. For about two centuries, 'the Indian Ocean became a 'British lake' by virtue of Britain's expanding colonial presence, its naval strength, and the commerce that it stood to protect.'<sup>22</sup> However, during the decolonisation process in the second half of the 20th century, the Royal Navy gradually lost all of its naval bases in the region. The last remaining British possession there – the British Indian Ocean Territory, which comprises the Chagos Archipelago with over 1,000 small islands strategically located in the central Indian Ocean south of the Maldives – is set to be transferred to Mauritius once both countries ratify the agreement reached in May 2025. One island in the archipelago is explicitly excluded: Diego Garcia. Home to the joint UK-U.S. military base, Diego Garcia will remain under British control and is to be leased to the United Kingdom for a period of 99 years, with an option to extend the lease by an additional 40 years.<sup>23</sup> Moreover, two British naval bases have been established on the shores of the Indian Ocean in recent years: the UK Naval Support Facility in Bahrain, opened in 2018, and the UK Joint Logistics Support Base at Duqm Port in Oman, operational since 2019.

Like all Western European countries, the United Kingdom reaped a peace dividend after the end of the Cold War and significantly reduced its armed forces, with the size of the Royal Navy falling by almost 60% until the turnaround in 2015.<sup>24</sup> This inevitably had an impact on the Royal Navy's global presence and global

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<sup>22</sup> Ashley Jackson. *The Royal Navy and the Indian Ocean Region since 1945*. The *RUSI Journal*, vol. 151 (2006), no. 6, pp. 78–82, here p. 78 (<https://doi.org/10.1080/03071840608522863>); see also: John D. Grainger. 2022. *The British Navy in Eastern Waters: The Indian and Pacific Oceans*. The Boydell Press: Woodbridge.

<sup>23</sup> Muvija M., Michael Holden. UK signs Chagos deal with Mauritius to seal future of US-UK air base. Reuters, 22 May 2025 (<https://www.reuters.com/world/uk/uk-set-sign-deal-ceding-sovereignty-chagos-islands-mauritius-2025-05-22>).

<sup>24</sup> Jeremy Stöhs. 2018. *The Decline of European Naval Forces. Challenges to Sea Power in an Age of Fiscal Austerity and Political Uncertainty*. Naval Institute Press: Annapolis, pp. 37–39.

power projection capabilities. Nevertheless, it has regularly contributed to several multilateral anti-piracy and anti-terror operations at the Horn of Africa and in the Red Sea since 9/11. In addition, the United Kingdom has had a permanent naval mission in the Persian Gulf since 1980: Operation Kipion, which was formalised under its current name in 2011 and is the 'UK's effort to maintain peace and stability in the Gulf region'<sup>25</sup> through the continuous deployment of Royal Navy and Royal Fleet Auxiliary vessels.

Aside from that, the Royal Navy has also regularly conducted joint exercises with allied navies in the region for decades to enhance interoperability and regional security. Most recently, Operation Highmast marked a significant deployment of the Royal Navy, including an aircraft carrier, for joint exercises and port visits with partners in the Eastern Hemisphere, including in the Indian Ocean region. A particular focus is on cooperation with India: Four years ago, the United Kingdom and India entered into a comprehensive strategic partnership under the 'UK/India 2030 Roadmap,' which aims to deepen defence and maritime security cooperation in the Indo-Pacific. This includes joint initiatives in the western Indian Ocean and enhanced cooperation with ASEAN. As outlined in the 2022 National Strategy for Maritime Security, the United Kingdom has joined the Indian Indo-Pacific Initiative as the lead partner for the maritime security pillar.<sup>26</sup>

### ***European Union and EU Member States***

Since 2008, the European Union has expanded its naval presence in the Indian Ocean region through several missions and initiatives aimed at enhancing maritime security and promoting the rules-based international order. Operation ATALANTA (EU NAVFOR Somalia), launched in 2008, was the EU's first naval mission, initially focused on countering piracy off the Somali coast. Its mandate has since evolved to

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<sup>25</sup> Operation Kipion: What is the Royal Navy's mission in the Middle East? British Forces Broadcasting Service, 30 November 2023 (<https://www.forcesnews.com/services/navy/operation-kipion-what-royal-navys-mission-middle-east>).

<sup>26</sup> National Strategy for Maritime Security. Her Majesty's Government, August 2022 (<https://assets.publishing.service.gov.uk/media/630880c5e90e0729d9ab15fc/national-strategy-for-maritime-security-web-version.pdf>); Cathrine West. The UK's Indo-Pacific policy: FCDO Minister's speech to the IISS. Foreign, Commonwealth & Development Office, 25 November 2024 (<https://www.gov.uk/government/speeches/the-uks-indo-pacific-policy-fcdo-ministers-speech-to-the-iiss>).



include joint exercises with Indo-Pacific partners, maritime domain awareness, and capacity-building, with operations extended until 2027 due to the renewed threat from Al-Shabaab.<sup>27</sup> The EU also launched the Coordinated Maritime Presences (CMP) initiative in 2021 to increase visibility and coordination of Member States' naval deployments. The CMP Northwestern Indian Ocean promotes international law, freedom of navigation, and support for coastal states' maritime capacities, with Operation ATALANTA operating within its framework. In response to rising threats in the Red Sea, the EU launched Operation ASPIDES in February 2024 to defend commercial shipping from Houthi attacks. The focus is on protection rather than offensive operations, deliberately distinguishing it from the U.S.-led Operation Prosperity Guardian. Although Operation ASPIDES is still ongoing, it has essentially failed.<sup>28</sup> Former U.S. National Security Advisor Michael Waltz put it straight by stating: 'European navies do not have the capability to defend against the types of sophisticated, antiship, cruise missiles, and drones the Houthis are now using.'<sup>29</sup>

In addition to these EU-led missions and contributions to other multilateral missions in the region like NATO's Operation Ocean Shield (2009–2016), EU Member States such as France, Germany, Italy, Spain, and the Netherlands have contributed to Europe's growing maritime presence in the Indo-Pacific region through regular naval deployments, joint exercises, and freedom of navigation operations in recent years. They primarily focus on the Western Pacific, but increasingly also on the Indian Ocean. The deployments are in line with the EU's 2014 Maritime Security Strategy and its Action Plan, last updated in 2023, the EU's 2021 Strategy for Cooperation in the Indo-Pacific, France's Indo-Pacific Strategy issued in 2019 and updated in 2022, as well as the Indo-Pacific Guidelines published by Germany and the Netherlands in 2020.<sup>30</sup> These strategies and guidelines all recognise the Indian Ocean as a vital region for global trade and security.

<sup>27</sup> See EU Naval Force Operation Atalanta's official website: <https://eunavfor.eu/mission>.

<sup>28</sup> Missions and Operations: Working for a stable world and a safer Europe. European External Action Service, 30 January 2025 ([https://www.eeas.europa.eu/eeas/missions-and-operations\\_en#87694](https://www.eeas.europa.eu/eeas/missions-and-operations_en#87694)).

<sup>29</sup> Michael Waltz, quoted in: Jeffrey Goldberg, Shane Harris. Here Are the Attack Plans That Trump's Advisers Shared on Signal. *The Atlantic*, 26 March 2025 (<https://www.theatlantic.com/politics/archive/2025/03/signal-group-chat-attack-plans-hegseth-goldberg/682176>).

<sup>30</sup> For an overview of European strategic approaches to the Indo-Pacific, see: Konrad Adenauer Foundation. *European Strategic Approaches to the Indo-Pacific. Panorama*, vol. 7 (2021), no. 1 (<https://www.kas.de/documents/288143/16920728/Panorama+European+Strategic+Approaches+to+the+Indo-Pacific.pdf>).

Also worth mentioning is the EU's engagement in several dialogue platforms in the Indian Ocean region where maritime security plays an important role: the India-EU Maritime Security Dialogue launched in 2021, and the recently launched EU-Mauritius and EU-Seychelles Partnership Dialogues. Since January 2024, the EU has also participated as a dialogue partner in the Indian Ocean Rim Association (IORA), which 'provides [it with] an opportunity to enhance [regional] maritime safety and security cooperation.'<sup>31</sup>

Among all EU countries, France has the largest presence in the Indian Ocean – a legacy of its colonial past. It maintains several territories in the region, including the overseas departments of Réunion and Mayotte, as well as the Scattered Islands (îles Éparses), and parts of the French Southern and Antarctic Lands such as the Kerguelen and Crozet Islands. These territories 'make France a fully-fledged Indian Ocean State'<sup>32</sup> and a key power in the region with a vast exclusive economic zone (EEZ). Actually, 'the Indian Ocean is today the main centre of France's action in the Indo-Pacific, as it is the area where France has the greatest number of levers of influence and power projection capabilities.'<sup>33</sup> France maintains a permanent military presence of around 2,100 personnel in the Indian Ocean, primarily based in Réunion, Mayotte, and the Scattered Islands. Key assets include Floréal-class frigates, patrol and support ships, maritime patrol aircraft, and a detachment of the Foreign Legion.<sup>34</sup> This force, commanded by the South Indian Ocean Zone Armed Forces (FAZSOI), secures France's vast EEZ and supports regional stability from key bases such as Port des Galets in Réunion and the 5th Foreign Regiment<sup>35</sup> post in

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<sup>31</sup> Enhancing Indo-Pacific Connectivity: EU's Entry into IORA Dialogue. The European Institute for International Relations, 16 April 2024 (<https://www.eiir.eu/international-relations/enhancing-indo-pacific-connectivity-eus-entry-into-iora-dialogue>).

<sup>32</sup> France in the south-west Indian Ocean. Ministère de l'Europe et des Affaires étrangères, July 2024 (<https://www.diplomatie.gouv.fr/en/country-files/regional-strategies/indo-pacific/the-indo-pacific-a-priority-for-france/france-in-the-south-west-indian-ocean>).

<sup>33</sup> Marc Semo. Comment la France renforce sa défense en Indopacifique. *Esprit défense*, vol. 4 (2024), no. 10, p. 34-41, here p. 37 (<https://www.defense.gouv.fr/sites/default/files/ministere-armees/esprit-defense-numero-10-hiver-2024.pdf>). Translated from French.

<sup>34</sup> Alistair Cole, Jean-Pierre Cabestan. The Ties That Bind: Protection and Projection in France's Indian Ocean Islands of Mayotte and Réunion. *Geopolitics*, vol. 29 (2024), no. 5, pp. 1971-1995 (<https://doi.org/10.1080/14650045.2023.2294794>).

<sup>35</sup> The Foreign Legion Detachment, which has been stationed in Dzaoudzi, Mayotte, since 1976 was transformed into the 5th Foreign Regiment in autumn 2024. Cf. 5th Foreign Regiment. Foreign Legion Info, June 2025 (<https://foreignlegion.info/units/5th-foreign-regiment>).

Mayotte. France also maintains a permanent presence in the northern Indian Ocean through two forward-deployed forces: the French Forces in the United Arab Emirates (FFEAU) with about 850 soldiers and the French Forces in Djibouti (FFDj) with around 1,500 personnel.<sup>36</sup> Additionally, France regularly deploys naval forces, including its carrier strike group, to the Indian Ocean. It also regularly participates in regional multinational naval exercises, such as the annual bilateral exercise Varuna with India and the French-led multinational exercise La Perouse, which involves several nations in the Indo-Pacific region.

France also plays a proactive role in enhancing security and stability in the Indian Ocean through strong institutional cooperation and regional partnerships, notably as a member of both the Indian Ocean Commission and the Indian Ocean Rim Association. In addition, France is deeply engaged in strengthening the regional maritime security architecture. It focuses on 'implementing bilateral and trilateral cooperation',<sup>37</sup> including its support for the Maritime Information Fusion Centers in India and Madagascar and the Regional Center for Maritime Studies in Sri Lanka. France further underscored its commitment when it assumed the chairmanship of the Indian Ocean Naval Symposium from 2021 to 2023, 'the only forum bringing together the 24 navies of the Indian Ocean'.<sup>38</sup>

## Europe's Naval Footprint in the Indian Ocean Remains a Fragile Commitment

What is the strategic significance of Europe's naval engagement in the Indian Ocean? Undoubtedly, it reflects a commitment to safeguarding maritime security and promoting a stable Indo-Pacific. Key mission objectives include ensuring freedom of navigation, combating piracy and maritime crime, enhancing maritime domain awareness, and strengthening partnerships with regional powers. Through their

<sup>36</sup> Olivia Penichou, Alexandra Hennet-Gruet. 2024 Defense Key Figures. Ministère des armées, Paris 2024, p. 20 (<https://www.defense.gouv.fr/sites/default/files/ministere-armees/Chiffres%20clés%20de%20la%20Défense%20-%202024%20UK.pdf>).

<sup>37</sup> France's Indo-Pacific Strategy. French Ministry for Europe and Foreign Affairs, Paris 2022, p. 51 ([https://www.diplomatie.gouv.fr/IMG/pdf/en\\_dcp\\_a4\\_indopacifique\\_022022\\_v1-4\\_web\\_cle878143.pdf](https://www.diplomatie.gouv.fr/IMG/pdf/en_dcp_a4_indopacifique_022022_v1-4_web_cle878143.pdf)).

<sup>38</sup> Ibid.

naval engagement in the Indian Ocean, European navies – particularly the French Navy – contribute to global maritime security efforts, strengthen the rules-based international order, support regional capacity-building, and engage in strategic balancing through deployments and joint exercises.

Nonetheless, it is important to acknowledge that European naval engagement in the Indian Ocean remains constrained by significant challenges, primarily the scarcity of suitable naval assets available for deployment. Since the end of the Cold War, European navies have reaped a peace dividend. This led to a significant reduction in their armed forces, including their fleets, and thus their power projection capabilities. Although most European navies have passed the lowest point, this does not necessarily mean they have more navy vessels available for out-of-area deployments. The recent shift in focus among European NATO states toward national and alliance defense – driven by Russia’s war of aggression against Ukraine and the growing Russian threat to NATO – is increasingly absorbing military and naval capacities that are no longer available for missions in other parts of the world.

Furthermore, the current lack of strategic unity and political will among the European sea powers to robustly defend the rules-based international order in the Indian Ocean – together with like-minded regional and international partners – makes it difficult to develop a coherent long-term strategy to effectively counter the sinister imperial ambitions of China and other authoritarian powers in the region. The typical European reactive and defensive posture at sea, coupled with the dependence on the U.S. Navy to conduct comprehensive combat operations, cannot be considered a sustainable strategic approach. The shortage of naval resources and logistical challenges in sustaining distant operations further limit the scope and duration of European naval deployments. Extensive legal and mandate-related restrictions limit operational flexibility, while evolving asymmetric threats, new technologies, and novel operational concepts demand capabilities that are not always readily accessible to European navies.

Overcoming these challenges and shortcomings is possible. However, it requires strategic foresight, courage, political will, and the provision of the necessary naval capabilities from European policymakers. They have already taken the first steps in the right direction, including significantly increasing defense spending and boosting the European defense industry. Given the Russian threat to NATO’s eastern and

northern flanks, it is essential for the Europeans not to make the mistake of focusing entirely on this challenge. Instead, in close coordination with their allies across the global West, they must also contribute to safeguarding the rules-based international order in other critical regions of the world with capable blue water navies and other military assets. The Indian Ocean in particular holds significant strategic importance in this context.

## Conclusion

We should not be under any illusions: the Indian Ocean region is one of the key battlegrounds in the global systemic rivalry between autocracies and democracies. Therefore, the European sea powers should step up their naval presence in the Indian Ocean well beyond the immediate conflict zones. This aligns with their strategic interest in supporting regional and international partners in safeguarding maritime trade routes between Asia and Europe and upholding the rules-based international order, which is increasingly challenged by China, Russia, and other authoritarian regimes.

In addition to a larger and more robust naval presence, the EU and its Member States should continue to deepen cooperation and capacity building with partners in the Indian Ocean region to curb the negative influence of the axis of autocracies. This would also play an important role in pushing back against China's geopolitical encirclement of the West and its ambitions to establish a dominant Eurasian bloc. Non-alignment has deep historical roots in the Indian Ocean region, particularly in South Asia. However, this approach is increasingly under pressure as the global systemic rivalry between autocracies and democracies intensifies. Indian Ocean Rim countries will soon be forced to choose: stand with the democratic world or align with the axis of autocracies. A stronger strategic engagement by the EU and its Member States, particularly in the maritime domain, would send a clear and reassuring message to like-minded partners in the region: that Europe is committed to supporting their sovereignty and resilience in the face of China's hegemonic aspirations.

A broader European engagement in the region, particularly in the maritime domain, is welcomed by many like-minded countries along the Indian Ocean Rim. This sentiment was echoed by numerous panelists at an Indo-Pacific security conference I attended in Colombo, Sri Lanka, in mid-May 2025.<sup>39</sup> The conference was held just days after the latest India-Pakistan limited war, where China reportedly backed Pakistan with real-time electronic warfare and intelligence support for the first time.<sup>40</sup> This intervention by China was a calculated move and part of the country's long-term strategic preparations for a possible conflict over Taiwan. 'China has spent the last five decades investing in building nuclear proxy forces in Pakistan, North Korea and Iran to create nuclear crises to divert Washington's attention away from the Taiwan Strait,' said Richard Fisher of the International Assessment and Strategy Center. 'China's investment in Russia's war in Ukraine is in the same vein.'<sup>41</sup> This also applies to China's direct military support to Pakistan in its recent military confrontation with India.

From an American perspective, China represents the primary long-term rival, whereas Russia and other autocratic regimes are largely regional powers. Accordingly, containing and countering China's imperial ambitions has been a growing priority for several consecutive U.S. governments. The second Trump administration's apparent attempt to draw Russia into the Western camp and align it against China is doomed to fail, as Putin ruthlessly pursues his own conflicting interests. Meanwhile, the severe damage inflicted on Iran's nuclear facilities during the recent Israel-Iran War, achieved with decisive American intervention, has sent a strong message of resolve to all autocratic regimes. For Europeans, these developments signal the need to take on greater responsibility for deterrence and defense within their own hemisphere.

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<sup>39</sup> The conference "Small, Middle and Island Nations in the Indo-Pacific: Between Competition, Cooperation, and Co-Existence?" was jointly organized by the Consortium of South Asian Think Tanks (COSATT), the Sri Lankan Institute of National Security Studies (INSS) and the Konrad Adenauer Foundation (KAS). Cf. Megha Sarmah. Maritime Security of Small, Middle and Island Nations: Between Competition, Cooperation and Co-Existence. Konrad-Adenauer-Stiftung, 28 May 2025 (<https://www.kas.de/en/web/politikdialog-asien/veranstaltungsberichte/detail/-/content/maritime-security-of-small-middle-and-island-nations-1>).

<sup>40</sup> Bonnie S. Glaser, Andrew Small. China's Role in the India-Pakistan Clash. German Marshall Fund of the United States, 10 June 2025 (<https://www.gmfus.org/news/chinas-role-india-pakistan-clash>).

<sup>41</sup> Richard Fisher, quoted in: Gordon G. Chang. Despite military purges, China's next war 'could be imminent' and spread fast. The Hill, 9 June 2025 (<https://thehill.com/opinion/international/5337657-china-turmoil-war-threat/amp>); see additionally: Heiko Herold. Zermürbung durch Mehrfrontendruck: Wie die Achse der Autokratien die westliche Allianz in die Knie zwingen will. SIRIUS, vol. 8 (2024), no. 2, pp. 159-183 (<https://doi.org/10.1515/sirius-2024-2006>).

This responsibility extends beyond the European continent – or more precisely, the European Peninsula – and its immediate surroundings. It also includes the neighbouring Middle East and Indian Ocean regions. Safeguarding Europe's strategic interests there is not Washington's sole responsibility. While Europeans are currently focusing, for good reason, primarily on countering the Russian threat along Europe's land and sea borders, they must face up to the fact that protecting core European interests requires a strong, capable and robust European naval presence in both the Atlantic and Indian Oceans, including all their marginal seas. Establishing and maintaining such a presence with manned and unmanned naval assets in close cooperation with regional and international partners is critical to ensuring control of the seas, providing strategic deterrence, projecting power, deterring adversaries, and strengthening the rules-based international order. Furthermore, it would allow the U.S. Navy to focus more on China and the Western Pacific, which would serve our common interests.

European policymakers must now move from rhetoric to action. It is no longer enough to simply acknowledge the strategic importance of the Indian Ocean. The EU and its Member States, in coordination with the United Kingdom, should rapidly develop and implement a comprehensive maritime strategy for the Indian Ocean, intensify joint naval exercises with regional partners, establish permanent rotational deployments, and invest in logistics hubs, forward operating bases, and active security cooperation with regional powers. Only through such concrete steps can Europe credibly demonstrate its commitment to safeguarding its interests and supporting its partners in the region.

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# SUBMARINE NETWORKS AND MARITIME SECURITY IN THE INDO PACIFIC: A STRATEGIC IMPERATIVE TO PROTECT THE INVISIBLE BACKBONE OF THE EU'S DIGITAL FUTURE

*Gianmarco Gabriele Marchionna*

## Introduction

The world's digital age rests on a physical foundation that lies far below the waterline. More than 97% of international data moves through a mesh of fibreoptic cables that now stretches for roughly 1.4 million kilometres across the seabed.<sup>1</sup> Nowhere is this invisible lattice more strategically exposed than in the Indo-Pacific, where great power rivalry, contested maritime geography and fast rising defence budgets converge. The European Union (EU) has become a pivotal stakeholder in that contest, not merely because of its commercial ties to Asia, but because its own economic security and political autonomy increasingly depend on unbroken, trustworthy data flows that transit the region.

Yet submarine cables remain a peripheral concern in most EU Indo-Pacific or maritime security documents. This Panorama Chapter argues that cable security must migrate from the margins to the mainstream of European strategic thinking. It sets out why Brussels and the Member States should treat these infrastructures as critical assets, and how they can work with like-minded partners to reduce risks that range from physical sabotage and deep sea mining damage to covert data interception and legal coercion.

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<sup>1</sup> TeleGeography, "Submarine Cable Map & Industry Overview," 2024, <https://www.submarinecablemap.com> (accessed 9 May 2025).

## 1. Strategic Substructures: Submarine Cables as Digital Chokepoints in the Indo Pacific

Maritime historians remind us that mastery of the seabed has long translated into strategic advantage: in the 19th century control of the undersea telegraph network shaped both military outcomes and global information flows.<sup>2</sup> Today a comparable reality is unfolding across the Indo Pacific, where the vast majority of trunk cables squeeze through a handful of narrow passages – the Strait of Malacca, South China Sea, Luzon Strait and Gulf of Aden – that are politically contested, congested and difficult to police. A deliberate cut in any one of these corridors could slow global Internet traffic by double-digit percentages and isolate entire island economies from the cloud for days.<sup>3</sup>

Europe's vulnerability is compounded by the ownership profile of those lines. Four U.S. technology giants and three state-backed Chinese carriers now finance or operate more than two thirds of the capacity that traverses the region, while only a small cadre of European firms – notably Orange Marine and Alcatel Submarine Networks – still possesses the end-to end capability to lay or repair cables east of Suez.<sup>4,5</sup> A geopolitical flareup that restricted European access to these foreign controlled systems would reverberate through financial markets, cloud services and high-tech manufacturing across the Union.

The resulting exposure is not hypothetical. Empirical data reveals that 60% of ocean-generated wealth concentrates within merely 100 corporations – the Ocean 100 – intensifying dependency on limited private entities and heightening governance vulnerabilities for maritime infrastructure.<sup>6</sup> The disparity between cost-

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<sup>2</sup> Euan Graham, "Undersea Cable Control: The Information Dimension," Lowy Institute Interpreter, 24 April 2025, <https://www.lowyinstitute.org/the-interpreter/undersea-cable-control-information-dimension> (accessed 9 May 2025).

<sup>3</sup> Tim Fish, "To Protect Undersea Cables in the Middle East, US Needs a New Hub," Breaking Defense, 23 April 2025, <https://breakingdefense.com/2025/04/to-protect-undersea-cables-in-the-middle-east-us-needs-a-new-hub/> (accessed 9 May 2025).

<sup>4</sup> Alessandra Galassi and Gianmarco Gabriele Marchionna, "Submarine Networks: The Backbone of Digital Ecosystems Worldwide and Strategic Issues," LUISS School of Government Working Paper 3 (2024): 11–12.

<sup>5</sup> Center for Strategic and International Studies, *Submarine Cables and Global Infrastructure Vulnerability* (Washington, DC: CSIS, 2024), 17.

<sup>6</sup> Christian Bueger, "Africa's Maritime Security Relations and the Global Responsibility to Protect the Sea," CIMSEC, 18 June 2025. <https://cimsec.org/africas-maritime-security-relations-and-the-global-responsibility-to-protect-the-sea/> (accessed 18 June 2025).

bearers and profit-takers proves even more pronounced. Substantial maritime traffic traverses waters adjacent to Mauritius and Madagascar, subjecting these island nations to elevated environmental and security risks while yielding negligible economic returns. This exemplifies structural inequity wherein transit states assume disproportionate hazards – including potential accidents and ecological degradation – without corresponding participation in maritime commerce benefits. A recent report by the Center for Strategic and International Studies (CSIS) suggests that a 48 hour outage on the Asia-Europe main line could shave between €32 billion and €40 billion off EU gross domestic product (GDP).<sup>7</sup> Yet submarine cables remain a marginal item in most EU Indo-Pacific or maritime security strategies. Bridging that gap will require a blend of naval presence, regulatory leverage, public private consortia and specialised intelligence sharing – themes that the remainder of this paper develops in detail.

## 2. Emerging Threats: Hybrid War, Deep Tech and Legal Coercion

Submarine cables are increasingly exposed to a multilayered threat matrix that merges the physical, the cyber and the legal. What once looked like a low probability contingency – someone deliberately cutting a fibreoptic line – has evolved into a systematic instrument of statecraft. Two dynamics drive the shift.

First, contemporary hybrid-warfare doctrine treats critical infrastructure as a pressure point below the threshold of open conflict.<sup>8</sup> Since 2023, Taiwan's Matsu Islands have experienced four cable cuts attributed to Chinese-flagged vessels, temporarily blacking out local communications and forcing emergency satellite backup.<sup>9</sup> Similar patterns have appeared in the Baltic Sea, where a series of apparently coordinated incidents – ranging from the Estlink 2 power interconnector to the Baltic Connector gas pipeline – demonstrates how physical sabotage, cyber

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<sup>7</sup> Center for Strategic and International Studies, *Submarine Cables and Global Infrastructure Vulnerability*, 23.

<sup>8</sup> Glen E. Howard and Matthew Czekaj, eds., *Hybrid Threats and Modern Political Warfare: The Changing Architecture of Conflict* (Washington, DC: Jamestown Foundation, 2025), 42.

<sup>9</sup> Kathrin Hille, "Taiwan's Undersea Cables Cut in Suspected Chinese Sabotage," *Financial Times*, 8 March 2023, <https://www.ft.com/> (accessed 9 May 2025).

intrusion and legal grey zones reinforce one another.<sup>10</sup> Meanwhile, the *Ever Given* incident in the Suez Canal, which showed how a single disruption can trigger global supply-chain repercussions<sup>11</sup>, illustrates that surface chokepoint vulnerabilities can paralyse international commerce. Intentional submarine-cable severing would generate even more systemic effects.

Second, emerging technologies are lowering the cost of disruption. China's newly unveiled *Hai Leng* remotely operated vehicle can sever a 40 millimetre armour plated cable at depths of 4,000 metres, making attribution difficult and allowing the craft to relocate quickly for follow-on strikes.<sup>12</sup> AI enabled intrusion suites already map cable landing stations through open source vessel tracking data and compromised port authority networks.<sup>13</sup> ENISA's 2024 Threat Landscape warns that ransomware groups have shifted from mere data exfiltration to targeting the network operation centres that monitor undersea systems.<sup>14</sup>

The result is a spectrum of risk that extends well beyond deliberate attack. Deep sea mining ventures in the Pacific, still under regulated, threaten accidental damage through dredging operations and heavy lift moorings.<sup>15</sup> Meanwhile, authoritarian jurisdictions can exert legal coercion by manipulating permit procedures or by compelling operators to install interception devices at domestic landing sites.<sup>16</sup> For instance, China's Pacific Light Cable Network was blocked in 2020 because the

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<sup>10</sup> Offshore and Subsea Maritime Analysis, *The Baltic Lessons: Mediterranean Countries and Underwater Challenge* (February 2025), 14–15.

<sup>11</sup> Christian Bueger, *Africa's Maritime Security Relations and the Global Responsibility to Protect the Sea*, par. 11.

<sup>12</sup> ABC News, "Undersea Cable Cutter: China Unveils Deep Sea Device Raising Pacific Tensions," 27 April 2025, <https://www.abc.net.au/news/2025-04-28/undersea-cable-cutter-china-australia-seabed-pacific-islands/105175224> (accessed 9 May 2025).

<sup>13</sup> Sean Lyngaas, "US Maritime Cybersecurity Faces New Challenges and Opportunities," *CyberScoop*, 22 April 2025, <https://cyberscoop.com/us-maritime-cybersecurity-challenges-opportunities-2025/> (accessed 9 May 2025).

<sup>14</sup> European Union Agency for Cybersecurity, *Threat Landscape for Submarine Cable Infrastructure* (Brussels: ENISA, 2024), 29–30.

<sup>15</sup> Meg Keen, "Deep Sea Mining Is the New Front in Pacific Competition," *The Strategist* (Australian Strategic Policy Institute), 28 April 2025, <https://www.aspistrategist.org.au/deep-sea-mining-is-the-new-front-in-pacific-competition/> (accessed 9 May 2025).

<sup>16</sup> U.S. Dept. of Justice, "Team Telecom Recommends that the FCC Deny Pacific Light Cable Network System's Hong Kong Undersea Cable Connection to the United States," Office of Public Affairs, 17 June 2020, <https://www.justice.gov/archives/opa/pr/team-telecom-recommends-fcc-deny-pacific-light-cable-network-system-s-hong-kong-undersea>.

People's Republic of China's cybersecurity laws would have required the Hong Kong landing station to host state-access 'lawful-intercept' equipment. Likewise, Russia's SORM regulations oblige every international gateway, including cable landings, to install FSB-controlled surveillance boxes. Control of cable segments thus confers not only a physical chokehold but also an intelligence advantage, echoing the British monopoly over telegraph relay stations a century ago.<sup>17</sup>

Europe cannot assume immunity from these trends. A CSIS model already cited shows that a 48 hour blackout on the Asia-Europe trunk line would cost the EU tens of billions of euros – an impact that would roughly double if a simultaneous cyberattack crippled major cloud providers.<sup>18</sup> The World Economic Forum's Cyber Resilience Compass notes that barely one third of cable consortium members operating in Southeast Asia meet baseline resilience standards for crisis management and supply chain security.<sup>19</sup>

Taken together, the hybrid, technological and legal vectors make submarine cables attractive targets in an era of strategic rivalry.

### 3. Europe's Economic Stakes in the Indo Pacific Data Arteries

Europe's prosperity is heavily entangled with Indo Pacific data routes in three distinct ways. First, the region has become the EU's principal cloud interconnection hub. Two thirds of the Union's public cloud traffic is routed through hyperscale data centres in Singapore, Mumbai, Tokyo and Sydney, all linked by Indo Pacific cables.<sup>20</sup> Amazon Web Services, Microsoft Azure and Google Cloud collectively account for 66% of that market, giving Washington – and potentially Beijing through commercial leverage – significant coercive capacity.<sup>21</sup> A 'kill switch' denial of service, even if short lived, would paralyse financial clearing, tele medicine and smart manufacturing lines across Europe.

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<sup>17</sup> Graham, "Undersea Cable Control".

<sup>18</sup> Center for Strategic and International Studies, Submarine Cables and Global Infrastructure Vulnerability, 27.

<sup>19</sup> World Economic Forum and Oxford Martin School, The Cyber Resilience Compass: Journeys Towards Resilience (Geneva: WEF, 2025), 18.

<sup>20</sup> Emily Benson, "The Transatlantic Tech Clash: Will Europe 'De Risk' from the United States?," Center for Strategic and International Studies Report (Washington, DC: CSIS, May 2025), 4.

<sup>21</sup> Ibid., 6–7.

**Second**, the EU's trading model relies on time sensitive digital flows. Roughly 40% of all European cross border data exchanges now involve an Asian counterpart, up from 25% in 2018.<sup>22</sup> TeleGeography records a 52% surge in eastbound traffic on the SEA ME WE transit corridor during the pandemic induced e commerce boom.<sup>23</sup> The economic multiplier is substantial: estimates by Centre for European Policy Studies suggest that a 1% increase in data traffic adds 0.14 per cent to EU GDP.<sup>24</sup> That link explains why sectoral lobbies – from fintech in Frankfurt to vehicle to everything (V2X) developers in Gothenburg – have pressed Brussels to treat cable resilience as an 'industrial competitiveness issue' rather than a narrow security niche.

**Third**, the Union's own ambition for open strategic autonomy depends on diversifying beyond a handful of chokepoints. Forty one of the 71 cables that connect Europe to Asia converge in the Red Sea, the Gulf of Aden or the Strait of Malacca.<sup>25</sup> The Suez obstruction of 2021 and the Red Sea drone attacks of 2024 exposed how maritime turmoil instantly translates into latency spikes and bandwidth rationing. During a three day outage on the AAE 1 cable in January 2024, latency – i.e., the round-trip delay experienced by each data packet – on Frankfurt Singapore routes jumped by 28% while spot cloud compute prices in the EU's west central availability zone rose by 31%.<sup>26</sup> China's official white paper on trade relations frames such incidents as evidence that 'secure and controllable' routes must bypass 'politically hostile waters'.<sup>27</sup> In effect, Beijing is normalising competitive routing, forcing Europe to follow suit or cede bargaining power.

The EU's first response has been the Global Gateway, which, despite channelling substantial funds into connectivity, lacks a concrete focus on submarine cables,

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<sup>22</sup> TeleGeography, "Global Internet Geography Dataset," 2024.

<sup>23</sup> TeleGeography, "Submarine Cable Map & Industry Overview," 2024, dataset download (accessed 9 May 2025).

<sup>24</sup> Centre for European Policy Studies, "EU Economic Security: Confronting the Dual Challenge of China and the US," CEPS Policy Insight (April 2025), 12.

<sup>25</sup> TeleGeography, "Submarine Cable Map & Industry Overview," 2024, regional statistics.

<sup>26</sup> Center for Strategic and International Studies, *Submarine Cables and Global Infrastructure Vulnerability* (Washington, DC: CSIS, 2024), 27.

<sup>27</sup> State Council Information Office of the People's Republic of China, *China's Position on China US Economic and Trade Relations* (Beijing, April 2025), 15.

many of which remain entirely unfunded.<sup>28</sup> At the same time, the India–Middle East–Europe Corridor (IMEC) has gained momentum as an alternative ‘spice route’, linking Mumbai to Piraeus and northern Adriatic ports via Fujairah, Haifa and Trieste.<sup>29</sup> Italian firms view the project as a chance to cement the peninsula’s role as a Mediterranean data junction, mirroring its historical logistics function.<sup>30</sup> Yet financing gaps remain: a Clingendael assessment warns that without a pan European consortium – including Orange Marine, Alcatel Submarine Networks (ASN) and new entrants such as Prysmian – the corridor could fall under non EU ownership, recreating the dependency Brussels seeks to escape.<sup>31</sup>

Finally, the Union’s regulatory capital offers leverage if paired with operational capability. The proposed Anti Coercion Instrument, the Foreign Subsidies Regulation and a forthcoming Critical Raw Materials Act have broadened the concept of economic security.<sup>32</sup> Extending that logic to the seabed would justify: (i) mandatory resilience audits for any cable landing on EU territory; (ii) export credit incentives for European fibre and repeaters; and (iii) inclusion of cable systems in stress test cycles run by the European Systemic Risk Board.

#### 4. Tools and Alliances: Making Europe a Credible Subsea Security Provider

Europe’s growing exposure is not inevitable. A toolbox already exists – albeit fragmented – that can be combined into a coherent strategy combining regulatory power, operational presence and industrial leverage.

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<sup>28</sup> Alexandra Gomes and Maaïke Okano Heijmans, “Connecting the Dots: Linking Digital Global Gateway to Local Needs,” Clingendael Policy Brief (The Hague: Clingendael Institute, April 2025), 2.

<sup>29</sup> Cristian Gherasim, “New India to Europe ‘Spice Route’ Gains Traction amid Global Tensions,” Euronews, 5 May 2025, <https://www.euronews.com/my-europe/2025/05/05/new-india-to-europe-spice-route-gains-traction-amid-global-tensions> (accessed 9 May 2025).

<sup>30</sup> Francesco Bechis, “Italia e India, legami strategici: intervista all’ambasciatrice Vani Rao,” Formiche, 25 April 2025, <https://formiche.net/2025/04/italia-india-vani-rao-ambasciatrice-legami-strategici/?amp> (accessed 9 May 2025).

<sup>31</sup> Gomes and Okano Heijmans, “Connecting the Dots”, 5.

<sup>32</sup> European Commission, “Proposal for a Regulation of the European Parliament and of the Council on the Protection of the Union and Its Member States from Economic Coercion by Third Countries (Anti Coercion Instrument),” COM(2021) 775 final, 8 December 2021; Council of the European Union, “Regulation (EU) 2023/1542 on Foreign Subsidies Distorting the Internal Market,” *Official Journal of the European Union* L 191, 12 July 2023; European Commission, “A Secure and Sustainable Supply of Critical Raw Materials in the EU,” COM(2023) 160 final, 16 March 2023.

**a. Multilateral Platforms – from Talk shops to Task forces:** The EU is a dialogue partner in almost every Indo Pacific security forum, yet cables rarely feature on their agendas. Three venues matter most:

- **ASEAN Regional Forum (ARF).** The ARF conducts annual maritime security exercises but has never run a subsea infrastructure scenario. Brussels should table a ‘Cable Resilience Table Top’ in 2026, pairing the European Union Agency for Cybersecurity (ENISA) experts with Singapore’s Maritime and Port Authority.<sup>33</sup> Success would normalise the topic and unlock capacity building funds under the EU ASEAN Joint Cooperation Committee.
- **Quad’s Indo Pacific Partnership for Maritime Domain Awareness (IPP MDA).** Although the EU is not a member, the programme openly invites third party data contributors. Incorporating Copernicus satellite analytics and the Italian COSMO SkyMed constellation would offer tangible value in exchange for privileged access to IPP MDA’s under sea activity feeds.<sup>34</sup>
- **NATO Outreach to the ‘IP4’.** The Vilnius Summit tasked NATO with upgrading political dialogue with Australia, Japan, New Zealand and South Korea. Brussels should synchronise its naval deployments – ATALANTA, AGENOR, ASPIDES – with the Alliance’s forthcoming ‘Subsea NATO IP4 Concept’ so that cable surveillance patrols are mutually reinforcing rather than duplicative.<sup>35</sup>

**b. Infrastructure Diplomacy – Global Gateway and IMEC:** Hard dollars still speak loudest. The Global Gateway earmarks up to €50 billion for digital connectivity, but only a fraction is assigned to wet segment projects. A 2024 progress review found that 6 of 46 flagship schemes involve cables and that none has reached financial close; moreover, the Commission should launch a Digital Window – a dedicated envelope of at least €7 billion focused exclusively on subsea resilience, mirroring the energy window model used for the Southern Gas Corridor.<sup>36</sup>

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<sup>33</sup> ASEAN Regional Forum, “Maritime Security Dialogue Outcomes,” 2024, <https://asean.org> (accessed 9 May 2025).

<sup>34</sup> White House, “Indo Pacific Partnership for Maritime Domain Awareness (IPP MDA) Fact Sheet,” 24 May 2022, <https://www.whitehouse.gov> (accessed

<sup>35</sup> Giovanni Abbondanza, “NATO Europe US Cooperation in the Indo Pacific: Challenging Times Ahead,” IAI Commentaries 25/15 (March 2025): 2.

<sup>36</sup> European Commission, “Global Gateway Progress Report 2024,” Brussels, 2024, 6.



The India–Middle East–Europe Corridor (IMEC) offers a laboratory to test that approach. Its planned Blue Raman 2 cable, connecting Mumbai to Genoa via Haifa and Marseille, could become the first demonstrator financed under blended EIB, InvestEU and private equity capital.<sup>37</sup> Rome's ambition to turn Gioia Tauro and Trieste into Mediterranean landing hubs aligns neatly with New Delhi's wish to bypass the Red Sea chokepoint. An EU India Secure Connectivity MoU, similar to the 2022 pact with Japan, would lock in common security standards at the design stage.<sup>38</sup>

**c. Public–Private Consortia and Industrial Capability:** Only two European operators – Alcatel Submarine Networks and Orange Marine – retain end to end competencies in deep sea installation and repair.<sup>39</sup> To avoid further attrition, Brussels should seed a European Subsea Infrastructure Alliance (ESIA) with three functions: (i) pooling maritime assets under an EU flag of convenience; (ii) channelling R&D funds into terabit repeaters and quantum secure encryption for the wet segment; and (iii) providing a ready made consortium structure for Global Gateway tenders.

**d. Intelligence Sharing and Crisis Response:** The United Nations Institute for Disarmament Research (UNIDIR)'s 'Achieving Depth' framework distinguishes between absorptive, restorative and adaptive capacities.<sup>40</sup> The EU is strongest on absorption – legal deterrence and market punishment – but weakest on restoration, namely the ability to deploy repair ships and splice new fibre shortly. A Subsea Situation Room inside EMASoH<sup>41</sup> HQ in Rota, linked to NATO's new Maritime Centre for Undersea Infrastructure (MCU I), would close that gap. The unit would ingest AIS spoofing alerts, Copernicus imagery and IPP MDA feeds, producing an unclassified common operating picture shareable with industry.

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<sup>37</sup> TeleGeography, "Blue Raman Cable System," Cable Project Database, 2025, <https://www.submarinecablemap.com> (accessed 9 May 2025).

<sup>38</sup> European External Action Service, "EU India Secure Connectivity Partnership Memorandum of Understanding," 8 May 2025.

<sup>39</sup> Galassi and Marchionna, "Submarine Networks," 18–19.

<sup>40</sup> Kavanagh et al., *Achieving Depth: Subsea Telecommunications Cables as Critical Infrastructure* (Geneva: UNIDIR, 2025), 32.

<sup>41</sup> European Maritime Awareness in the Strait of Hormuz

**e. Regulatory Leverage – From Audit to Enforcement:** A draft EU Subsea Infrastructure Protection Directive should require operators to: (i) conduct annual resilience audits aligned with the WEF Cyber Resilience Compass maturity model;<sup>42</sup> (ii) notify ENISA of any incident within six hours;<sup>43</sup> and (iii) hold an EU digital sovereignty rating of at least ‘BBB’ under the forthcoming Economic Security Screening Regulation.<sup>44</sup> Penalties for non compliance – up to 5% of global turnover – would mirror the deterrent effect of the General Data Protection Regulation (Regulation (EU) 2016/679, ‘GDPR’) while avoiding extraterritorial overreach.

Finally, hybrid attacks demand hybrid remedies. Article 5 of the NATO Treaty refers to ‘armed attack’, yet the 2023 Vilnius communiqué opened the door to collective defence responses against attacks on under sea infrastructure. Embedding a reversible but credible response option – such as sanctions on subsea mining licences – would make coercion less attractive.<sup>45</sup>

## 5. Resilience Policies: Diversification, Redundancy and Digital Sovereignty

The World Economic Forum’s Global Risks Report 2025 ranks a prolonged trans regional data outage among the top ten threats to economic stability.<sup>46</sup> For the EU, resilience therefore hinges on three mutually reinforcing pillars.

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<sup>42</sup> World Economic Forum and Oxford Martin School, *The Cyber Resilience Compass: Journeys Towards Resilience* (Geneva: WEF, 2025), 21.

<sup>43</sup> European Union Agency for Cybersecurity, *Threat Landscape for Submarine Cable Infrastructure* (Brussels: ENISA, 2024), 33.

<sup>44</sup> European Commission, “Proposal for a Regulation Establishing the Economic Security Screening Regulation,” COM(2025) 230 final, 15 April 2025.

<sup>45</sup> North Atlantic Treaty Organization, “Vilnius Summit Communiqué,” 11 July 2023, para. 25.

<sup>46</sup> World Economic Forum, *Global Risks Report 2025* (Geneva: WEF, January 2025), 12.

**First, diversify physical routes and build redundancy.** Reliance on two corridors – the Red Sea and the Strait of Malacca – creates a single point of systemic failure. CSIS scenario modelling suggests that adding just one Arctic and one South Atlantic trunk line could reduce Europe's outage risk by 38%.<sup>47</sup> Projects under way – the Arctic Connect feasibility study and the 2Africa Atlantica extension – must be accelerated, even if short term costs are higher. The emerging India–Middle East–Europe Corridor (IMEC) offers a mid latitude alternative that bypasses the Bab el Mandeb chokepoint; EU participation should be locked in before non European financiers dominate the consortium.<sup>48</sup>

**Second, enhance industrial capacity and sovereign control.** UNIDIR's absorptive–restorative–adaptive framework highlights the gap in restoration capacity: Europe can sanction aggressors but lacks enough cable repair ships to splice fibre within 48 hours.<sup>49</sup> Only three EU flagged vessels are currently certified for deep sea maintenance. A Strategic Subsea Reserve Fleet – co funded through the Strategic Technologies for Europe Platform – would double that number by 2028 and guarantee on call coverage for the Indo Pacific leg. Meanwhile, an econometric study shows that coastal states with at least two landing stations enjoy 27% lower downtime after accidents.<sup>50</sup> The EU should therefore support secondary landing sites in Portugal, Greece and Croatia to complement Marseille, Bari and Bilbao.

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<sup>47</sup> Center for Strategic and International Studies, *Submarine Cables and Global Infrastructure Vulnerability* (Washington, DC: CSIS, 2024), 33.

<sup>48</sup> Gherasim, "New India to Europe 'Spice Route' Gains Traction amid Global Tensions".

<sup>49</sup> Kavanagh et al., *Achieving Depth*, 35.

<sup>50</sup> David Franken, Maike Shelter and Luca Colombo, "Hidden Structures of a Global Infrastructure: Expansion Factors of the Subsea Cable Network," *Technological Forecasting & Social Change* 197 (March 2025): 108574.

### Third, fuse digital and energy security under a single regulatory umbrella.

As Europe rolls out smart grids and green hydrogen pipelines, data and power cables will increasingly share seabed corridors. The Italian–Tunisian ELMED<sup>51</sup> interconnector already embeds dark fibre within its HVDC bundle, offering a template for dual use design.<sup>52</sup> Brussels should mandate co-location where geologically feasible and require joint cyber resilience audits, following the maturity model set out in the WEF Cyber Resilience Compass.<sup>53</sup>

Turning principles into policy demands legal teeth. The forthcoming EU Subsea Infrastructure Protection Directive must legislate mandatory incident reporting, cross border repair privileges and minimum insurance coverage. Its enforcement clause should mirror the critical energy infrastructure provisions of the 2023 EU Maritime Security Strategy, enabling rapid asset freezes against entities that obstruct cable repairs.<sup>54</sup> Moreover, the new EU Action Plan on Cable Security<sup>55</sup> can operationalise those legal duties – tasking Member States to map single-point vulnerabilities, stage joint repair exercises and build spare-parts stockpiles – while dovetailing with the NIS2 Directive,<sup>56</sup> whose cyber-risk assessments and real-time information-sharing platforms will provide the digital early-warning layer for physical cable incidents. At the geopolitical level, NATO’s 2023 Vilnius communiqué already treats large scale attacks on under sea assets as possible triggers for collective defence; codifying a consultative mechanism with the EU would add additional deterrent value.<sup>57</sup>

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<sup>51</sup> The Italian–Tunisian ELMED project refers to a planned 600 MW high-voltage direct current (HVDC) submarine power cable connecting the electricity grids of Italy and Tunisia. This project aims to enhance energy security and facilitate the integration of renewable energy sources between Europe and North Africa. See: <https://elmedproject.com/>

<sup>52</sup> Galassi and Marchionna, “Submarine Networks,” 21.  
World Economic Forum and Oxford Martin School, *The Cyber Resilience Compass*, 24.

<sup>53</sup> World Economic Forum and Oxford Martin School, *The Cyber Resilience Compass*, 24.

<sup>54</sup> Council of the European Union, *EU Maritime Security Strategy (Updated Version)* (Brussels, March 2023), 19.

<sup>55</sup> European Commission and High Representative of the Union for Foreign Affairs and Security Policy, *EU Action Plan on Cable Security*, Joint Communication to the European Parliament and the Council, JOIN (2025) 9 final (Brussels, 21 February 2025), <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:52025JC0009>

<sup>56</sup> European Parliament and Council of the European Union, Directive (EU) 2022/2555 of 14 December 2022 on measures for a high common level of cybersecurity across the Union (NIS 2 Directive), OJ L 333/80, 27 December 2022, <https://eur-lex.europa.eu/eli/dir/2022/2555/oj/eng>

<sup>57</sup> North Atlantic Treaty Organization, “Vilnius Summit Communiqué,” para. 25.

By weaving diversification, industrial depth and integrated governance into a single policy framework, Europe can shift from reactive vulnerability to proactive resilience, turning the seabed from an Achilles' heel into a showcase of strategic autonomy and a stabilising anchor for the global digital economy.

## Conclusion and Policy Outlook

Europe has entered an era in which the quiet infrastructure stretched across the seabed is no longer a technical afterthought but a frontline variable of power politics. The analysis developed in this paper shows that the EU rests on data arteries that are geographically concentrated, industrially dependent and increasingly exposed to hybrid pressure. Two over used corridors – the Red Sea–Suez axis and the Strait of Malacca–South China Sea funnel – carry close to 40% of the Union's external data traffic, while seven foreign firms, none of them headquartered in the EU, now own or operate the bulk of the wet segment capacity. The risks are therefore structural, not episodic, and demand a structural response.

That response must proceed along six tightly inter linked lines. First, the EU should accelerate diversification by co financing at least two truly alternative trunk routes: the low latitude India–Middle East–Europe Corridor, which bypasses the Bab el Mandeb chokepoint, and the high latitude Arctic Connect cable, which shortens the path to North East Asia. Second, Brussels needs a credible repair capability: a Strategic Subsea Reserve Fleet of five EU flagged cable vessels, financed through the European Investment Bank (EIB) and the Strategic Technologies for Europe Platform (STEP), would guarantee that any break in the Indo Pacific segment can be spliced within 48 hours. Third, a European Subsea Infrastructure Alliance (ESIA) should coordinate private operators in bidding for Global Gateway tenders and embed security by design standards from the drafting stage.

Fourth, the EU must upgrade situational awareness. A dedicated Subsea Situation Room inside the EU Naval Force (EU NAVFOR) headquarters at Rota, interfaced with the North Atlantic Treaty Organization (NATO) Maritime Centre for Undersea Infrastructure and with the Quad's Indo Pacific Partnership for Maritime Domain Awareness, would fuse satellite, acoustic and automatic identification system data into a single operating picture. Fifth, economic and legal deterrence tools need sharpening: the forthcoming Anti Coercion Instrument and the Foreign Subsidies Regulation should be extended to cover cable consortia, while a Subsea Infrastructure Protection Directive would mirror the enforcement bite of the General Data Protection Regulation (GDPR) in the digital sphere.

Finally, strategic autonomy cannot be achieved in isolation. Cooperation for instance with the Indo Pacific Four (IP4) – Australia, Japan, the Republic of Korea and New Zealand – should evolve from episodic dialogues into a standing Cable Security Working Group that meets quarterly and exercises annually at sea. Together, these six measures would move the EU from a position of reactive vulnerability to one of proactive resilience, turning the seabed from an Achilles heel into a showcase of European agency in an increasingly contested Indo Pacific.

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# MARITIME GREY ZONE AND ICAD ACTIVITIES: A COMPARATIVE ANALYSIS OF RUSSIA IN EUROPE AND CHINA IN THE INDO-PACIFIC

*Maren Tomforde*

## Abstract

The maritime domain has emerged as a critical theatre for grey zone operations, with state actors increasingly employing ambiguous, coercive tactics to advance their interests while avoiding outright military conflict. These actions, which fall between peace and open warfare, are employed to achieve strategic objectives while remaining below the threshold of war that would trigger direct kinetic responses. Russia and China, two of the most prominent grey zone actors, utilise distinct but sometimes overlapping grey zone tactics in their respective regions. Recent developments have highlighted that European and Indo-Pacific security are increasingly interlinked. This article provides a comparative analysis of Russia's and China's maritime grey zone activities, detailing their methods, strategic aims, and operational styles.

## Introduction: The Challenge of Maritime Grey Zone Operations

In the evolving landscape of international security, grey zone operations have become a favoured instrument of statecraft.<sup>1</sup> These operations exploit ambiguity, deniability, and legal loopholes to achieve geopolitical goals without triggering conventional military responses. The maritime domain, vital for global trade, energy security, and strategic mobility, is particularly vulnerable to such tactics.<sup>2</sup> Common

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<sup>1</sup> Parts of this text have been edited and proofread with the assistance of DeepL Translate (DeepL.com) to improve clarity and accuracy in English expression. Final revisions were performed by the author.

<sup>2</sup> Lorenzo Giordano, 'The EU and Its Maritime Security Strategy in the Indo-Pacific - Finabel', InfoFlash (Finabel, 21 September 2021), <https://finabel.org/the-eu-and-its-maritime-security-strategy-in-the-indo-pacific/>.

threats to maritime security used to only include piracy, terrorism, illegal fishing, and human trafficking. To meet changing threats and challenges such as maritime grey zone operations by state actors the concept of maritime security needs to evolve constantly.<sup>3</sup>

Russia and China have emerged as leading practitioners of maritime grey zone strategies, albeit with differing approaches shaped by their geopolitical environments and strategic ambitions. Russia's grey zone activities in Europe, particularly in the Baltic Sea, involve covert sabotage and hybrid naval tactics aimed at destabilising NATO and European infrastructure. China's maritime grey zone campaigns in the Indo-Pacific emphasise incremental territorial consolidation, legal-economic coercion, and the use of a formalised maritime militia to assert sovereignty over disputed waters. A discussion of the two actors reveals both similarities and differences in tactical conduct and adversarial responses, from which critical lessons for the international community to navigate future malign actions in the maritime grey zone domain can be drawn.

This paper addresses the following research questions: How do Russia's maritime grey zone activities in Europe differ from China's in the Indo-Pacific, what can be learned from comparing these approaches, and how are these challenges being countered?

In order to more accurately capture the subtleties of such tactics, it is imperative to elucidate the key terms and conceptual frameworks that are pivotal to the discourse: grey zone, hybrid threats, sabotage, and the ICAD framework.

In the maritime domain, the **grey zone** refers to contested areas between the exclusive economic zones (EEZs) of different nations. These regions present significant challenges for law enforcement and international coordination, as they are often outside clearly defined legal jurisdictions.<sup>4</sup> Grey Zone actors exploit the applicable rules to pursue their strategic objectives, whether by taking advantage of

<sup>3</sup> Kakati Prashanthi and Shivam Pandey, 'Defining "Maritime Security"', *International Journal of Advance and Applied Research* 04 (1 August 2023): 123–29, <https://doi.org/10.5281/zenodo.8275038>.

<sup>4</sup> Shadi Abdelwahab, 'Grey Zone Operations Responding to the Escalating Threats to Maritime Security – Aljundi Journal – A Military & Cultural Monthly Magazine', 2 April 2025, <https://www.aljundi.ae/en/grey-zone-operations-responding-to-the-escalating-threats-to-maritime-security/the-file/>.



regulatory gaps, circumventing their obligations, or falsely portraying their actions as legally justified. For EU Member States and NATO Allies, international law serves as a normative framework that provides them with legal authorities, processes and instruments to counter hybrid threats in the maritime domain.<sup>5</sup>

Grey zone operations often involve coercive actions aimed at securing strategic advantages below the threshold of war. Thus direct military confrontation is avoided, while geopolitical objectives are still achieved through some form of coercion and use of force. By manipulating the ambiguities of the law and diplomacy, the aggressor in the grey zone attempts to evade direct reprisal or other forms of consequences. Legal loopholes are frequently and deliberately exploited to gain an operational advantage. Military and non-military tools are combined, which mostly rely on manoeuvres to expand territorial influence while at the same time maintaining diplomatic ties with the states under attack. Grey zone activities in the maritime domain mostly seek to solidify regional influence without completely destabilising the region.

According to the European Centre of Excellence on Hybrid Threats (Hybrid CoE), we live in an era of hybrid threats. Especially in the maritime domain, these hybrid threats are difficult to model due to their complex appearance. The cascading effects of such hybrid attacks pose a particularly grave threat, given that they exploit vulnerabilities and interconnections in various areas and systems. For example, the effects of hybrid threats tend to become magnified rather quickly through global supply chains.<sup>6</sup>

Hybrid warfare and grey zone operations share commonalities but are still distinct concepts. Hybrid warfare typically involves a mix of conventional and unconventional military tactics and mostly involves direct military engagement. After Russia's annexation of Crimea in 2014, the term hybrid warfare has become

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<sup>5</sup> Aurel Sari, 'Hybrid CoE Research Report 14: Protecting Maritime Infrastructure from Hybrid Threats: Legal Options', March 2025, <https://www.hybridcoe.fi/publications/hybrid-coe-research-report-14-protecting-maritime-infrastructure-from-hybrid-threats-legal-options/>.

<sup>6</sup> Georgios Giannoulis, 'Handbook on Maritime Hybrid Threats: 15 Scenarios and Legal Scans', March 2023, <https://www.hybridcoe.fi/publications/hybrid-coe-paper-16-handbook-on-maritime-hybrid-threats-15-scenarios-and-legal-scans/>.

associated with Russian military strategy.<sup>7</sup> This Russian annexation is a prime example for hybrid warfare. It is a tactical approach combining conventional military force with unconventional methods such as cyberattacks, disinformation, irregular forces, economic coercion, and lawfare. Hybrid warfare often includes kinetic actions (e.g., targeted missile or artillery strikes, bombings, use of armed drones) and is a method frequently employed within the frame of grey zone operations.

A specific hostile act involving deliberate damage or disruption of physical or digital infrastructure is **sabotage**. Sabotage is a kinetic or physical form of attack that can be part of broader grey zone tactics or hybrid campaigns. It is used frequently by Russia in the Baltic Sea and its littoral regions.

The ICAD framework has been introduced by General Romeo Brawner (Chief of Staff of the Armed Forces of the Philippines) to describe certain grey zone activities, especially in the maritime Indo-Pacific. The acronym stands for **I**llegal, **C**oercive, **A**ggressive, **D**eceptive.<sup>8</sup> While the broader concept of the grey zone remains widely used it is too 'benign and dull' for General Brawner. This fairly new ICAD framework is slowly gaining popularity among scholars and practitioners alike as a more precise and critical label for certain maritime grey zone activities. ICAD e.g., manages to precisely capture China's assertive behaviour in contested waters, which violates other states' sovereign rights, and jurisdiction. As such the framework goes beyond the concept of grey zone activities by explicitly characterising malign activities as unlawful and hostile, emphasising coercion and deception, and thereby removing the ambiguity that traditional grey zone definitions often entail.<sup>9</sup>

The Indo-Pacific is (still) the epicentre of ICAD-driven maritime disputes. Grey zone implies shadowy, behind the scenes actions, while much of what China is doing e.g., in the South China Sea is out in the open. Markus Garlauskas views China's ICAD

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<sup>7</sup> Manuela Previtera, 'Is the Gray the New Black? Russia's Recycled Soviet Tactics Directed against Europe', 10 February 2025, <https://iari.site/2025/02/10/is-the-gray-the-new-black-russias-recycled-soviet-tactics-directed-against-europe/>.

<sup>8</sup> Markus Garlauskas, 'Dispatch from Manila: On the Frontlines of the "Gray Zone" Conflict with China - Atlantic Council', 12 September 2024, <https://www.atlanticcouncil.org/blogs/new-atlanticist/dispatch-from-manila-on-the-frontlines-of-the-gray-zone-conflict-with-china/>.

<sup>9</sup> Adam Lockyer, Yves-Heng Lim, and Courtney J. Fung, 'Moving beyond the Grey Zone: The Case for ICAD | Lowy Institute', *The Interpreter*, 17 July 2024, <https://www.loyyinstitute.org/the-interpreter/moving-beyond-grey-zone-case-icad>.

activities e.g., against the Philippines as the most visible ones and as such, the ‘least grey’ element of China’s toolbox.<sup>10</sup> In this case, the grey zone categorisation is seen as too broad and too vague. It rather undermines than invigorates an international response. The very term grey zone apparently leads officials to hesitation and indecision. By contrast, ICAD presents itself as a more appropriate concept to help leaders and policymakers to frame and understand threats so as to develop a strategy, policy, plans, operations, and tactics to counter them.

In other words, to work with adequate concepts is indispensable. Understanding the distinctions and analytical caveats of the terms discussed is central for the comparative analysis in the course of this paper: grey zone is the overarching context, hybrid warfare is a blend of tactics within that context, sabotage is a concrete act, and ICAD offers a more precise lens for evaluating specific grey zone actions.

## Russia’s “Deceptive Green Men” and Maritime Grey Zone Activities in Europe

Russia’s grey zone operations in the maritime domain are marked by covert sabotage, cyberattacks, GPS spoofing, hybrid naval warfare, and the use of so-called ‘shadow fleets’. Scholars view that these grey zone tactics to threaten and weaken Europe are not new but are revived tactics from the Soviet era. They are deeply rooted in a Russian tradition of asymmetric strategies and a permanent wartime mentality aimed at destabilising adversaries for geopolitical objectives.<sup>11</sup> Russian military itself defines its strategy as ‘next-generation war’, while the term hybrid warfare is primarily used in Russia to discuss Western destabilisation operations aimed at Russia.<sup>12</sup> Russia’s 2021 ‘National Security Strategy’ deems it legitimate to

<sup>10</sup> Markus Garlauskas, ‘Dispatch from Manila: On the Frontlines of the “Gray Zone” Conflict with China - Atlantic Council’.

<sup>11</sup> Mathieu Boulègue and Alina Polyakova, ‘The Evolution of Russian Hybrid Warfare: Executive Summary’, *CEPA* (blog), 29 January 2021, <https://cepa.org/comprehensive-reports/the-evolution-of-russian-hybrid-warfare-executive-summary/>.

<sup>12</sup> Manuela Previtera, ‘Is the Gray the New Black? Russia’s Recycled Soviet Tactics Directed against Europe’, Mark Galeotti, ‘The Mythical “Gerasimov Doctrine” and the Language of Threat’, *Critical Studies on Security* 7, no. 2 (4 May 2019): 157–61, <https://doi.org/10.1080/21624887.2018.1441623>.

take symmetric and asymmetric measures to counter actions by adversaries. Russian Foreign Minister Sergey Lavrov underlined in an interview in January 2023 that the war in Ukraine was Russia's legitimate response to a hybrid war instigated by the West. As Russia lacks the military capabilities to challenge NATO in a conventional war, low-cost and high-impact hybrid attacks seem to be a viable alternative to destabilise Europe, undermine Western public support for the war in Ukraine, and to fight against Western allies without triggering a direct war.<sup>13</sup>

The threats identified by Western security services ever since the annexation of Crimea in 2014, largely undertaken by Russia's unmarked soldiers often described by the misleading diminutive term 'little green men'. They should be rather called 'deceptive green men' as they wear Russian-style combat uniforms but lack any identifying insignia. They play a crucial role in Russia's strategy of hybrid warfare, which combines conventional military force with subversive tactics and cyber warfare to achieve political objectives without triggering a full-scale war. The use of these troops marked a significant shift in how modern conflicts are conducted, emphasising the importance of ambiguity and plausible deniability.<sup>14</sup> Ever since 2014 and especially after the start of the war in Ukraine in 2022, Europe has seen a significant increase in sabotage campaign, which after investigations point to Russian state-sponsored operations aimed to destabilise Europe and diminish support for Ukraine.

The growing threat of Russian and like-minded countries' sabotage operations has been partly escalating into outright violence (e.g., bomb and arson attacks, assassination plots) in the past few years and is targeting critical infrastructure across Europe. These actions are not focused solely on the maritime domain, however, the destruction of subsea communications networks as part of Russia's hybrid warfare tactics is among the most critical areas of concern for European security. Submarine cables serve as crucial conduits for internet lines as well as oil and gas pipelines. Over the past years, these submarine cables have been

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<sup>13</sup> Helmi Pillai, 'Protecting Europe's Critical Infrastructure from Russian Hybrid Threats | Centre for European Reform', 25 March 2023, <https://www.cer.eu/publications/archive/policy-brief/2023/protecting-europes-critical-infrastructure-russian-hybrid>; Manuela Previtera, 'Is the Gray the New Black? Russia's Recycled Soviet Tactics Directed against Europe'.

<sup>14</sup> Robert Muller, 'Russia's Use of Little Green Men in the Conflict in Ukraine', 3 September 2024, <https://medium.com/@DrRobertMuller/russias-use-of-little-green-men-in-the-conflict-in-ukraine-95ece34741ad>.

transformed through malicious cable attacks by Russia, China and other state-supported actors into securitised objects requiring special measures of protection.<sup>15</sup> The Baltic Sea has emerged as a hotspot for such critical undersea infrastructure (CUI) and the effort to sabotage marine offshore cables.<sup>16</sup>

To give just two recent examples: in November 2024, two submarine communication cables (variously known as subsea, subsurface, and undersea cables) between Germany/Finland and Sweden/Lithuania were allegedly severed by the Chinese cargo ship *Yi Peng 3*. German defence minister Boris Pistorius announced right after the incident that the government assumed the damage to these undersea fibreoptic communication cables in the Baltic Sea was an act of sabotage:

‘No one believes that the cables were accidentally damaged. I also don’t want to believe that the ships’ anchors caused the damage by accident. We have to assume, without certain information, that the damage is caused by sabotage.’<sup>17</sup>

In December 2024, the undersea electric cable EstLink2 (connecting Finland and Estonia) was damaged along with four telecommunication cables. Investigations point to the United Arab Emirates-owned LLC oil tanker *Eagle S* sailing under the Cook Islands’ flag as having caused the damage. Cases like these have much in common as they involve commercial vessels dragging their anchors on the seabed. All ships were sailing from Russian ports.<sup>18</sup>

Anxiety is raised within EU and NATO as these attacks on critical infrastructure highlight the vulnerability of undersea networks and the difficulty of attribution and response. The use of commercial or civilian vessels, operating as part of the Russian ‘shadow fleet’, complicates detection and enforcement, as these ships can blend in with regular maritime traffic.

<sup>15</sup> Brendon J. Cannon and Pooja Bhatt, ‘The Quad and Submarine Cable Protection in the Indo-Pacific: Policy Recommendations’, *Institute for Security and Development Policy* (blog), 25 January 2024, <https://www.isdp.eu/publication/the-quad-and-submarine-cable-protection-in-the-indo-pacific-policy-recommendations/>.

<sup>16</sup> Helmi Pillai, ‘Protecting Europe’s Critical Infrastructure from Russian Hybrid Threats | Centre for European Reform’.

<sup>17</sup> Miranda Bryant and Miranda Bryant Nordic correspondent, ‘We Assume Damage to Baltic Sea Cables Was Sabotage, German Minister Says’, *The Guardian*, 19 November 2024, sec. World news, <https://www.theguardian.com/world/2024/nov/19/baltic-sea-cables-damage-sabotage-german-minister>.

<sup>18</sup> Frida Rintakumpu, Sophie Arts, and Jana Ondraskova, ‘Tensions Under the Baltic Sea | German Marshall Fund of the United States’, 10 January 2025, <https://www.gmfus.org/news/tensions-under-baltic-sea>.

The broader definition of Russia's 'shadow fleet' includes the whole range of evasive tactics to destabilise European countries. In December 2023, the United Nation's International Maritime Organization (IMO) has passed a resolution to urge member states to fight against illegal operations in the maritime sector by the 'dark fleet' or 'shadow fleet'. In the resolution, the term 'dark fleet' or 'shadow fleet' stands for ships that are engaged in illegal operations for the purposes of circumventing sanctions, evading compliance with safety or environmental regulations, avoiding insurance costs or engaging in other illegal activities.<sup>19</sup> This Russian 'shadow fleet' mainly consists of aged, poorly maintained and partly retired, but repurposed vessels, which make use of 'flags of convenience'. To maintain oil exports, Russia employs a variety of tactics including e.g., the concealment of the origins of the cargo, intentionally avoiding flag state and port state control inspections, automatic identification system blackouts, falsified positions and other deceptive or even illegal techniques. In sum, the Russian 'shadow fleet' poses significant environmental, maritime safety, and security risks and is part of a new level of Russian maritime aggression.<sup>20</sup>

In response, Estonia has decided to spearhead maritime legal reform within the IMO. The main aim is to push the international community to modernise centuries-old international maritime law to prohibit damage to undersea infrastructure such as cables and pipelines.<sup>21</sup> The intentional dragging of the anchor in order to harm the undersea infrastructure is not yet specifically covered by maritime law. For example, China did not allow Swedish authorities to board the Yi Peng 3 after having allegedly damaged the two Baltic undersea cables. The People's Republic of China (PRC) claimed that it had provided all documents for the investigation necessary under current maritime law. A reform of the Convention on the Law of the Sea (UNCLOS) shall allow for more calibrated responses to CUI disruptions emphasising the

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<sup>19</sup> International Maritime Organization, 'RESOLUTION A.1192(33)', 11 December 2023, [https://wwwcdn.imo.org/localresources/en/KnowledgeCentre/IndexofIMOResolutions/AssemblyDocuments/A.1192\(33\).pdf](https://wwwcdn.imo.org/localresources/en/KnowledgeCentre/IndexofIMOResolutions/AssemblyDocuments/A.1192(33).pdf).

<sup>20</sup> Anna Caprile and Gabija Leclerc, 'Russia's "Shadow Fleet": Bringing the Threat to Light', November 2024.

<sup>21</sup> Andrius Sytas, 'Maritime Law Has to Be Changed to Protect Undersea Infrastructure, Estonia Says | Reuters', Reuters, 27 December 2024, <https://www.reuters.com/world/europe/maritime-law-has-be-changed-protect-undersea-infrastructure-estonia-says-2024-12-27/>.

importance of using international maritime law in countering grey zone attacks and the aggressive exploitation of legal ambiguities.<sup>22</sup>

## **China's 'Deceptive Blue Men' and Maritime Grey Zone Activities in the Indo-Pacific**

In contrast to Russia's covert and sabotage focused approach, China's maritime grey zone operations in the Indo-Pacific are defined by persistent, overt, and also often legally ambiguous actions.<sup>23</sup> These are aimed at consolidating territorial claims and expanding Chinese influence in disputed waters. Especially in the South China Sea, Beijing assesses that it can achieve its geostrategic aims through grey zone pressure and non-lethal force. So far, China's grey zone tactics in this maritime region have been successful. For example, Southeast Asian fishers have been increasingly driven from traditional fishing grounds and many foreign oil and gas operators engaged in offshore operations in Vietnam had to abandon their projects.<sup>24</sup> To achieve these aims, the Chinese Coast Guard (CCG) is supplemented in these waters by maritime militia vessels manned by 'Little Blue Men', which are also rather referred to here as 'Deceptive Blue Men', as they are not 'little' but malign in their intentions and actions.

The maritime militia is key instrument in the South China Sea to expand its influence and control over disputed maritime space. Actions by the maritime militia, often disguised as civilian fishing vessels, are aimed to appear less escalatory due to their ambiguous identity and lack of visible armaments than the CCG. The nonetheless professional maritime militia fishing vessels operating in the South China Sea are purpose-built, usually state-owned, and fully funded by local, provincial, and central governments. As such they serve as a de facto third sea force next to the CCG and People's Liberation Army Navy (PLAN).

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<sup>22</sup> Cannon and Bhatt, 'The Quad and Submarine Cable Protection in the Indo-Pacific'.

<sup>23</sup> Shadi Abdelwahab, 'Grey Zone Operations Responding to the Escalating Threats to Maritime Security – Aljundi Journal – A Military & Cultural Monthly Magazine'.

<sup>24</sup> Gregory B. Poling, 'China's Military and Security Footprint in Southeast Asia and the Pacific Islands: China's Grey Zone Predations in the South China Sea', 20 March 2025, [https://csis-website-prod.s3.amazonaws.com/s3fs-public/2025-03/ts250320\\_Poling\\_Crossroads\\_Competition.pdf?VersionId=XgkWnXoeWYV.UULVGoOcehKuQEV6pWxU](https://csis-website-prod.s3.amazonaws.com/s3fs-public/2025-03/ts250320_Poling_Crossroads_Competition.pdf?VersionId=XgkWnXoeWYV.UULVGoOcehKuQEV6pWxU).

The militias' actions in the South China Sea actively blur the lines between law enforcement and military action.<sup>25</sup> As already demonstrated in the case of Russia's 'Deceptive Green Men', this Chinese approach of leveraging non-military actors who can be civilian fishermen or paramilitary members makes it difficult for states to determine the appropriate response to blurred lines of accountability. The PRC intentionally uses the weaponisation of ambiguity to minimise the risk of escalation while at the same time advancing its political objectives to maintain a near-constant presence in the international waters of the South China Sea. In these waters, Xi Jinping's maximalist demand for 'historic rights' over islands and shoals as well as maritime rights and resources has taken on an unprecedented political salience.<sup>26</sup> The CCG and 'Deceptive Blue Men' of the maritime militia engage in aggressive tactics, including ramming, laser and water cannon attacks, and the blocking of resupply missions to states such as the Philippines, Vietnam and also Indonesia.<sup>27</sup> Indonesia is not a claimant state in the South China Sea dispute. However, the southernmost part of China's 'ten-dash line' overlaps with Indonesia's EEZ in the North Natuna Sea. In these waters, Indonesian fishermen are often harassed by a plethora of Chinese vessels, including the CCG, Chinese survey vessels, and maritime militias. All in all, in the large body of water of the South China Sea, these maritime militias help to fill presence gaps of the CCG, collect intelligence, show the flag, and take action when and where needed.<sup>28</sup>

A further central element of China's grey zone approach is the manipulation of international law, an action which is often referred to as 'lawfare'. The PRC selectively interprets the United Nations Convention on the Law of the Sea (UNCLOS), which it has been party to since 1996, and other legal instruments to justify its expansive and

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<sup>25</sup> Maria Garcia Ribera, 'Little Blue Men: China & US Privateering', 16 April 2021, <https://greydynamics.com/little-blue-men-china-us-privateering/>.

<sup>26</sup> Gregory B. Poling, 'China's Military and Security Footprint in Southeast Asia and the Pacific Islands: China's Grey Zone Predations in the South China Sea'.

<sup>27</sup> Joseph Kristanto, 'Gray Hulls in the Gray Zone: Indonesia's Conundrum in the South China Sea – The Diplomat', 2 October 2024, <https://thediplomat.com/2024/10/gray-hulls-in-the-gray-zone-indonesias-conundrum-in-the-south-china-sea/>.

<sup>28</sup> Joseph Kristanto.



unjustified maritime claims, such as the 'ten-dash line'.<sup>29</sup> At the same time Beijing is 'cherry-picking' and disregarding unfavourable international rulings. In 2021, China passed the CCG law which vests the CCG with the authority to enforce jurisdiction in China's self-declared territorial waters while ignoring points of contention between the CCG law and UNCLOS. For example, in the media, its maritime neighbour the Philippines is displayed as the aggressor intruding Chinese territorial waters in the South China Sea enabling the PRC to maintain the moral high ground on the maritime territorial dispute. These selective interpretations of law and narrative posturing downplay the aggressive measures taken by Chinese vessels against, for example, Philippine vessels in its own EEZ. In the South China Sea, China is slowly establishing a de facto military and political authority over the area applying maritime grey zone tactics across a broad spectrum.

The situation around Taiwan looks slightly different. China's grey zone strategy and all domain pressure campaign against Taiwan in the maritime field centres among others on incremental territorial consolidation, legal-economic coercion, and intimidating, encroaching military exercises. Since 2022 and the dispatchment of a 6,6000-ton coast guard cutter to patrol the Taiwan strait, maritime grey zone measures are aimed to undermine Taipei's sovereignty and threaten its security.<sup>30</sup> So far, the PRC is not incorporating the 'Deceptive Blue Men' into its maritime pressure campaign against Taiwan. As the South China Sea and the Taiwan Strait are two vastly different theatres, it makes no strategic and operational sense for Beijing to use these grey zone militias around Taiwan where different aims are pursued. Here, the main aim is to intimidate Taiwanese leaders by power and authority, which the CCG possesses but the maritime militia not.

China's main lesson from Russia's war of aggression in Ukraine is that to continue its effective salami-slicing and grey zone tactics to achieve its aims is a smart decision. The Ukraine case clearly signals that conventional war brings high costs and

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<sup>29</sup> Thomas Lim and Eric Ang, 'Comparing Gray-Zone Tactics in the Red Sea and the South China Sea', 20 April 2024, <https://thediplomat.com/2024/04/comparing-gray-zone-tactics-in-the-red-sea-and-the-south-china-sea/>.

<sup>30</sup> Ryan D. Martinson, 'Missing in the Gray Zone? China's Maritime Militia Forces Around Taiwan', 24 December 2024, <https://thediplomat.com/2024/12/missing-in-the-gray-zone-chinas-maritime-militia-forces-around-taiwan/>.

has innately higher failure rates while grey zone operations are convincing in terms of economic, military and political utility as well as effectiveness. Thus, numerous academics and advisers anticipate a situation in which China will rather try to further endanger Taiwan's international standing through diplomatic, economic, and diverse military pressures.<sup>31</sup> A switch to an aerial and/or naval blockade could be a dangerous strategy for China as these actions might unintentionally or intentionally escalate the situation beyond the grey zone.<sup>32</sup>

### Comparative Analysis: Similarities and Differences

A comparative analysis of Russian and Chinese maritime grey zone activities reveals both similarities, but also important differences. Both states exploit gaps in international response mechanisms and both states employ a mix of military and non-military tools, including cyber capabilities, disinformation, and manipulation of international law. Also, both actors blend conventional and unconventional methods to achieve their strategic goals, rendering attribution and response for the states under attack difficult. Looking at the differences, Russia's approach is more overtly disruptive, is becoming more brazen, and shows an increasing intensity of malign activity.<sup>33</sup> The PRC relies on incremental territorial consolidation and invests heavily in lawfare, seeking to legitimise its actions through selective legal interpretations and diplomatic pressure. While Russia's operations are often hazardous and close to outright war, they are still designed to be deniable and difficult to attribute. China's actions are, on the contrary, frequently conducted in the open, albeit with enough ambiguity to complicate international responses. The table below compares both actors along different aspects relevant for an understanding of strategic aims, approaches, and tools.

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<sup>31</sup> Lowy Benjamin Herskovitch, 'Five One-Chinas: The Contest to Define Taiwan', Lowy Institute, 15 January 2025, <https://interactives.lowyinstitute.org/features/one-china-contest-to-define-taiwan/>.

<sup>32</sup> Tobias Burgers and Scott N. Romaniuk, 'China's Real Takeaway From the War in Ukraine: Grey Zone Conflict Is Best', 6 October 2022, <https://thediplomat.com/2022/10/chinas-real-takeaway-from-the-war-in-ukraine-grey-zone-conflict-is-best/>.

<sup>33</sup> Belén López Garrido, 'Playing With Fire: Are Russia's Hybrid Attacks the New European War?', EBU Investigative Journalism Network, 12 March 2025, <https://investigations.news-exchange.ebu.ch/playing-with-fire-are-russias-hybrid-attacks-the-new-european-war/>.

Aspect	Russia (Europe)	China (Indo-Pacific)
<b>Strategic Aim</b>	Destabilisation of NATO/ Europe, disruption of (maritime) infrastructure, undermining of Western support for Ukraine	Territorial claims, sovereignty assertion, establishment of regional hegemony, erosion of U.S. influence
<b>Operational Approach</b>	Episodic sabotage, high-impact hybrid naval warfare, high risk of escalation, military emphasis	Persistent maritime presence, incremental approach, economic coercion, use of lawfare, avoidance of direct military confrontation
<b>Tactical Tools</b>	Use of 'shadow fleets', sabotage of maritime infrastructure, mine-laying, GPS jamming, and covert disruption	Use of PLAN, CCG and maritime militia, use of blockades, harassment, swarming, ramming, militarisation of reefs, legal-economic coercion
<b>Legal Approach</b>	Exploitation of legal ambiguities, little use of lawfare	Use of lawfare to justify actions, moral high ground claims, invocation of maritime 'historic rights'
<b>Visibility of Actions</b>	Often overt, but deliberate impediment of attribution	Open and flagrant, but still ambiguous due to civilian vessels
<b>Use of Hybrid Warfare</b>	Prominent, including kinetic actions	Less kinetic, more ICAD, whole of nation approach using military, economic, and cultural resources
<b>Geopolitical Context</b>	European security, NATO	Indo-Pacific territorial disputes, establishment of regional hegemony

## Maritime countermeasures and responses

The differences in approaches and tools underscore the importance of tailored responses to each actor's grey zone strategy. Allied and partner responses to Russian and Chinese maritime grey zone tactics have included enhanced maritime domain awareness through satellite monitoring, vessel (through Automatic Identification Systems – AIS) tracking, and undersea cable surveillance. Multilateral cooperation has increased with joint patrols and exercises among NATO members as well as Indo-Pacific allies.

### Europe

To counter Russia's grey zone operations, the collective response from European countries as well as NATO has so far been diffident. Despite daily attacks, European leaders still exhibit restraint in their responses. Fears about an escalating conflict with Russia for which European states are not (yet) prepared seem to exist.<sup>34</sup> Russia's grey zone actions are clearly calibrated to test these limits while at the same time not to trigger a collective response from NATO under the Western Alliance's mutual defence provision (Article 5). Despite these restraints, NATO and Europe have launched some initiatives to fight the 'war in the shadows'. NATO and the EU have stepped up their cooperation on dealing with hybrid threats, with a special focus on cyber defence, enhanced resilience, strategic communications, improved situational awareness and exercises. NATO is also engaging with partners in the Indo-Pacific region to exchange experience on national approaches to countering hybrid threats, such as increased incidence of disinformation and cyberattacks.<sup>35</sup>

Ever since 2022, the Alliance is strengthening its "deterrence by denial" posture. It emphasises the need to proactively deter aggression by significantly increasing NATO's military presence e.g., in (Eastern) Europe and underscoring that any attack

<sup>34</sup> Laura Kayali et al., 'Europe Is under Attack from Russia. Why Isn't It Fighting Back?', POLITICO, 25 November 2024, <https://www.politico.eu/article/europe-russia-hybrid-war-vladimir-putin-germany-cyberattacks-election-interference/>.

<sup>35</sup> Belén López Garrido, 'Playing With Fire'.

will be met with a swift and robust response.<sup>36</sup> This posture has expanded in the hybrid space to encompass updated early warning systems against hybrid attacks, strengthened civil-military cooperation, and improved situational awareness in the cyber as well as maritime domains.<sup>37</sup>

Due to Russia's increasing and ever more aggressive maritime grey zone measures as well as due to its two new members Finland and Sweden, NATO's focus has also shifted towards the Baltic Sea (often nicknamed 'NATO's lake'). Already in 2023, instigated by the sabotage of the Nord Stream pipelines in 2022 and the damage to the Baltic connector gas pipeline in 2023, NATO established a new 'Undersea Infrastructure Coordination Cell' within NATO's Allied Maritime Command (MARCOM). The Cell's main aim is to coordinate allied activity, and to facilitate cooperation between military and the private industry, which owns much of the maritime infrastructure.<sup>38</sup>

Through the 2023 Digital Ocean Initiative, NATO is enhancing overall maritime awareness through data sharing with partners and industry. Within this framework, real-time shipping tracking, seabed mapping, and cyber tools connect navies, coast guards, and commercial operators in a shared operational picture.<sup>39</sup>

In January 2025, NATO announced plans to further enhance its military presence in the Baltic Sea. The new initiative, named Baltic Sentry, is aimed at strengthening the protection of critical undersea infrastructure. This mission involves a rotating group of maritime patrol aircraft and ships from NATO member countries, and all measures necessary to improve the ability to protect CIU and respond if required.

The European Commission and the EU High Representative for Foreign Affairs Kaja Kallas are planning additional measures on Russia's 'shadow fleet'. They aim to boost CUI resilience by enhancing cooperation, undersea repair capabilities,

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<sup>36</sup> Sean Monaghan et al., 'NATO's Role in Protecting Critical Undersea Infrastructure', 19 December 2023, <https://www.csis.org/analysis/natos-role-protecting-critical-undersea-infrastructure>.

<sup>37</sup> Klaudia Maciata, 'NATO Review - Fortifying the Baltic Sea - NATO's Defence and Deterrence Strategy for Hybrid Threats', 5 May 2025, <https://www.nato.int/docu/review/articles/2025/05/05/fortifying-the-baltic-sea-natos-defence-and-deterrence-strategy-for-hybrid-threats/index.html>.

<sup>38</sup> Klaudia Maciata.

<sup>39</sup> Christian Bueger, 'NATO's Contribution to Critical Maritime Infrastructure Protection - Center for Maritime Strategy', 19 January 2024, <https://centerformaritimestrategy.org/publications/natos-contribution-to-critical-maritime-infrastructure-protection/>.

information sharing, and detection technologies. Several European maritime authorities have agreed to cooperate inspecting suspected vessels passing through northern European waters. In another step, the UK-led Joint Expeditionary Force has initiated the Nordic Warden system to boost surveillance of the Russian shadow fleet and its activities.<sup>40</sup>

Significant gaps still exist in the legal protection of submarine communication cables. Aurel Sari from the European Centre of Excellence for Countering Hybrid Threats (Hybrid CoE) in Helsinki, Finland recommends that EU and NATO member states should exercise their prescriptive jurisdiction under UNCLOS in its entirety as legal ambiguities and difficulties in attribution hinder decisive action. Also, collaboration between different national authorities should be strengthened when exercising their enforcement powers next to an increased information sharing and collective attribution. Attribution usually comes, if at all, weeks or mostly months after investigations and the actual act of aggression.<sup>41</sup>

European governments are starting to show an increasing willingness to attribute acts of sabotage to Russia as the first step in fighting back and in making the antagonist pay a price. 'Aggressive behaviour has to have political costs',<sup>42</sup> underlined Arndt Freitag von Loringhoven (former NATO's chief of intelligence) exhibiting an 'ICAD-mindset': follow a clear messaging after attacks calling them for what they are and retaliate in an appropriate, proportional, and coordinated way making grey zone actions more costly to the perpetrators.<sup>43</sup>

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<sup>40</sup> Juraj Majcin, 'Battle of the Baltic: Safeguarding Critical Undersea Infrastructure', 22 April 2025, <https://www.epc.eu>.

<sup>41</sup> Aurel Sari, 'Hybrid CoE Research Report 14'.

<sup>42</sup> Laura Kayali et al., 'Europe Is under Attack from Russia. Why Isn't It Fighting Back?'

<sup>43</sup> Adam Lockyer, Yves-Heng Lim, and Courtney J. Fung, 'Moving beyond the Grey Zone'. Prashanth Parameswaran, 'Southeast Asia Maritime Security and Indo-Pacific Strategic Competition | Wilson Center', 13 March 2025, <https://gbv.wilsoncenter.org/article/southeast-asia-maritime-security-and-indo-pacific-strategic-competition>.

## ***Indo-Pacific***

Indo-Pacific states, particularly those facing Chinese maritime coercion, have also adopted a mix of legal, diplomatic, and security measures. For example, in 2023, the Association of Southeast Nations (ASEAN) launched its ASEAN maritime outlook (AMO). The AMO emphasises the need to overcome maritime challenges more sincerely than before. The current focus lies on improving cooperation among Member States and in upholding standards consistent with international law, including the United Nations Convention Law of the Sea (UNCLOS). To avoid ASEAN being drawn into power games between the United States and China, AMO defines the South China Sea conflicts as an internal regional affair seeking to prevent any interference of extra-regional powers (e.g., the United States). To solve these problems regionally, ASEAN aims to increase its Member States' maritime capabilities through technical and financial support. Regarding this capacity building work, clear potential for cooperation is seen between the EU and ASEAN due to their overlapping maritime security goals. This will help maintain a more multipolar stance while China's grey zone coercion is challenging the maritime order.<sup>44</sup>

Also in 2023, the Quadrilateral Dialogue (Quad) passed a resolution to support the regional 'Quad Partnership for Cable Connectivity and Resilience' to strengthen cable systems in the Indo-Pacific region by drawing on international expertise in manufacturing, delivering, and maintaining cable infrastructure. This initiative joins public and private sector actors to address gaps in the infrastructure and coordinate future cable routing, building as well as operations.<sup>45</sup> The creation of a network of legal instruments is nonetheless still needed to provide transnational protection for cables crossing through different nations and jurisdictions, which is currently lacking in international law.<sup>46</sup>

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<sup>44</sup> Prashanth Parameswaran, 'Southeast Asia Maritime Security and Indo-Pacific Strategic Competition | Wilson Center', 13 March 2025, <https://gbv.wilsoncenter.org/article/southeast-asia-maritime-security-and-indo-pacific-strategic-competition>.

<sup>45</sup> Cannon and Bhatt, 'The Quad and Submarine Cable Protection in the Indo-Pacific'.

<sup>46</sup> Ganesh Sahathevan and Prakash Panneerselvam, 'Needed, a Framework to Protect Undersea Cables', Institute for Security and Development Policy (blog), 4 March 2024, <https://www.isdp.eu/publication/needed-a-framework-to-protect-undersea-cables/>.

Looking at countermeasures by individual actors, the United States carries out Freedom of Navigation operations (FONOPs) on a semi-routine basis in the South China Sea and on occasion publicises such operations. Moreover, the United States has utilised maritime counterinsurgency (COIN) operations, employing U.S. Navy assets to provide close overwatch of CCG and maritime militia vessels that have been e.g., directly harassing lawful oil exploration in the Malaysian EEZ. Nevertheless, the subsequent utilisation of this kind of operation has been restricted. The future adoption of a more extensive COIN model is regarded as a means of mitigating the potential for China to conduct operations in the grey zone.<sup>47</sup>

To give further examples for grey zone countermeasures in the Indo-Pacific, the Philippines have responded to Chinese grey zone aggression by initiating new security partnerships with Vietnam, Japan, and Australia. By publicly attributing PRC actions, the Philippines and their partners counter Chinese ICAD activities with alternative narratives and legal measures. The new maritime security partnerships are part of the 'Comprehensive Archipelagic Defense Concept' (CADC), adopted by the Philippines in January 2024. It aims to project the country's military power within its 200-nautical-mile EEZ. It shall strengthen the Philippines' diplomatic and strategic posture vis-à-vis the illegal and unilateral encroachment of its maritime territory in the West Philippine Sea (part of the Southeast Asian Sea, called South China Sea by the PRC).<sup>48</sup> This new approach by the Marcos Jr. administration has led to a 'counter grey-zone modus operandi', which we do not only see in the Indo-Pacific but also, e.g., in the Red Sea. These counter grey zone steps include a) an assessment of grey-zone aggression, b) the development of alternative narratives, and c) the cooperation with like-minded countries with similar security considerations. The aim is to develop coordinated international responses across different levels, institutions, and actors.<sup>49</sup> In the Indo-Pacific, the Philippines is the country with the best developed strategy to counter the PRC's ICAD actions. Despite being a weaker power vis-à-vis the PRC, it demonstrates a resolute commitment to its transparency initiatives, which publicises

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<sup>47</sup> Todd C. Helmus et al., *Understanding and Countering China's Maritime Gray Zone Operations* (RAND Corporation, 2024), <https://doi.org/10.7249/RR2954-1>.

<sup>48</sup> Renato Cruz de Castro, 'Strategic Shift in Philippine Defense: From the Aquino to the Marcos Administration', Friedrich Naumann Foundation Analysis (Potsdam, November 2024).

<sup>49</sup> Thomas Lim and Eric Ang, 'Comparing Gray-Zone Tactics in the Red Sea and the South China Sea'.



China's aggressive maritime actions. The underlying hope is that this increased visibility will result in a negative impact on China's international reputation, thereby pressuring the government in Beijing to recalibrate its actions in the region.<sup>50</sup>

To sum up, faced with China's increasingly assertive tactics, neighbouring states and allied nations have begun working on responses aimed at countering these grey zone operations. Countermeasures such as deploying diplomatic avenues and non-lethal weapons, strengthening maritime alliances, deploying light naval forces, and adopting similar tactics like the PRC, are either being already put into practice or are being explored and established.<sup>51</sup>

## Conclusion

Russia and China's maritime grey zone activities represent sophisticated, evolving challenges to international maritime security. Russia's approach is disruptive and kinetic, focused on covert sabotage and hybrid naval warfare in Europe, while China pursues incremental, coercive territorial consolidation in the Indo-Pacific through a formalised maritime militia and legal-economic pressure.

Both Europe and Indo-Pacific states have shifted from hesitant, fragmented responses to successively more coordinated and assertive countermeasures against maritime grey zone tactics. NATO's Baltic Sentry programme exemplifies Europe's new approach, combining persistent military presence with legal and technical measures. In the Indo-Pacific, ASEAN and key regional states focus on capacity building, legal frameworks, and strategic partnerships to counter China's coercion. However, both regions continue to face challenges related to attribution, legal ambiguity, and the evolving nature of grey zone threats.

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<sup>50</sup> Markus Garlauskas, 'Dispatch from Manila: On the Frontlines of the "Gray Zone" Conflict with China - Atlantic Council'.

<sup>51</sup> Shadi Abdelwahab, 'Grey Zone Operations Responding to the Escalating Threats to Maritime Security - Aljundi Journal - A Military & Cultural Monthly Magazine'; Prashanth Parameswaran, 'Southeast Asia Maritime Security and Indo-Pacific Strategic Competition | Wilson Center'.

The comprehension of the differences in grey zone activities in Europe and the Indo-Pacific, and their strategic ramifications facilitates the development of tailored countermeasures. Strengthening multilateral cooperation, legal frameworks, and maritime domain awareness is essential to uphold international law and maintain regional stability in the face of grey zone threats. Furthermore, it is imperative that clear definitions are established for the activities that constitute the 'war in the shadows'. The critical and precise ICAD framework used in the Indo-Pacific is one attempt to remove the ambiguity of the broader grey zone term, which might impede countermeasures.

Despite the ongoing efforts in both Europe and the Indo-Pacific, numerous challenges persist. The presence of legal ambiguities and difficulties in attribution has been demonstrated to have a detrimental effect on the ability to take decisive action. The fragmentation of policies and the limited interoperability of systems have been identified as key factors that impede the effectiveness of responses to these crises. Furthermore, the incremental and deniable nature of grey zone tactics complicates traditional deterrence. The development of a unified strategic framework, encompassing diplomatic, economic, legal, and military instruments, is imperative to enhance coherence and efficacy. The timely detection and accurate attribution of threats requires enhanced intelligence sharing and real-time coordination among allies and partners. In order to counteract grey zone tactics, the international community must work to provide coordinated and nuanced responses. Such responses must include unified responses, investment in maritime security, and the strengthening of international law.

## About the Author

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# FROM STRATEGIC AMBIGUITY TO FUNCTIONAL ALIGNMENT: EVOLVING EU-ROK MARITIME SECURITY COOPERATION IN THE INDO-PACIFIC

*Jason Cox*

## Executive Summary

This paper examines the evolving maritime partnership between the European Union (EU) and the Republic of Korea (ROK) in the context of increasing instability in the Indo-Pacific region. Although the two actors differ in geography, force posture, and strategic culture, they share core interests in safeguarding sea lines of communication, upholding a rules-based maritime order, and promoting multilateral cooperation. Recent geopolitical developments – including China's maritime assertiveness, the spread of U.S.-led mini-lateral frameworks, and the global implications of Russia's war in Ukraine – have accelerated normative convergence and functional alignment between Brussels and Seoul.

The paper argues that EU-ROK maritime cooperation is gradually developing not through formal alliances, but through targeted, politically feasible engagement in areas such as maritime domain awareness (MDA), humanitarian assistance and disaster relief (HADR), naval maintenance and repair (MRO), and institutional coordination. These efforts reflect a form of adaptive middle-power diplomacy: layered, issue-specific cooperation that reinforces maritime norms without provoking confrontation.

Although logistical, strategic, and institutional constraints remain, functional coordination offers a pragmatic path forward. By focusing on operationally feasible areas of cooperation, the EU and ROK can enhance maritime resilience, influence regional norms, and contribute to building a more diverse Indo-Pacific security architecture beyond the binary of U.S.–China rivalry.

## 1. Introduction

As strategic rivalry intensifies in the Indo-Pacific, maritime security has emerged as a crucial arena for contestation, cooperation, and the reinforcement of norms. While great powers continue to dominate much of the narrative, middle powers such as the European Union (EU) and the Republic of Korea (ROK) are beginning to shape the maritime order in more subtle but increasingly consequential ways. Both actors have revealed strategies for the Indo-Pacific in recent years. Despite apparent differences in geography, naval posture, and alliance commitments, they share a deep normative commitment to international law, freedom of navigation, and multilateral engagement. These shared values, combined with mounting regional instability and the erosion of legal norms, create space for a distinctive form of maritime partnership – one that addresses functional and normative gaps left by more militarised or fragmented great-power engagements.

This paper argues that the EU and ROK are undergoing a gradual yet tangible shift from rhetorical alignment to operational convergence in the maritime sphere. Instead of pursuing a formal alliance or comprehensive strategic partnership, both actors invest in functional, issue-specific initiatives such as maritime domain awareness (MDA), humanitarian assistance and disaster relief (HADR), and naval maintenance and repair. These efforts exemplify a form of adaptive middle-power diplomacy – layered, flexible, and aimed at reinforcing the rules-based maritime order without provoking confrontation. In an era characterised by grey-zone competition and contested norms, EU-ROK cooperation provides a pragmatic model for promoting rules through resilience, presence, and technical interoperability.

The analysis proceeds in four parts. First, it highlights the strategic relevance of the Indo-Pacific region to the EU and the ROK, particularly in terms of trade flows, legal norms, and emerging security threats. Second, it examines the primary drivers of maritime convergence, including China's assertiveness, U.S.-led mini-lateral frameworks, and the global repercussions of Russia's war in Ukraine. Third, it assesses the main structural and institutional constraints to deeper cooperation, from geographic asymmetries to strategic caution vis-à-vis China. Ultimately, it presents practical policy pathways for advancing EU-ROK coordination, arguing that targeted, value-based cooperation offers the most viable and mutually beneficial approach in the current environment.

## 2. Strategic Context: Why The Indo-Pacific Matters

The Indo-Pacific has become the geopolitical epicentre of the 21st century, reshaping the strategic calculus of regional actors and external stakeholders such as the EU and the ROK. As the world's primary conduit for maritime trade and energy flows, the region includes some of the most vital sea lines of communication (SLOCs), notably the Strait of Malacca, the South China Sea, and the East China Sea. Over 40% of the EU's external trade transits these waters, while the ROK's export-dependent economy remains especially vulnerable to regional instability and coercive maritime behaviour.<sup>1</sup> Therefore, maritime security in the Indo-Pacific is not a peripheral concern for either actor – it is a strategic imperative.

The priority has been formalised in national strategies. The ROK's 2022 Indo-Pacific Strategy marked a decisive shift away from strategic ambiguity, declaring that the ROK is an Indo-Pacific nation with vital interests linked to regional peace and stability.<sup>2</sup> Similarly, the EU's 2021 Indo-Pacific Strategy, reaffirmed in its 2023 revision of the Maritime Security Strategy, positions the Indo-Pacific at the centre of Europe's external action, trade, and security outlook.<sup>3</sup> The EU has explicitly acknowledged that its prosperity depends on free and open access to Indo-Pacific maritime trade routes. As a leading EU member, Germany has reinforced this strategic stance through naval deployments and ministerial messaging. As Germany's Defence Minister emphasised in 2024, *'looking the other way, showing no presence in the Indo-Pacific in support of the international rules-based order, that's not an option for Germany.'*<sup>4</sup>

<sup>1</sup> Jihoon Yu, "Strengthening the ROK-EU Indo-Pacific Maritime Security Partnership," in Maritime Security for Resilient Global Supply Chains in the Wider Indo-Pacific, Hague Centre for Strategic Studies (2024), 2–3.

<sup>2</sup> Ministry of Foreign Affairs (ROK), Strategy for a Free, Peaceful, and Prosperous Indo-Pacific Region, December 2022, [https://www.mofa.go.kr/eng/wpge/m\\_26382/contents.do](https://www.mofa.go.kr/eng/wpge/m_26382/contents.do).

<sup>3</sup> European Commission and High Representative of the Union for Foreign Affairs and Security Policy. Joint Communication to the European Parliament and the Council: Update of the EU Maritime Security Strategy and Its Action Plan—An Enhanced EU Maritime Security Strategy for Evolving Maritime Threats. JOIN(2023) 8 final, March 10, 2023. [https://oceans-and-fisheries.ec.europa.eu/publications/joint-communication-update-eu-maritime-security-strategy-and-its-action-plan-enhanced-eu-maritime\\_en](https://oceans-and-fisheries.ec.europa.eu/publications/joint-communication-update-eu-maritime-security-strategy-and-its-action-plan-enhanced-eu-maritime_en).

<sup>4</sup> Boris Pistorius, quoted in Sarah Marsh, "German Navy Heads to Indo-Pacific with Frigate and Supply Ship," Reuters, May 7, 2024, <https://www.reuters.com/world/german-navy-heads-indo-pacific-with-frigate-supply-ship-2024-05-07/>.

The convergence of traditional and non-traditional threats amplifies the region's significance. China's assertive naval modernisation and increasingly provocative actions in disputed waters, North Korea's evolving missile capabilities – including submarine-launched ballistic missiles – and the proliferation of non-state threats such as piracy, illegal fishing, and maritime terrorism all contribute to a deepening sense of insecurity.<sup>5</sup> While the EU does not face immediate military threats in the region, it has growing interests in upholding a rules-based maritime order and safeguarding global commerce. Meanwhile, the ROK's proximity to flashpoints such as the Taiwan Strait (and those on the Korean Peninsula) places it at the forefront of any significant escalation, emphasising the maritime domain as a national security priority.<sup>6</sup>

Despite differences in force posture and regional reach, the EU and ROK share a normative commitment to multilateral maritime governance and the rules-based international order. This is reflected in the EU's strong support for international law – particularly the United Nations Convention on the Law of the Sea (UNCLOS) and of freedom of navigation (FON) – and in the ROK's growing alignment with regional security norms and legal frameworks.<sup>7</sup> Both have articulated Indo-Pacific strategies that emphasise these values, signalling a growing sense of strategic responsibility. The EU's 2021 strategy frames the region as a theatre for sustainable connectivity and legal order, while the ROK's 2022 strategy marks a departure from earlier ambiguity by identifying maritime security and capacity-building as national priorities.<sup>8</sup> This normative convergence lays the groundwork for practical cooperation, even if broader strategic integration remains limited.

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<sup>5</sup> Yu, Strengthening the ROK-EU, 3–5; Giulio Pugliese, The European Union and an “Indo-Pacific” Alignment, *Asia-Pacific Review* 31, no. 1 (2024): 21–23.

<sup>6</sup> Yu, Strengthening the ROK-EU, 4–5.

<sup>7</sup> Christian Bueger and Tim Edmunds, The EU Quest to Become a Global Maritime-Security Provider: Strategy, Capacity, and Legitimacy, Policy Brief 2023/02 (Brussels: EU Institute for Security Studies, 2023), 4–6; Yu, Strengthening the ROK-EU, 2–3, 5.

<sup>8</sup> Yu, Strengthening the ROK-EU, 6–7; Giulio Pugliese, “The EU Security Intervention in the Indo-Pacific: Between Multilateralism and Mercantile Interests,” *Journal of Intervention and Statebuilding* 16, no. 1 (2022): 76–93.



This alignment can be understood through the lens of middle-power diplomacy. Lacking global military dominance, both the EU and the ROK project influence by promoting international norms, engaging in institutional leadership, and participating in issue-specific coalitions. For the ROK, cooperation with the EU offers a means of enhancing strategic autonomy without antagonising China or undermining its alliance with the United States. For the EU, partnerships with capable regional actors such as the ROK enable it to advance Indo-Pacific objectives without overextending its limited naval capabilities. Rather than directly counterbalancing dominant powers, EU-ROK maritime engagement complements existing alliances by reinforcing normative and institutional frameworks and stabilising contested waters through soft deterrence and capacity-building, while remaining sensitive to how even low-visibility actions may be perceived in competitive maritime environments. While symbolic presence – such as joint port calls, HADR exercises, or ceremonial transits – signals solidarity and shared values, soft deterrence operates through more strategic channels: initiatives like maritime domain awareness, sanctions enforcement, or legal patrols that aim to constrain revisionist behaviour by increasing visibility, shaping reputational costs, and reinforcing norms without resorting to force. In this sense, the Indo-Pacific is not only a theatre of contestation – it is also a laboratory for creative diplomacy among like-minded actors navigating an increasingly fragmented international order.

### 3. Drivers Of Convergence

Although the EU and the ROK differ in geography, strategic focus, and military posture, recent developments have accelerated their alignment in the Indo-Pacific maritime arena. Chief among these is China's increasingly assertive behaviour in regional waters, which has triggered strategic recalibration by both actors. Beijing's rapid naval modernisation, coercive tactics in the South and East China Seas, and expansive maritime claims have heightened tensions with both neighbouring and external stakeholders.<sup>9</sup> While the EU previously engaged with China mainly through

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<sup>9</sup> Yu, Strengthening the ROK-EU, 3–5.

economic cooperation and soft-power diplomacy, recent events – including Beijing’s maritime behaviour and its tacit support for Russia’s war in Ukraine – have prompted Brussels to reframe China as a ‘systemic rival.’<sup>10</sup> For the ROK, China has long posed a strategic dilemma: a major trading partner whose maritime conduct challenges core principles of sovereignty and freedom of navigation.<sup>11</sup> Within this shared context, maritime cooperation offers a politically viable platform for signalling normative alignment without crossing red lines in hard-security matters. This platform provides a low-risk opportunity for both actors to demonstrate shared values while managing economic and diplomatic sensitivities.

This recalibration is increasingly visible in operational practice. In 2024, a German frigate FGS *Baden-Württemberg* sailed through the Taiwan Strait following joint exercises with the ROK Navy. German officials framed the deployment as a deliberate signal of resolve in response to China’s growing assertiveness in contested waters.<sup>12</sup> Such missions highlight Europe’s increasing willingness to project a symbolic presence and cooperate with Asian partners on the basis of shared maritime norms.

A second driver of convergence stems from the shifting influence of the United States and the reconfiguration of its alliance architecture in the Indo-Pacific. The proliferation of mini-lateral arrangements – such as the Quad, AUKUS, and a range of trilateral dialogues – has increased pressure on partners like the EU and ROK to clarify their strategic posture.<sup>13</sup> Washington actively encouraged closer coordination among its allies, including through the 2023 Camp David summit, which established a trilateral maritime security cooperation framework between the United States, Japan, and the ROK.<sup>14</sup> For the EU, aligning more closely with U.S. Indo-Pacific objectives

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<sup>10</sup> Pugliese, EU Security Intervention, 77–79.

<sup>11</sup> Yu, Strengthening the ROK–EU, 4, 8–9.

<sup>12</sup> Naval News, “German Navy Concludes Indo-Pacific Deployment 2024,” Dec. 2024. <https://www.navalnews.com/naval-news/2024/12/german-navy-wraps-indopacific-deployment-a-naval-news-assessment/>

<sup>13</sup> Pugliese, The European Union and an “Indo-Pacific” Alignment, 25–26

<sup>14</sup> Andrew Yeo and Terence Roehrig, South Korea and the Trilateral Maritime Order (2022), 10–11; White House, Fact Sheet: The Trilateral Leaders’ Summit at Camp David, August 18, 2023, <https://www.whitehouse.gov/briefing-room/statements-releases/2023/08/18/fact-sheet-the-trilateral-leaders-summit-at-camp-david/>

signals transatlantic solidarity and strategic commitment. For the ROK, expanding its partnerships to include actors such as the EU enables a form of strategic hedging, allowing it to enhance autonomy without alienating the United States or antagonising China.<sup>15</sup> Excluded from AUKUS and not a formal member of the Quad, both Brussels and Seoul have found in each other a flexible, like-minded partner through which to pursue complementary cooperation that reinforces the rules-based order without formal alliance commitments.<sup>16</sup> These overlapping incentives – especially their shared outsider status within U.S.-led frameworks – create fertile ground for functional cooperation in maritime domains that do not entail binding defence obligations.

A third and more recent catalyst for convergence has been the war in Ukraine. Russia's invasion not only shattered assumptions about the post-Cold War European security order but also highlighted the global challenge posed by authoritarian revisionism. In response, the EU accelerated its strategic posture, including increased engagement in the Indo-Pacific.<sup>17</sup> Meanwhile, the ROK's vocal support for Ukraine – such as its participation in sanctions and alignment with G7 positions – signalled a departure from its traditionally cautious stance on extra-regional affairs.<sup>18</sup> Although Ukraine has not directly reshaped EU-ROK maritime engagement, it has served as a normative inflexion point. By reinforcing shared liberal-democratic values and exposing the fragility of the international order, it created greater political space and legitimacy for cooperation in adjacent contested regions such as the Indo-Pacific. This normative convergence has also materialised in concrete ways. For example, the ROK has become a key arms supplier to Europe, signing large-scale defence contracts with NATO allies such as Poland for K2 tanks, K9 howitzers, and

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<sup>15</sup> Pham Thi Yen, "South Korea and the Indo-Pacific Strategy: From Strategic Ambiguity to Strategic Autonomy," *Journal of Liberty and International Affairs* 9, no. 3 (2023): 477–483.

<sup>16</sup> Centre for Security, Diplomacy and Strategy (CSDS), *The EU's Indo-Pacific Strategy: Prospects for Cooperation with South Korea*, Brussels School of Governance, 2022, <https://brussels-school.be/publications/policy-briefs/eus-indo-pacific-strategy-prospects-cooperation-south-korea>; CSDS, *Korea–EU Cooperation: Moving to the Next Level*, Brussels School of Governance, 2022, <https://brussels-school.be/publications/other/korea-eu-cooperation-moving-next-level>.

<sup>17</sup> Pugliese, *Indo-Pacific Alignment*, 20–24.

<sup>18</sup> Yu, *Strengthening the ROK–EU*, 9–10.

K239 rocket launcher systems.<sup>19</sup> In this context, shared concerns over global order and authoritarian expansion have lent new legitimacy and momentum to EU-ROK cooperation – if not through formal alliances, then through layered, interest-based maritime partnerships.

#### 4. Barriers To Deeper Eu-Rok Maritime Cooperation

Despite growing normative alignment and overlapping interests, the EU and the ROK continue to face strategic, logistical, and institutional constraints that restrict the depth and long-term viability of their maritime security cooperation. These issues do not arise from political misalignment but instead from structural divergences in geography, threat perception, and policy frameworks.

Strategically, the EU and ROK operate within distinct security ecosystems. The ROK remains deeply embedded in the U.S.-led alliance structure in Northeast Asia, which continues to influence its defence priorities, procurement decisions, and diplomatic efforts.<sup>20</sup> In contrast, the EU's strategic posture emphasises multilateral engagement, normative influence, and inclusive regionalism.<sup>21</sup> This divergence creates friction: while the ROK concentrates on immediate threats, such as North Korean provocations or potential Taiwan contingencies, the EU tends to approach maritime security through a broader, rule-based lens, which often minimises confrontation.<sup>22</sup> Although both actors endorse the principle of a rules-based maritime order, they do so from different vantage points and with varying degrees of urgency.

This divergence is also influenced by resource and geographic constraints. While the war in Ukraine has diverted European military attention and strained defence

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<sup>19</sup> YONHAP News Agency, "Poland to Buy More K2 Tanks and K9 Howitzers in \$6.2B Deal," March 9, 2025, <https://m-en.yna.co.kr/view/AEN20250309001800320>; Hanwha Aerospace, "Hanwha Aerospace Signs Contract to Supply K239 Chunmoo Launchers to Poland," October 19, 2022, <https://m.hanwhaaerospace.com/eng/media/newsroom/view.do?seq=300>.

<sup>20</sup> Yeo and Roehrig, *Trilateral Maritime Order*, 8–9.

<sup>21</sup> Pugliese, *Indo-Pacific Alignment*, 11–13.

<sup>22</sup> Yu, *Strengthening the ROK-EU*, 8–10.

resources, it has paradoxically also highlighted the urgency of maintaining stability in the Indo-Pacific, reinforcing the region's relevance to Europe's broader strategic outlook.<sup>23</sup> The ROK, meanwhile, must balance outward engagement with its ongoing priority of deterring North Korean aggression. These constraints influence not only priorities but also capabilities for sustained coordination.

Logistical and operational limitations further complicate efforts at sustained maritime coordination. The EU lacks forward-deployed naval infrastructure in East Asia and relies on episodic deployments and port calls by individual Member States such as France or Germany.<sup>24</sup> While the frequency of such missions is increasing, they can be characterised as largely symbolic and rotational, lacking the infrastructure to support long-term operational engagement. During its 2024 Indo-Pacific deployment, for example, Germany's task group conducted high-visibility port visits and joint drills with the ROK. Still, it remained dependent on external logistics and returned to Europe upon completion.<sup>25</sup> The ROK's naval forces – while advanced within their near seas – are not structured for long-range, multilateral deployments with distant partners.<sup>26</sup> Previous cooperation off the Horn of Africa – while meaningful – has mainly remained ad hoc and issue-specific, falling short of establishing institutional frameworks that could be effectively applied to the Indo-Pacific theatre.<sup>27</sup> The memory of joint operations exists, but the machinery to replicate them elsewhere does not. As a result, much of the current engagement remains ad hoc, episodic, and limited in scope.

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<sup>23</sup> The Economist, "Reinventing the Indo-Pacific," Jan. 2023. <https://www.economist.com/asia/2023/01/04/reinventing-the-indo-pacific>

<sup>24</sup> Council of the European Union. *Revised EU Maritime Security Strategy and Action Plan*. Brussels: Council of the EU, 24 October 2023, 7.

<sup>25</sup> Alex Luck, "German Navy Wraps Indopacific Deployment – A Naval News Assessment," *Naval News*, December 10, 2024, <https://www.navalnews.com/naval-news/2024/12/german-navy-wraps-indopacific-deployment-a-naval-news-assessment/>.

<sup>26</sup> Yu, *Strengthening the ROK-EU*, 10.

<sup>27</sup> Emilia Columbo, U.S.–ROK Ties: *Enhancing Collaboration on Maritime Security in Africa*, Center for Strategic and International Studies (CSIS), March 2023.

Perhaps most critically, both actors face delicate balancing acts in their relationships with China. The ROK's economic interdependence with China – its largest trading partner – imposes natural limits on its willingness to pursue security initiatives that could be perceived as antagonistic.<sup>28</sup> This caution is reflected in Seoul's limited participation in Quad-related initiatives and its reluctance to frame its Indo-Pacific strategy in overtly strategic or military terms. The EU faces a parallel challenge: internal divisions among Member States – particularly between France's proactive Indo-Pacific agenda and Germany's more trade-oriented posture – continue to hinder a unified policy on China.<sup>29</sup> These constraints, though different in form, produce a shared hesitancy to expand maritime cooperation beyond low-visibility, low-risk domains.

Institutionally, the absence of robust bilateral mechanisms between the EU and ROK also hampers deeper engagement. While the two sides have signed a Strategic Partnership Agreement, they lack the kind of dedicated maritime security frameworks present in the EU's arrangements with Japan or Australia.<sup>30</sup> Bureaucratic fragmentation on both sides – across economic, diplomatic, and defence portfolios – further slows progress. Additionally, the ROK's Indo-Pacific engagement remains relatively nascent, and its capacity for multi-theatre coordination remains constrained by persistent tensions on the Korean Peninsula.<sup>31</sup> These structural limitations have been further compounded by recent political instability in Seoul. The declaration of martial law by President Yoon and his subsequent impeachment have raised concerns about the continuity of civilian oversight and have undermined the normative credibility that underpins Korea's middle-power diplomacy.<sup>32</sup> For

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<sup>28</sup> Yen, *Strategic Autonomy*, 8–9.

<sup>29</sup> Pugliese, *Indo-Pacific Alignment*, 25, 31.

<sup>30</sup> Yu, Strengthening the ROK-EU, 11; Jagannath Panda and Richard Ghiasy, Navigating the Indo Pacific: How Australia and the EU Can Partner for Peace, Stability, and Prosperity, Policy Brief (Institute for Security & Development Policy, September 6, 2024), <https://www.isdp.eu/publication/navigating-the-indo-pacific-how-australia-and-the-eu-can-partner-for-peace-stability-and-prosperity/>; Council of the European Union, Australia and the European Union Commit to Security and Defence Partnership, press release, June 17, 2025, <https://www.consilium.europa.eu/en/press/press-releases/2025/06/17/australia-and-the-european-union-committing-to-security-and-defence-partnership/>.

<sup>31</sup> Ibid, 10.

<sup>32</sup> Alexander Lipke, "Turmoil in Seoul: A Potential Setback for EU–South Korea Security Cooperation," European Council on Foreign Relations, January 12, 2025, <https://ecfr.eu/article/turmoil-in-seoul-a-potential-setback-for-eu-south-korea-security-cooperation/>.

the EU – an actor that foregrounds the rule of law and democratic legitimacy in its external partnerships – such developments may prompt caution or delay in expanding cooperation. In this context, even well-intentioned initiatives often stall at the level of joint declarations or episodic dialogues, failing to translate into long-term cooperation.

## 5. Pathways Forward: Practical And Political Opportunities

Although strategic divergence and structural constraints remain, the EU and the ROK bring mutually reinforcing strengths to a layered and pragmatic approach to maritime cooperation. This synergy is not merely theoretical but evident in functional domains: the EU's investment in maritime information fusion platforms, such as CRIMARIO II, aligns with the ROK's advanced naval surveillance systems. Meanwhile, the ROK's globally competitive shipbuilding industry can integrate with EU naval technologies to support shared logistics and repair capabilities. Instead of aiming for a comprehensive alliance or a formal security pact, both parties are better served by focusing on issue-specific initiatives that build trust, reinforce their commitment to a rules-based order, and improve operational interoperability – without provoking geopolitical backlash.

One promising approach is expanding joint exercises and coordination in low-risk maritime security domains. Humanitarian assistance and disaster relief (HADR), counter-piracy patrols, maritime search and rescue operations, and anti-smuggling efforts all provide politically feasible and strategically relevant platforms for cooperation.<sup>33</sup> These activities offer opportunities for training, interoperability, and symbolic presence, without implying direct military alignment against China or other regional actors. The Gulf of Aden, where both the EU and ROK have participated in anti-piracy missions, sets a valuable precedent for adaptation in Southeast Asia or the Western Pacific.<sup>34</sup> While such operations may appear largely symbolic, they serve as strategic enablers – embedding cooperative norms, enhancing mutual familiarity, and reinforcing preparedness for complex maritime contingencies. In

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<sup>33</sup> Yu, *Strengthening the ROK-EU*, 11–12.

<sup>34</sup> Colombo, *EU-ROK Maritime Coordination*, 3–5.

this sense, symbolic presence lays the groundwork for trust and visibility, while soft deterrence is achieved through operational activities, such as surveillance and norm enforcement, which quietly impose reputational costs on violators and reinforce maritime order without coercion.

In a modest but significant shift, EU-ROK joint naval operations have evolved to include active enforcement of international norms. As part of the same 2024 Indo-Pacific deployment discussed earlier, a German frigate joined ROK forces to monitor North Korean shipping activity violating UN sanctions.<sup>35</sup> Although limited in scale, these operations demonstrate a growing willingness to project collective responsibility for maritime rules enforcement in the Indo-Pacific, albeit within a narrow scope and constrained by political caution.

Maritime Domain Awareness (MDA) presents another tangible area for collaboration. By integrating satellite imagery, vessel tracking, and surveillance data, the EU and ROK can improve shared situational awareness over key SLOCs.<sup>36</sup> Enhanced MDA would bolster coordination on illegal, unreported, and unregulated (IUU) fishing, maritime trafficking, and grey-zone activities – issues that resonate across both Northeast and Southeast Asia. These efforts also align with EU initiatives, such as CRIMARIO II and SafeSeaNet, which promote maritime information fusion and incident reporting, as well as the ROK's investment in coastal radar and naval surveillance infrastructure.<sup>37</sup> Strengthening MDA not only advances regional maritime governance but also creates space for technical cooperation in areas of strategic ambiguity.

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<sup>35</sup> Bundeswehr, "The German Navy and the UN's North Korea Sanctions," September 2024, <https://www.bundeswehr.de/en/organization/navy/news/german-navy-united-nations-north-korea-sanctions-5836662>.

<sup>36</sup> Yu, *Strengthening the ROK-EU*, 12–13.

<sup>37</sup> Pugliese, *Indo-Pacific Alignment*, 13–14; CRIMARIO II, "Interconnecting the Indo-Pacific," accessed May 2025, <https://www.crimario.eu/>; European Maritime Safety Agency, "SafeSeaNet," accessed May 2025, <https://www.emsa.europa.eu/ssn-main.html>; Defense Mirror, "South Korea Deploys Upgraded Coastal Radar Systems," August 2024, [https://www.defensemirror.com/news/37728/South\\_Korea\\_Deploys\\_Upgraded\\_Coastal\\_Radar\\_Systems](https://www.defensemirror.com/news/37728/South_Korea_Deploys_Upgraded_Coastal_Radar_Systems); UPI, "South Korea Develops New Maritime Surveillance Radar," October 30, 2019, [https://www.upi.com/Top\\_News/World-News/2019/10/30/South-Korea-develops-new-maritime-surveillance-radar-for-ships-aircraft/3551572450288/](https://www.upi.com/Top_News/World-News/2019/10/30/South-Korea-develops-new-maritime-surveillance-radar-for-ships-aircraft/3551572450288/)



A third area of untapped potential lies in maritime defence industry collaboration, particularly in Maintenance, Repair, and Overhaul (MRO) operations. The ROK's globally competitive shipbuilding and repair facilities, combined with the EU's technological strengths in naval engineering and sensors, present opportunities for joint MRO projects or shared logistics support, whether bilaterally or via third-party ports.<sup>38</sup> ROK ports have provided logistical support to German naval vessels during Indo-Pacific rotations, offering a real-world template for extended operational cooperation.<sup>39</sup> While more politically sensitive than HADR or MDA, such arrangements avoid overt defence alignments, thereby enhancing maritime resilience and industrial interdependence.

Ultimately, both actors can enhance their strategic influence by coordinating their engagement in multilateral forums. As active participants in the ASEAN Regional Forum (ARF), East Asia Summit (EAS), and Indian Ocean Rim Association (IORA), the EU and ROK are well positioned to co-chair working groups or launch joint initiatives – especially in close consultation with regional stakeholders – to ensure that cooperation is perceived as supportive and inclusive rather than externally driven or prescriptive. While some Southeast Asian actors may welcome external support in capacity-building and governance, others may remain wary of perceived agenda-setting by extra-regional powers. This ASEAN-sensitive approach enhances legitimacy and encourages joint ownership of regional maritime governance efforts. Relevant initiatives may include climate security, maritime capacity-building, and the implementation of UNCLOS.<sup>40</sup> This form of institutional entrepreneurship involves minimal geopolitical risk, allowing both actors to shape the Indo-Pacific agenda in a constructive, rules-based manner. It also enables the EU to extend its diplomatic influence while reinforcing the ROK's ambitions for greater global impact.

Taken together, these pathways indicate that the EU-ROK maritime partnership should not be judged by the extent of its defence integration, but by its ability to foster adaptable, practical cooperation. Such targeted engagement – anchored in

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<sup>38</sup> Pugliese, *Indo-Pacific Alignment*, 19; Yu, *Strengthening the ROK-EU*, 13.

<sup>39</sup> Yonhap News, “(Yonhap Interview) Germany's Indo-Pacific deployment shows commitment to rules-based order,” Oct. 2024. <https://en.yna.co.kr/view/AEN2024100500100032>

<sup>40</sup> Borrell, *Remarks*, 3–4; Yu, *Strengthening the ROK-EU*, 14

operational feasibility and normative alignment – provides a realistic and sustainable model for advancing shared interests in a maritime environment that is becoming increasingly contested. By focusing on politically feasible areas of cooperation, the EU and ROK demonstrate how middle powers can contribute to the regional maritime order not through dominance but by reinforcing legal norms, enhancing governance capacity, and gradually building resilience at sea.

## 6. Conclusion And Implications

The evolving maritime security relationship between the EU and the ROK reflects a broader transformation in middle-power diplomacy in the Indo-Pacific. Confronted by rising maritime insecurity, intensifying great-power rivalry, and the erosion of international norms, both actors have begun to recalibrate their strategic perspectives and explore new partnerships. While neither possesses the global reach of the United States nor the regional dominance of China, each offers distinct but complementary assets to the maritime arena: regulatory and diplomatic expertise on the EU's side; naval preparedness, strategic location, and alliance credibility on the ROK's side.<sup>41</sup>

This alignment, however, remains constrained in its early stages. Geographic distance, asymmetries in strategic posture, and ongoing caution in dealing with China continue to restrict the scope of EU–ROK maritime cooperation. Much of the current convergence is pragmatic rather than revolutionary, centred on issue-specific initiatives such as MDA, HADR, and naval maintenance and repairs. These functional areas matter not because they alter the regional balance of power, but because they reinforce the rules-based maritime order in ways that are politically feasible and operationally achievable.<sup>42</sup> They also act as anchors of soft deterrence in grey-zone maritime competition, where contestation occurs through legal ambiguity, coercive signalling, and the use of non-state proxies rather than conventional force. If institutionalised and expanded, such cooperation has the potential to shape regional norms, foster trust, and fill governance gaps left by more dominant powers increasingly preoccupied with strategic competition.

<sup>41</sup> Yu, Strengthening the ROK–EU, 6–7; Pugliese, *European Maritime Strategy*, 6–9.

<sup>42</sup> Ibid., 11–13; Columbo, *EU–ROK Maritime Coordination*, 4–5.

The implications extend beyond bilateral engagement. As the EU and ROK deepen ties with Southeast Asian institutions, island states, and multilateral forums, they contribute to a more diverse and inclusive security framework in the Indo-Pacific. This partnership also complements broader regional efforts, including Japan's multilateral outreach and ASEAN-led governance structures, reinforcing a diversified and rule-based Indo-Pacific security architecture. Their collaboration offers an alternative model – one grounded in strategic resilience without provocation, multilateralism without dependency, and norm promotion without military escalation.<sup>43</sup> In particular, the EU and ROK demonstrate how middle powers can reinforce order in maritime spaces marked by legal grey zones, fragile institutions, and creeping militarisation – not through dominance, but through consistent commitment to international law and capacity-building. In an increasingly contested maritime environment, this approach may not dominate the regional agenda – but it is essential.

In the future, policymakers in Seoul and Brussels should resist the temptation to overstate the strategic importance of the partnership. Instead, they should focus on cultivating habits of cooperation in areas where interests and capabilities align, expanding strategic dialogue, and working together with regional institutions.<sup>44</sup> By doing so, the EU and ROK can develop from norm-promoting actors into norm-reinforcing partners, acting as a quiet counterbalance to militarisation and demonstrating that in a turbulent Indo-Pacific, middle powers can matter not by dominating the regional system, but by quietly strengthening its foundations.

## About the Author

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<sup>43</sup> Borrell, *Remarks on EU-Asia Maritime Cooperation*, 3–4.

<sup>44</sup> Yen, *Strategic Autonomy*, 10–11.



# NAVIGATING CONVERGENCE: JAPAN'S PERSPECTIVE ON MARITIME SECURITY COOPERATION WITH THE EUROPEAN UNION IN THE INDO-PACIFIC

*Kenji Matei Obayashi*

## Introduction

The Indo-Pacific region has become a focal point of global politics, driven by intensifying U.S.-China rivalry. Acknowledging its strategic relevance, the European Union (EU) released its Indo-Pacific strategy in September 2021, noting that regional tensions directly affect European security and prosperity.<sup>1</sup> The 2022 Strategic Compass further identified the region where its security is 'at stake'.<sup>2</sup> As former High Representative / Vice President (HR/VP) Josep Borrell highlighted, the region accounts for 60% of global maritime trade and 40% of container traffic, underscoring the importance for Europe.<sup>3</sup> Despite the distance, the region has become central to the EU's foreign security policy, highlighting its support for a rules-based order.

Maritime security has emerged as a key priority within the EU's Indo-Pacific strategy, particularly under its 'Security and Defence' pillar, where Japan, as one of the EU's key regional partners, plays a significant role. In January 2021, Japanese Foreign Minister Toshimitsu Motegi became the first Japanese politician to attend the EU Foreign Affairs Council, marking a significant milestone as the EU sought input from Japan – a key

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<sup>1</sup> European External Actions Service (EEAS). EU Strategy for Cooperation in the Indo-Pacific. [https://www.eeas.europa.eu/sites/default/files/jointcommunication\\_2021\\_24\\_1\\_en.pdf](https://www.eeas.europa.eu/sites/default/files/jointcommunication_2021_24_1_en.pdf) (accessed 3 April 2025).

<sup>2</sup> EEAS. A Strategic Compass for Security and Defence. [https://www.eeas.europa.eu/sites/default/files/documents/strategic\\_compass\\_en3\\_web.pdf](https://www.eeas.europa.eu/sites/default/files/documents/strategic_compass_en3_web.pdf) (accessed 3 April 2025).

<sup>3</sup> EEAS. EU Indo-Pacific Ministerial Forum: Opening remarks by High Representative/Vice-President Josep Borrell. [https://www.eeas.europa.eu/eeas/eu-indo-pacific-ministerial-forum-opening-remarks-high-representativevice-president-josep-borrell\\_en](https://www.eeas.europa.eu/eeas/eu-indo-pacific-ministerial-forum-opening-remarks-high-representativevice-president-josep-borrell_en) (accessed 3 April 2025).

originator and promoter of the term ‘Indo-Pacific’ – in shaping its regional strategy.<sup>4</sup> It was also highlighted by the launch of the Japan-EU Security and Defence Partnership in November 2024, which prioritises maritime security cooperation.<sup>5</sup>

This article does not examine specific EU maritime security initiatives in the Indo-Pacific, as these are well covered in existing literature.<sup>6</sup> Instead, it analyses Japan’s perception of the EU’s maritime security role and the factors shaping its view of the EU as a responsible and effective actor in the region. This focus supports the paper’s aim to highlight regional views on Europe’s maritime role. As noted in the EU’s Indo-Pacific Strategy, closer ties with regional partners are vital to uphold the rules-based order and ensure secure sea lanes.<sup>7</sup> Third-party perspectives are key to understanding the EU’s regional priorities.

Scholars have long noted Japan’s low expectations of the EU as a global actor – an ‘Expectation-Deficit’ that has limited its appeal as a security partner.<sup>8</sup> However, the past decade has seen notable progress, marked by the 2018 Strategic Partnership Agreement (SPA) and the 2024 Security and Defence Partnership. This closer relationship is also evident in their multilateral cooperation, particularly in response to Russia’s invasion of Ukraine.

Against this backdrop, this article explores the factors underpinning the growing political dimension of Japan-EU relations from the standpoint of the Japanese

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<sup>4</sup> Ministry of Foreign Affairs of Japan (MOFA). Foreign Minister Motegi’s attendance at the EU Foreign Affairs Council (virtual format). [https://www.mofa.go.jp/press/release/press1e\\_000168.html](https://www.mofa.go.jp/press/release/press1e_000168.html) (accessed 3 April 2025); Nikkei Inc. 2021. “EUに「インド太平洋」連携呼びかけ 外務理事会に日本初出席 [Calling on the EU for the cooperation in the ‘Indo-Pacific,’ Japan’s attendance at the EU Foreign Affairs Council meeting for the first time].” January 25. Accessed May 1, 2025. <https://www.nikkei.com/article/DGXZQODE242QF0U1A120C2000000/>.

<sup>5</sup> MOFA. The European Union-Japan Security and Defence Partnership. <https://www.mofa.go.jp/mofaj/files/100747825.pdf> (accessed 3 April 2025).

<sup>6</sup> Nováky, Niklas. 2022. “The Coordinated Maritime Presences Concept and the EU’s Naval Ambitions in the Indo-Pacific.” *European View* 21 (1): 56–65; Pugliese, Giulio. 2022. “The European Union’s Security Intervention in the Indo-Pacific: Between Multilateralism and Mercantile Interests.” *Journal of Intervention and Statebuilding* 17 (1): 76–98; Pugliese, Giulio. 2024. “The European Union and an “Indo-Pacific” Alignment.” *Asia-Pacific Review* 31 (1): 17–44.

<sup>7</sup> EEAS, EU Strategy for Cooperation in the Indo-Pacific, September 16, 2021.

<sup>8</sup> Tsuruoka, Michito. 2008. “Expectations deficit in EU-Japan relations: Why the relationship cannot flourish.” *Current Politics and Economics of Asia* 17 (1): 107–126; Lai, Suetyi, Paul Bacon, and Martin Holland. 2022. “Three Decades on: Still a Capability-Expectations Gap? Pragmatic Expectations Towards the EU From Asia in 2020.” *Journal of Common Market Studies* 61 (2): 451–68.

government, arguing that this political deepening has fostered Japan's expectations for further maritime security cooperation with the EU. This analysis draws upon a diverse array of sources related to the Japanese government, including official policy documents, press releases, and speeches dating from the Second Abe Administration (2012–2020), former Prime Minister (PM) Shinzo Abe's memoir, as well as commentary from Japanese and international media, and academic literature.

## **Towards a Free and Open Indo-Pacific: EU-Japan Alignment**

To capture the growing momentum behind Japan-EU maritime security cooperation, it is essential to examine the foreign security policy of the second Abe administration through the analytical lens of its values-based diplomatic orientation. The administration placed emphasis on Japan's maritime role from the outset, promoting 'Open and Stable Seas' through the rule of law, securing navigation, and the peaceful resolution of disputes.<sup>9</sup> Despite its brevity, the first Abe administration (2006–2007) also emphasised similar principles.<sup>10</sup>

The focus on 'Open and Stable Seas' reflected Japan's security reliance on a maritime order rooted in traditional international law. Japan's first National Security Strategy (NSS), released in 2013, highlighted that sovereignty disputes in the South China Sea and growing vulnerabilities in key sea lanes between Japan and the Middle East due to regional conflicts, terrorism, and piracy threaten maritime stability, emphasising the need for stronger security measures.<sup>11</sup>

Building on this recognition, the administration aimed to take a leading role in safeguarding the global maritime commons through close international cooperation. At the Sixth Tokyo International Conference on African Development (TICAD VI) in

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<sup>9</sup> Cabinet Secretariat, National Security Strategy December 17, 2013. <https://www.cas.go.jp/jp/siryoku/131217anzenhoshou/nss-e.pdf> (accessed 13 April 2025).

<sup>10</sup> MOFA. On the "Arc of Freedom and Prosperity" An Address by H.E. Mr. Taro Aso, Minister for Foreign Affairs on the Occasion of the 20th Anniversary of the Founding of the Japan Forum on International Relations, Inc. <https://www.mofa.go.jp/policy/pillar/address0703.html> (accessed 13 April 2025); MOFA. "Confluence of the Two Seas" Speech by H.E. Mr. Shinzo Abe, Prime Minister of Japan at the Parliament of the Republic of India. <https://www.mofa.go.jp/region/asia-paci/pmv0708/speech-2.html> (accessed April 13, 2025).

<sup>11</sup> Cabinet Secretariat, National Security Strategy December 17, 2013.

Nairobi, Kenya, in August 2016, Prime Minister (PM) Abe officially unveiled the Free and Open Indo-Pacific (FOIP) strategy. In the strategy, Abe underscored the importance of connecting two free and open oceans, specifically the Indian and Pacific Oceans.<sup>12</sup> Subsequently, Japan's 2017 Diplomatic Bluebook underscored the escalating threats to maritime order in the Indo-Pacific region, emphasising the promotion of the FOIP strategy. It emphasised key pillars such as the protection of freedom of navigation, the adherence to the rule of law, and the strengthening of maritime enforcement mechanisms to ensure regional stability.<sup>13</sup>

Since then, Japan has continued to advance maritime security cooperation with relevant countries to maintain and reinforce the regional maritime order essential to realising the vision of FOIP.<sup>14</sup> This approach has persisted beyond the end of second Abe administration. The latest NSS and the National Defence Strategy, adopted under the Kishida administration in December 2022, reflected continuity with the Abe era by reaffirming Japan's commitment to working with allies and like-minded partners to uphold a free and open international order, ensure regional stability, and advance the FOIP vision.<sup>15</sup>

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<sup>12</sup> MOFA. Address by Prime Minister Shinzo Abe at the Opening Session of the Sixth Tokyo International Conference on African Development (TICAD VI). [https://www.mofa.go.jp/afr/af2/page4e\\_000496.html](https://www.mofa.go.jp/afr/af2/page4e_000496.html) (accessed 14 April 2025); Abe, Shinzo, Goro Matsumoto, Hiroshi Oyama and Shigeru Kitayama. 2023. 安倍晋三回顧録 [Shinzo Abe Memoir]. Tokyo: Chuokoron-Shinsha, 314.

<sup>13</sup> MOFA. Diplomatic Bluebook 2017. <https://www.mofa.go.jp/mofaj/gaiko/bluebook/2018/pdf/pdfs/1.pdf#page=4> (accessed 13 April 2025).

<sup>14</sup> Former PM Abe initially presented the FOIP as a "strategy," but later reframed it as a "vision," acknowledging that the term "strategy" might be perceived as overly assertive by key partners such as India, Australia, and ASEAN, who remained wary of aligning with an explicitly anti-China posture. This rhetorical shift also reflected a broader recalibration in the Abe administration's approach toward China from 2017 onward, marked by a more conciliatory stance, including a moderated position on the Belt and Road Initiative (BRI). See: Mie, Oba. 2018. "日本の「インド太平洋」構想 [Indo-Pacific: from Japan's Perspective]," *Journal of international security* 46 (3): 23-24; Iida, Masahumi. 2021. "『自由で開かれたインド太平洋』をめぐる日本の政策の展開 [Indo-Pacific: from Japan's Perspective]," *Issues & Studies: A Social Science Quarterly on the Asia-Pacific Region* 50 (1): 27.

<sup>15</sup> Cabinet Secretariat. National Security Strategy of Japan. December 16, 2022. <https://www.cas.go.jp/jp/siryoku/221216anzenhoshou/nss-e.pdf> (accessed 1 April 2025); Cabinet Secretariat. National Defence Strategy. December 16, 2022. [https://www.mod.go.jp/j/policy/agenda/guideline/strategy/pdf/strategy\\_en.pdf](https://www.mod.go.jp/j/policy/agenda/guideline/strategy/pdf/strategy_en.pdf) (accessed 1 April 2025). Takenaka argues that Kishida administration maintained the strategic nature of the vision as a response to the growing presence and influence of China in the Indo-Pacific region. See: Takenaka, Harukata. 2023. "Prime Minister Kishida Fumio's "Free and Open Indo-Pacific" Initiative: Japan silently refines its strategic nature." *Asia-Pacific Review* 30 (2): 127-147.



As Japan advances the vision of FOIP, it has simultaneously placed greater emphasis on diplomatic engagement with Europe, foremost including the EU-27. This strategic reorientation has laid the groundwork for deepening maritime security cooperation between Japan and the EU. Japan's 2013 NSS underscored the importance of strengthening Japan-EU relations to uphold global norms and maintain stability amid shifting power dynamics.<sup>16</sup> The words of Nobukatsu Kanehara, who served as Deputy Chief Cabinet Secretary (2012–2019) to PM Abe, reflect this way of Japan's understanding. He explained that the Abe administration's foreign security policy focused on balancing China's rise by strengthening ties with European democracies to support a rules-based international order.<sup>17</sup> China's ongoing efforts to unilaterally alter the maritime status quo, particularly through aggressive actions in the East and South China Seas, have emerged as a significant and escalating concern for Japan. From Japan's perspective, the EU, with its 'ability to shape international public opinion and develop norms within major international frameworks',<sup>18</sup> has become a key partner. In this context, fostering a shared normative understanding with the EU is crucial for Japan to ensure alignment on key maritime security concerns.

The conclusion of EU–Japan SPA in 2018, described by PM Abe as uniting 'the guardians of universal values',<sup>19</sup> further emphasised cooperation on maritime issues, with a focus on adherence to international law, including UNCLOS (United Nations Convention on the Law of the Sea) and the freedoms of navigation and overflight.<sup>20</sup> Following the SPA's conclusion, Japan and the EU have deepened maritime security cooperation. Since 2020, European Union Naval Force (EUNAVFOR) and Japan's Maritime Self-Defence Force (MSDF) have conducted joint exercises in the Indian

<sup>16</sup> Cabinet Secretariat, National Security Strategy December 17, 2013.

<sup>17</sup> Kanehara, Nobukatsu. 2020. "巻頭インタビュー 安倍長期政権の世界史的遺産 自由主義的な国際秩序へのリーダーシップ [Opening interview The World-Historical Legacy of Abe's Long-Term Government Leadership For a Liberal International Order]." *Diplomacy* 63: 11.

<sup>18</sup> Cabinet Secretariat, National Security Strategy December 17, 2013.

<sup>19</sup> Prime Minister Office of Japan. 欧州連結性フォーラム安倍総理基調講演[Keynote Speech by Prime Minister Abe at the EU Connectivity Forum]. [https://www.kantei.go.jp/jp/98\\_abe/statement/2019/0927eforum.html](https://www.kantei.go.jp/jp/98_abe/statement/2019/0927eforum.html) (accessed 1 April 2025).

<sup>20</sup> MOFA. Japan-EU Strategic Partnership Agreement. <https://www.mofa.go.jp/mofaj/files/000381942.pdf> (accessed 1 April 2025).

Ocean to enhance maritime security and support the FOIP vision.<sup>21</sup> Their collaboration included tactical drills, surveillance support, and joint exercises with Djibouti's forces. In 2023, a new Administrative Arrangement for communication and coordination on joint anti-piracy exercises was signed,<sup>22</sup> leading to further joint anti-piracy operations in 2024.<sup>23</sup> Japan's commitment to maritime security cooperation with the EU, especially in counter-piracy, is driven by its reliance on secure sea lanes and a shared commitment to the rule of law at sea. This normative convergence between Japan and the EU was further demonstrated at the 2023 EU-Japan Summit, where the Japanese government officially recognised that bilateral cooperation with the EU had advanced through joint naval exercises and capacity-building initiatives.<sup>24</sup>

Japan's efforts to address its maritime security concerns through the EU – widely recognised as a norm-setter in international politics – were also reflected in the Joint Statements issued at the EU-Japan summits in 2022 and 2023. Both statements reaffirmed Japan's opposition to any unilateral attempts to alter the status quo regarding the Senkaku Islands – territory at the heart of a protracted territorial dispute with China.<sup>25</sup> These statements underscored Japan's emphasis on securing international support for its maritime security priorities and realising the vision of FOIP.

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<sup>21</sup> Japan Ministry of Defence (MOD). 日・EU共同海上訓練の実施に関する共同発表[EU-Japan joint naval exercise]. [https://www.mod.go.jp/j/approach/exchange/area/2020/pdf/20201007\\_eu-j.pdf](https://www.mod.go.jp/j/approach/exchange/area/2020/pdf/20201007_eu-j.pdf) (accessed 26 April 2025); MOD. Japan-EU--Djibouti joint naval exercise. <https://www.mod.go.jp/en/article/2021/05/ca5e6afc47cecf76aa0fd09fec7343fe61560801.html#1> (accessed 26 April 2025).

<sup>22</sup> Delegation of the European Union to Japan. EU, Japan agree on formal arrangement to facilitate naval cooperation. [https://www.eeas.europa.eu/delegations/japan/eu-japan-agree-formal-arrangement-facilitate-naval-cooperation\\_en?s=169](https://www.eeas.europa.eu/delegations/japan/eu-japan-agree-formal-arrangement-facilitate-naval-cooperation_en?s=169) (accessed 26 April 2025).

<sup>23</sup> Joint Staff, Japan Ministry of Defence. E U海上部隊との海賊対処共同訓練の実施について[Joint Anti-Piracy Exercise with the EU Naval Force]. [https://www.mod.go.jp/js/pdf/2024/p20241220\\_01.pdf](https://www.mod.go.jp/js/pdf/2024/p20241220_01.pdf) (accessed 26 April 2025).

<sup>24</sup> MOFA. The 29th Japan-EU Summit Meeting. [https://www.mofa.go.jp/erp/ep/page4e\\_001456.html](https://www.mofa.go.jp/erp/ep/page4e_001456.html) (accessed 26 April 2025).

<sup>25</sup> MOFA. Japan-EU Summit 2022 Joint Statement. <https://www.mofa.go.jp/files/100343125.pdf> (accessed 26 April 2025); European Commission. EU-Japan Summit - Joint statement. [https://ec.europa.eu/commission/presscorner/detail/en/statement\\_23\\_3846](https://ec.europa.eu/commission/presscorner/detail/en/statement_23_3846) (accessed 26 April 2025).

## Limits of Convergence

While Japan increasingly recognises the EU as a normative power – particularly in its commitment to a rules-based order and multilateralism – this perception has facilitated closer cooperation in the area of maritime security. However, several challenges may prevent the EU from fully meeting Japan's growing expectations, potentially hindering the effective implementation of the EU's Indo-Pacific strategy. One of the key challenges is the EU's ambivalent and incoherent approach to China.

Both its Indo-Pacific Strategy and the Strategic Compass highlight the EU's aim to expand naval diplomacy in the region through joint and multilateral exercises to counter piracy and uphold freedom of navigation. In this context, for Japan – eager to find like-minded partners for maritime security cooperation to achieve the FOIP vision – a strategically coherent EU engagement in Indo-Pacific maritime security would address Japan's growing expectations of the EU.

As previously noted, Japan's vision for a FOIP is shaped by growing concerns over China's increasing assertiveness in the region. This is also clearly reflected in Japan's latest NSS, which designates China as the 'greatest strategic challenge'.<sup>26</sup> Therefore, the EU's stance on China will be a key factor shaping the future of Japan-EU maritime security cooperation. Japan has, on certain occasions, tended to see the EU as prioritising economic relations with China over regional security. This perception has been reinforced by instances such as the EU's consideration in the 2000s of lifting its arms embargo on China – originally imposed in the aftermath of the 1989 Tiananmen Square protests and massacre – which underscored a significant divergence in threat perceptions between Japan and the EU.<sup>27</sup>

This scepticism persists today, fuelling Japanese doubts about the EU's capacity for meaningful maritime security engagement, as fears of economic retaliation from China continue to hinder strategic coherence among member states. The EU's neutral stance following the 2016 arbitral ruling on the South China Sea – driven in part by opposition from Member States such as Hungary and Greece, both of which have

<sup>26</sup> Cabinet Secretariat, National Security Strategy December 16, 2022.

<sup>27</sup> Tsuruoka, "Expectations deficit in EU-Japan relations," 121.

significant economic ties with China,<sup>28</sup> – exposed the limits of a unified European response to regional maritime security challenges that have direct security interests for Japan.<sup>29</sup> Given the EU's inability to issue a unified statement on security concerns relevant to the FOIP vision, it appears unrealistic from Japan's perspective to expect the Union to conduct Common Security and Defence Policy (CSDP)-level maritime operations in the Indo-Pacific – despite such ambitions being articulated in several EU strategic documents – since unanimity among Member States remains a prerequisite.

In this context, the Coordinated Maritime Presence (CMP), implemented in 2019, provides a more flexible, non-CSDP alternative by relying on voluntary naval contributions from Member States to enhance maritime awareness.<sup>30</sup> However, under the CMP, the current Maritime Area of Interest (MAI) in the Indo-Pacific is limited to the western Indian Ocean. It does not extend to broader strategic areas – such as the South China Sea – reflecting Member States' reluctance to antagonise China.<sup>31</sup> In addition to European economic dependence on the Chinese market, amid Trump's second term, factors such as growing transatlantic uncertainty may contribute to the acceleration of EU-China rapprochement,<sup>32</sup> reinforcing the EU's reluctance to assume a more proactive maritime security role in the Indo-Pacific. Although the 25th EU-China Summit on 24 July 2025 exposed persistent frictions over trade and security

<sup>28</sup> Emmot, Robin. 2016. "EU's statement on South China Sea reflects divisions." Reuters, July 15. Accessed May 1, 2025. <https://www.reuters.com/article/uk-southchinasea-ruling-eu-idUKKCN0ZV1UP/>.

<sup>29</sup> Japan has been urging respect for international law in the South China Sea, commends the Philippines for complying with the arbitral award, and criticises China's rejection of it as undermining the rule of law. See: MOFA. Eight years since the issuance of the Arbitral Tribunal's award as to the disputes between the Republic of the Philippines and the People's Republic of China regarding the South China Sea (Statement by Foreign Minister KAMIKAWA Yoko). [https://www.mofa.go.jp/press/release/pressite\\_000001\\_00430.html](https://www.mofa.go.jp/press/release/pressite_000001_00430.html). (accessed 2 May 2025).

<sup>30</sup> EEAS. Factsheet: Coordinated Maritime Presences. [https://www.eeas.europa.eu/eeas/factsheet-coordinated-maritime-presences\\_en](https://www.eeas.europa.eu/eeas/factsheet-coordinated-maritime-presences_en) (accessed 3 April 2025).

<sup>31</sup> Nováky, "The Coordinated Maritime Presences concept and the EU's naval ambitions in the Indo-Pacific," 61.

<sup>32</sup> Bermingham, Finbarr. 2025. "Faced with Donald Trump's hostility, is the European Union pivoting towards China?" South China Morning Post, April 16. Accessed May 1, 2025. <https://www.scmp.com/news/china/diplomacy/article/3306673/faced-donald-trumps-hostility-european-union-pivoting-towards-china>; McMorrow, Joe Leahy, Chan Ho-him and Andy Bounds. 2025. "China seeks reset with EU amid Donald Trump's trade war." Financial Times, April 17. Accessed May 1, 2025. <https://www.ft.com/content/1b336307-d8c6-4e37-a4d6-54e021e5c339>.

– underscoring the limits of rapprochement<sup>33</sup> – the EU continues to oscillate between engagement and confrontation with Beijing. This strategic ambivalence may deepen Japanese doubts about the EU's reliability as a maritime security partner in advancing the FOIP vision.

Furthermore, even EU Member States such as France and Germany – despite their incremental efforts to bolster maritime security engagement in the Indo-Pacific in response to China's growing assertiveness<sup>34</sup> – have elicited scepticism in Japan regarding the depth and reliability of their strategic commitment. For example, former PM Abe noted in his memoir that Germany's focus on short-term economic interests with China, reflected in Chancellor Merkel's China-oriented stance, undermined her criticism of Beijing.<sup>35</sup> This was further exemplified in 2021, when German frigate Bayern refrained from entering contested waters in the South China Sea and the Taiwan Strait, and even sought a port call in Shanghai.<sup>36</sup> Similarly, President Macron's 2023 remarks advocating European neutrality in the U.S.-China rivalry over Taiwan raised concerns in Japan about France's strategic reliability – particularly given its role as a key proponent of increased EU engagement in the Indo-Pacific—potentially straining Europe-Japan maritime security cooperation.<sup>37</sup> Those perceptions may reinforce Japan's apprehension regarding the EU's strategic consistency and normative commitment in the region. While such scepticism has been most pronounced in the cases of France and Germany, similar concerns could potentially apply to Italy and the Netherlands, both of which have also stepped up their naval presence in the Indo-Pacific in recent

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<sup>33</sup> Chen, Laurie, Liz Lee and Xiuhao Chen. 2025. "EU-China ties at 'inflection point', von der Leyen says after tense Beijing summit." *Reuter*, July 25. Accessed July 25, 2025. [https://www.reuters.com/world/china/eu-china-ties-inflection-point-von-der-leyen-says-after-tense-beijing-summit-2025-07-24/?utm\\_source=chatgpt.com](https://www.reuters.com/world/china/eu-china-ties-inflection-point-von-der-leyen-says-after-tense-beijing-summit-2025-07-24/?utm_source=chatgpt.com).

<sup>34</sup> Meijer, Hugo. 2022. *Awakening to China's Rise: European Foreign and Security Policies toward the People's Republic of China*. Oxford, United Kingdom: Oxford University Press.

<sup>35</sup> Abe et al., "Shinzo Abe Memoir," 314.

<sup>36</sup> The request that was eventually rejected by Beijing. See: Kastner, Jens. 2021. "German frigate heads to South China Sea; seeks to dock at Shanghai." *Nikkei Asia*, August 18. Accessed May 1, 2025. <https://asia.nikkei.com/Politics/International-relations/Indo-Pacific/German-frigate-heads-to-South-China-Sea-seeks-to-dock-at-Shanghai>.

<sup>37</sup> Kusakabe, Motomi. 2023. "日本政府内に波紋呼んだ仏大統領の台湾発言 [The French president's comments on Taiwan have caused a stir within the Japanese government]." *Mainichi Shimbun*, April 16. Accessed May 1, 2025. <https://mainichi.jp/articles/20230414/k00/00m/010/325000c>.

years.<sup>38</sup> Whether these deployments reflect sustained maritime security commitments or merely symbolic gestures remains an open question.

The EU's limited allocation of resources to maritime security activities is another factor that may fall short of Japan's expectations, particularly concerning CSDP activities, as these are primarily funded by participating Member States rather than the EU itself.<sup>39</sup> There have been discussions regarding the use of CSDP-related instruments – such as the European Defence Fund (EDF), the European Peace Facility (EPF), and Permanent Structured Cooperation (PESCO) – to facilitate cooperation with partners in the Indo-Pacific, focusing on developing regional capabilities, funding CSDP missions, supporting peace operations, and providing long-term capacity-building assistance.<sup>40</sup> However, there has been little internal debate within the EU on applying these instruments specifically to maritime security engagement in the Indo-Pacific. Consequently, the effectiveness of the EU's current toolbox for maritime security in the region remains unclear. This uncertainty is further compounded by the EU's strategic prioritisation of closing critical capability gaps and strengthening its defence industrial base to address threats emanating from its immediate neighbourhood – most notably, Russia – as emphasised in the EU's first White Paper on Defence released in March 2025.<sup>41</sup> Unless the EU makes more concerted efforts to resource its security and defence role in the Indo-Pacific, Japan may view it as a limited or unreliable partner – risking the EU's marginalisation in the region's evolving geopolitical landscape.

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<sup>38</sup> Patalano, Alessio. 2024. "What is an Italian Carrier Strike Group Doing in the Indo-Pacific?" War On the Rocks, August 29. Accessed May 1, 2025. <https://warontherocks.com/2024/08/what-is-an-italian-carrier-strike-group-doing-in-the-indo-pacific/>; Shogo, Akagawa. 2024. "欧州の海空軍、太平洋集結へ 中国念頭に南シナ海も航行台湾発言 [European naval and air forces converge in the Pacific, navigate South China Sea with China in mind, and issue statements on Taiwan]." Nikkei Inc, May 7. Accessed May 1, 2025. <https://www.nikkei.com/article/DGXZQGR060AV0W4A500C2000000/>.

<sup>39</sup> Keukeleire, Stephan, and Tom Delreux. 2022. *The foreign policy of the European Union*. 3rd edition. London: Bloomsbury, 138.

<sup>40</sup> European Parliament. Security and defence in the Indo-Pacific: What is at stake for the EU and its strategy? [https://www.europarl.europa.eu/RegData/etudes/IDAN/2022/653660/EXPO\\_IDA\(2022\)653660\\_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/IDAN/2022/653660/EXPO_IDA(2022)653660_EN.pdf) (accessed 1 May 2025).

<sup>41</sup> European Commission. Joint White Paper for European Defence Readiness 2030. [https://defence-industry-space.ec.europa.eu/document/download/30b50d2c-49aa-4250-9ca6-27a0347cf009\\_en?filename=White%20Paper.pdf](https://defence-industry-space.ec.europa.eu/document/download/30b50d2c-49aa-4250-9ca6-27a0347cf009_en?filename=White%20Paper.pdf) (accessed 1 May 2025).

## Conclusion

Japan's view of the EU as a maritime security partner in the Indo-Pacific reflects a nuanced mix of strategic interests and shared values. As shown in this article, Japan increasingly acknowledges the EU's role in supporting the rules-based maritime order central to the FOIP vision. This recognition has grown alongside deepening bilateral ties, beginning with the second Abe administration's value-driven diplomacy. Milestones such as the 2018 SPA, the 2024 Security and Defence Partnership, and growing MSDF-EUNAVFOR cooperation highlight this trend.

However, the partnership continues to face structural challenges. From Japan's perspective, internal divisions within the EU and its ambivalent approach towards China undermine efforts to uphold a rules-based maritime order, thereby casting doubt on the Union's credibility as a strategic actor. Incoherent political messaging and constrained resources for Indo-Pacific engagement further exacerbate concerns regarding the EU's reliability – particularly in light of certain Member States' accommodating stance towards Beijing. While Japan values the EU's commitment to international law and freedom of navigation, it may also perceive the EU as more focused on threats closer to home, like Russia. Moving forward, Japan's expectations – and the success of the EU's Indo-Pacific Strategy – will depend on the EU's strategic resolve, internal coherence, and effective use of its security tools within and beyond the CSDP framework.

The second Trump U.S. administration is also a key factor shaping EU-Japan maritime security cooperation. With the United States urging European allies to take greater responsibility for continental defence, the EU may scale back its Indo-Pacific maritime security engagement, potentially tempering Japan's growing expectations. However, this shift may carry broader security implications, given the interconnected security challenges between Europe and the Indo-Pacific – such as North Korea's and China's support for Russia. The EU's dependence on Indo-Pacific trade routes for critical resources underscores the region's strategic importance. Amid these dynamics, Japan remains a key partner in upholding a stable, rules-based maritime order. The EU must therefore fully recognise and address these evolving dynamics to protect its long-term strategic interests.

## About the Author

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# A HIDDEN HAZARD: THE CHINESE-RUSSIAN MILITARY RELATIONSHIP IN THE INDO-PACIFIC

*Stella Kim*

## From Rivals to Partners: China and Russia in the Indo-Pacific

The Chinese-Russian relationship has undergone a myriad of changes over the past century: from communist partners to the Sino-Soviet split to tentative partners forming an emerging alliance – it has been anything but steady. Their roles in this relationship have also undergone a significant transformation. In the 1950s, China was still the junior partner, receiving financial, technical, educational, and military assistance from the Soviet Union to rebuild a communist regime after the civil war. Today, China has overtaken Russia in global influence, trade volume, and military size, and has now placed Russia in the role of the junior partner. However, their military relationship is still shaped by interdependence: China holds the superior position in almost all categories – except for strategic nuclear arms – but lacks the combat experience that Russia has tested recently in Georgia, Syria, and Ukraine.<sup>1</sup> There are signs that this is also changing, with recent reports of Chinese unmanned aerial vehicles (UAVs) or drones appearing in Ukraine, suggesting that China is now also supplying Russia with arms.<sup>2</sup> Despite the many phases of their relationship, the nature of its current state is especially relevant to analyse in the Indo-Pacific.

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<sup>1</sup> Joachim Krause, „The Way Forward: How Should Europe Deal with Russia and China?“, in *Russia-China Relations*, hg. von Sarah Kirchberger u. a., Global Power Shift (Springer International Publishing, 2022), [https://doi.org/10.1007/978-3-030-97012-3\\_15](https://doi.org/10.1007/978-3-030-97012-3_15).

<sup>2</sup> Stephen Blank, „Liberalism’s Puzzle: The Russo–Chinese Alliance in the Light of Russian Aggression against Ukraine“, *The Korean Journal of Defense Analysis* 34, Nr. 4 (2022): 566, <https://doi.org/10.22883/KJDA.2022.34.4.003>.

In the past few decades, their military cooperation has received some academic and media attention. What makes their joint military exercises particularly noteworthy is that the majority of them take place in the Indo-Pacific: joint naval exercises in the South China Sea, in the Bering Strait of the Arctic Ocean, and in the East China Sea and the Sea of Japan, which are also the main regional focus of their joint aerial patrols.<sup>3</sup> This is especially concerning given the importance of the Indo-Pacific: the region is home to more than half the world's population and accounts for 60% of global GDP and two-thirds of global economic growth.<sup>4</sup> One-third of global shipping crosses the South China Sea.<sup>5</sup> This makes the stability of the region a priority for non-resident powers such as Europe. However, China's growing military power and assertiveness in the region have posed a threat to the 'Free and Open Indo-Pacific' strategy of the United States, underlining the growing geopolitical rivalry that is manifesting in the region.

China, with military spending estimated at US\$314 billion in 2024 (around 1.7% of its GDP), and Russia, with military expenditure estimated at US\$149 billion in 2024 (approximately 7.1% of its GDP), are ranked second and third globally in their military spending. Their combined expenditure still trails far behind that of the United States, at US\$997 billion, or around 3.4% of American GDP.<sup>6</sup> China now has the biggest navy in the world – the People's Liberation Army Navy (PLAN) – with 355 vessels in 2024.<sup>7</sup> Witnessing the second- and third-largest military spenders – who are also the two major challengers of the U.S.-led liberal world order – forge a military relationship is clearly alarming, and seeing this develop in the volatile Indo-Pacific region even more so.

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<sup>3</sup> „China-Russia Dashboard: Facts and figures on a special relationship“, MERICS, zugegriffen 12. Mai 2025, <https://merics.org/en/china-russia-dashboard-facts-and-figures-special-relationship>.

<sup>4</sup> „The United States' Enduring Commitment to the Indo-Pacific: Indonesia“, *U.S. Embassy & Consulates in Indonesia*, 9. Februar 2024, <https://id.usembassy.gov/the-united-states-enduring-commitment-to-the-indo-pacific-indonesia/>.

<sup>5</sup> Ulrich Jochheim und Rita Barbosa Lobo, *Geopolitics in the Indo-Pacific: Major Players' Strategic Perspectives* (European Parliamentary Research Service, 2023).

<sup>6</sup> Xiao Liang u. a., *Trends in World Military Expenditure*, 2024 (Stockholm International Peace Research Institute, 2025), <https://doi.org/10.55163/AVEC8366>.

<sup>7</sup> Jochheim und Barbosa Lobo, *Geopolitics in the Indo-Pacific: Major Players' Strategic Perspectives*.

Several strategic perspectives diverge in the region, as multiple global powers have a stake in the Indo-Pacific – China, Russia, and the United States, as well as Europe, whose growing interest in the region contributes to its contested and polarised nature. China seeks to establish itself as the dominant regional power in the Indo-Pacific, both by reducing U.S. presence and asserting sovereignty over disputed territories. Russia aims to be recognised as a global player, which requires maintaining a robust presence in the Pacific. The United States' goal is to maintain a rules-based order, ensuring freedom of navigation and overflight by balancing China's growing influence in both the Pacific and Indian Oceans. The United States seeks to safeguard its interests through further security initiatives such as the Quadrilateral Security Dialogue (QUAD) with Japan, Australia, and India.<sup>8</sup> For Europe, securing trade and supply chains remains the biggest priority in the Indo-Pacific, given its extensive trade volume with the region. These overlapping goals and conflicting interests make the region into a true tinderbox. Adding contemporary security challenges such as Taiwan and North Korea further increases the complexity and volatility of the regional landscape.

This paper highlights the joint Chinese-Russian aerial patrols, which have individually received some media attention but have yet to be analysed collectively to provide for a clear perspective in their military relationship.

## Emerging Alliance or Strategic Partners

Russia and China have established a 'Comprehensive Strategic Partnership,' styling it a 'no-limit partnership' shortly before the Russian invasion of Ukraine.<sup>9</sup> They have had a long history of arms sales: China accounted for 20% of all Russian export orders from 1997–2007 and was China's primary supplier of defence technologies; however, Chinese dependency on Russian arms has been declining, amounting to 3%

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<sup>8</sup> Lucas Gualberto do Nascimento und Marcos Cordeiro Pires, „The Indo-Pacific Geostrategy and the Quad: The Pacific Century and China-USA Disputes“, *REI - Revista de Estudos Internacionais* 14, Nr. 1 (2023): 1, <https://doi.org/10.29327/252935.14.1-8>; Bo Ma, „China's Fragmented Approach toward the Indo-Pacific Strategy: One Concept, Many Lenses“, *China Review* 20, Nr. 3 (2020): 177–204.

<sup>9</sup> Juha Kukkola und Matti Puranen, „The Eurasian Security System: A Preliminary Framework for Understanding the Emerging Sino-Russian Relationship“, *Journal of Military Studies* 11, Nr. 1 (2022): 63, <https://doi.org/10.2478/jms-2022-0006>.

at present.<sup>10</sup> Russian weapons have been a core part of assisting the modernisation of the Chinese military, which is crucial for China in gaining military superiority in the Indo-Pacific.<sup>11</sup> Aside from selling arms, Russia has also licensed China to produce weapons, including fighter jets, missiles, and naval guns.<sup>12</sup>

Their joint military exercises have been taking place since the 2000s and have shifted primarily towards naval and aerial exercises since 2022.<sup>13</sup> China and Russia have participated in 51 bilateral, multilateral, or national exercises with personnel from each other's armed forces since 2005.<sup>14</sup> Half of these were interstate combat exercises,<sup>15</sup> which indicates what kind of contingency scenarios China and Russia are practising for. Joint naval exercises have been held since 2012, showing their willingness to cooperate in more sensitive strategic and political areas.<sup>16</sup> There has been a notable increase in the frequency of their joint exercises, suggesting a deepening of their military relationship.<sup>17</sup> Their increasing bilateral military cooperation since the 2014 annexation of Crimea is further expected to expand into new regions such as the Arctic.<sup>18</sup> As previously mentioned, Russia has become the junior partner in this relationship, which is evidenced by the fact that while China regularly uses their joint exercises to bolster its claims to contested territory, Beijing rarely uses them

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<sup>10</sup> Sarah Kirchberger, „Russian-Chinese Military-Technological Cooperation and the Ukrainian Factor“, in *Russia-China Relations*, hg. von Sarah Kirchberger u. a., Global Power Shift (Springer International Publishing, 2022), [https://doi.org/10.1007/978-3-030-97012-3\\_5](https://doi.org/10.1007/978-3-030-97012-3_5); Alexandre Sheldon-Duplaix, „Russia-China Naval Partnership and Its Significance“, in *Russia-China Relations*, hg. von Sarah Kirchberger u. a., Global Power Shift (Springer International Publishing, 2022), [https://doi.org/10.1007/978-3-030-97012-3\\_6](https://doi.org/10.1007/978-3-030-97012-3_6).

<sup>11</sup> Rajan Menon, „The Limits of Chinese–Russian Partnership“, *Survival* 51, Nr. 3 (2009): 113, <https://doi.org/10.1080/00396330903011529>.

<sup>12</sup> Paul J. Bolt und Sharyl N. Cross, *China, Russia, and Twenty-First Century Global Geopolitics* (Oxford University Press, 2018), 1:118, <https://doi.org/10.1093/oso/9780198719519.001.0001>.

<sup>13</sup> MERICS, „China-Russia Dashboard: Facts and figures on a special relationship“.

<sup>14</sup> Oriana Skylar Mastro, „Sino-Russian Military Alignment and Its Implications for Global Security“, *Security Studies* 33, Nr. 2 (2024): 254–90, <https://doi.org/10.1080/09636412.2024.2319587>.

<sup>15</sup> Mastro, „Sino-Russian Military Alignment and Its Implications for Global Security“.

<sup>16</sup> Sheldon-Duplaix, „Russia-China Naval Partnership and Its Significance“.

<sup>17</sup> Mastro, „Sino-Russian Military Alignment and Its Implications for Global Security“, 278.

<sup>18</sup> Stephen Blank, „Liberalism's Puzzle“, 565.

to support Russian territorial claims.<sup>19</sup> Furthermore, Russia is the country with which China conducts the most training and combat simulations.<sup>20</sup> They have also moved towards building a joint early-warning system capable of detecting missile attacks.<sup>21</sup>

While not formally named an alliance by either country, their joint military cooperation gives the impression of a de facto alliance.

### Joint Aerial Patrols – a New Dimension of Chinese-Russian Military Interoperability



Figure 1. Approximate flight route of the joint air patrols (excluding the 8th Air Patrol)<sup>22</sup>

The joint Chinese-Russian aerial patrols have taken place since 2019. The airplanes used in the exercises and the route have not varied much since the first exercise, but there have been some smaller noteworthy changes. Analysing the joint air patrols remains a challenge due to the lack of publicly available resources and, in parts, contradictory statements. For the summary of joint air patrols, newspaper articles from Russian, Chinese, South Korean, Japanese and American outlets were used to provide coverage from various perspectives.

Usually, the planes depart from their respective air bases and meet in international airspace, which means entering the Air Defence Identification Zones (ADIZ)<sup>23</sup> of both Korea and Japan.

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<sup>19</sup> Mastro, „Sino-Russian Military Alignment and Its Implications for Global Security“.

<sup>20</sup> Sheldon-Duplaix, „Russia-China Naval Partnership and Its Significance“.

<sup>21</sup> Sheldon-Duplaix, „Russia-China Naval Partnership and Its Significance“.

<sup>22</sup> This is an approximate flight route of the joint air patrols – except for the 8th Air Patrol which took place near Alaska – although details vary on whether they enter from the Sea of Japan or East China Sea. Here the two focus points of Tsushima Strait and Miyako Strait are evident.

<sup>23</sup> Air Defence Identification Zone (ADIZ) is a state's territory that extends 12 nautical miles from its border for littoral countries which includes the airspace (according to the 1982 United Nations Convention on the Law of the Sea (UNCLOS)). A country can oversee the airspace of its ADIZ for its national security, requiring foreign civil and military aircrafts having to identify themselves before entering these zones. However, an ADIZ is not recognized as sovereign airspace under international law and thus have somewhat ambiguous legal standing. More than 20 states claim an ADIZ, however, there can be also overlapping claims.

The Russian and Chinese planes typically meet in the East China Sea around Socotra Rock, sometimes flying further through the Miyako Strait before making their course towards the Sea of Japan via the Tsushima Strait.<sup>24</sup> The planes either take the same route back or exit through the Sea of Japan. The joint air patrols initially took place once a year but, since 2021, have been conducted biannually. Moreover, they have not infringed on territorial airspace except during the first patrol, but have routinely entered foreign ADIZs. It remains unclear whether they announce this in advance; however, several sources suggest China informs South Korea prior to the exercises.<sup>25</sup>

The composition of airplanes used in these joint air patrols has also remained fairly consistent. The People's Liberation Army Air Force (PLAAF) usually deploys two to four strategic long-range H-6K bombers, occasionally accompanied by J-16 fighters, while the Russian Air Force uses two TU-95MS long-range bombers, occasionally SU-35SM fighters, and an A-50 Airborne Early Warning and Control Aircraft. The TU-95 bomber is capable of carrying nuclear weapons and nuclear-armed cruise missiles. The graph below shows the composition of the planes throughout the exercises.

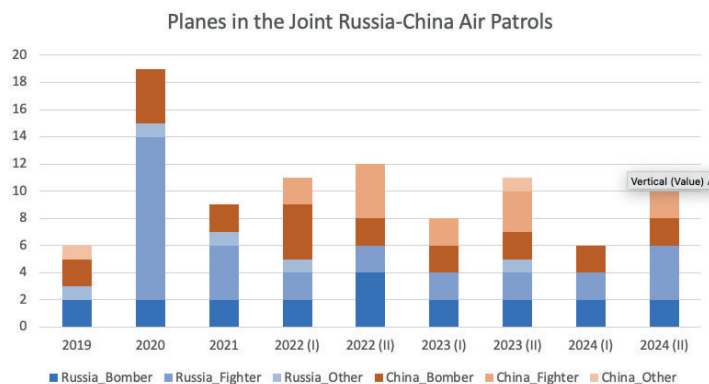


Figure 2. War planes in the joint China-Russia Air Patrols, 2019-2024<sup>26</sup>

<sup>24</sup> The Miyako Strait is one the two main straits leading from the East China Sea into the Pacific Ocean and is crucial to China's First Island Chain Strategy. Moreover, its proximity to Okinawa which houses a significant US base makes this a relevant strait.

<sup>25</sup> Stella Kim, „The Regional Order in Asia-Pacific: The Role of the Joint Sino-Russian Air Patrols and the Dokdo/Takeshima Dispute“ (Master thesis, University of Glasgow, 2022), <https://dspace.cuni.cz/bitstream/handle/20.500.11956/178360/120427343.pdf?sequence=1>.

<sup>26</sup> Russia\_Other and China\_Other refer to tanker planes or AEW&C planes. Some numbers are approximate, as in particular the numbers for fighter jets are not publicly available. If there was mention in the media of at least a fighter jet, it was counted as one, while if there was a plural but number still unknown, it shows as two in the graph. This is most like an under-estimation.

There are, however, notable exceptions. During the first joint air patrol in 2019, the Russian A-50 flew over the contested island of Dokdo/Takeshima.<sup>27</sup> By flying over the island, the plane entered territorial airspace, prompting Korean fighters to repeatedly request that the plane leave and to fire several warning shots. Whether South Korea actually fired at a Russian plane remains disputed by Russia to this day. However, firing at the Russian plane led to a minor dispute between Korea and Japan. Japan, who also claims the island, took offence with Korea defending it, resulting in an escalation of the already tense relations due to an ongoing trade dispute between both countries. Given the strong reactions from both countries over the warning shots, it might be reasonable to assume that Russia's denial of the incident is untrue.

The fourth joint air patrol in May 2022 occurred at the end of the QUAD Summit, sending a clear message that while the Western partnerships in the Indo-Pacific continue to grow, so too does the Chinese-Russian military alliance. More importantly, this patrol happened shortly after the full-scale Russian invasion of Ukraine, which indicates a subtler but nonetheless relevant aspect of the Chinese-Russian military relationship: while China does not publicly condone the Russian invasion – most likely to avoid criticism from its partner in the event of a Taiwan contingency – it still maintains the importance of a joint military cooperation. Though Beijing does not provide direct arms to Russia, this should still be seen as a clear signal to the United States, NATO, and the European Union (EU) to remain wary of China's close military ties to Russia<sup>28</sup>.

The fifth joint air patrol in November 2022 involved Russian aircraft landing at a Chinese airbase, further indicating their interoperability. The sixth joint air patrol in June 2023 was the first two-day air patrol. The seventh joint air patrol first included a Russian TU-142 aircraft, which is a reconnaissance and anti-submarine warfare aircraft, indicating possible integration with naval exercises. The eighth joint air patrol, in July 2024, was the first time the patrol took place in a different region – near Alaska – and marked the first joint Chinese-Russian manoeuvre that flew through the American

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<sup>27</sup> Dokdo (Korean) / Takeshima (Japanese) is claimed by both countries, however, currently administered by Korea.

<sup>28</sup> Hilde-Gunn Bye, „China and Russia With Joint Air Patrol off Alaska: First of Its Kind in the Area“, *High North News*, 6. August 2024, <https://www.highnorthnews.com/en/china-and-russia-joint-air-patrol-alaska-first-its-kind-area>.

ADIZ. It was also the first time all planes departed together from a base in northeast Russia. China has declared itself a 'near Arctic state' since its 2018 Arctic policy publication, indicating its interest in the Arctic: this joint patrol with Russia entering the Alaskan ADIZ only reinforces the message that China is expanding its presence in this region.<sup>29</sup> The most recent patrol, in November 2024, introduced a new Chinese H-6N bomber, which is also nuclear-capable, as well as a Y-9 intelligence-gathering aircraft and a Y-20 aerial tanker, which enables extended patrols through inflight refuelling.

Russia and China have referred to their patrols as 'joint strategic air patrols' since 2022, emphasising that they are a routine part of their annual cooperation plan and 'not targeted at any third party, nor does it have anything to do with current international and regional situations.'<sup>30</sup> The patrols are meant to 'further test and enhance the level of cooperation between the air forces of the two countries and deepen strategic alignment and practical cooperation.'<sup>31</sup> While this narrative suggests that there is nothing to worry about, the increasing frequency of these joint air patrols and their gradual expansion, testing for further interoperability, are developments that clearly need to be taken seriously.

<sup>29</sup> Seong Hyeon Choi, „Chinese, Russian bombers enter US air defence zone“, *South China Morning Post*, 26. Juli 2024, <https://advance-lexis-com.ubproxy.ub.uni-heidelberg.de/document/?pdmfid=1519360&crid=1175d7ef-190a-4045-a1d4-a5d043716a11&pddocfullpath=%2Fshared%2Fdocument%2Fnews%2Furn%3Acontentitem%3A6CJT-T6J1-DYRW-R06K-00000-00&pdcontentcomponentid=11314&pdteaserkey=sr7&pditab=allpods&ecomp=hc-yk&earg=sr7&prid=ea44c169-eb6-462a-a5fc-cdc955658f17>.

<sup>30</sup> Dzirhan Mahadzir, „UPDATED: Joint Russian, Chinese Pacific Bomber Flight Prompts Japan and South Korea to Scramble Fighters“, USNI News, 30. November 2024, <https://news.usni.org/2024/11/29/joint-russian-chinese-pacific-bomber-flight-prompts-japan-and-south-korea-to-scramble-fighters>; „China and Russia Conduct Joint Military Air Patrol near Japan“, JAPAN, *The Japan Times*, 30. November 2024, <https://www.japantimes.co.jp/news/2024/11/30/japan/china-russia-joint-air-patrol-japan/>.

<sup>31</sup> „Joint China-Russia air patrol not targeted at third party, China's Defense Ministry says“, *China Daily*, 25. Juli 2024, <https://advance-lexis-com.ubproxy.ub.uni-heidelberg.de/document/?pdmfid=1519360&crid=ff3873c4-83c7-4803-9b8d-83b11e2e5321&pddocfullpath=%2Fshared%2Fdocument%2Fnews%2Furn%3Acontentitem%3A6CJS-KDY1-JDJN-64BF-00000-00&pdcontentcomponentid=412302&pdteaserkey=sr16&pditab=allpods&ecomp=hc-yk&earg=sr16&prid=c00dcd07-8e34-44dd-b795-dc702b5b6a9b>.



## The Road Ahead

When assessing the nature of the Chinese-Russian military relationship, the main challenge remains to correctly estimate the true extent and nature of their cooperation. Given that information warfare and deception are core components of their military doctrines, they could be purposefully instigating Western fears about their relationship.<sup>32</sup> However, there are some clear takeaways from the emerging Chinese-Russian military partnership.

The joint Chinese-Russian aerial patrols indicate a variety of things. First, they mark a new era of the Chinese-Russian relationship that has taken the shape of an integrated, cooperative military partnership. The relationship continues to expand during Russia's aggression in Ukraine, implying that military cooperation remains more essential than what both would consider 'domestic disputes'. As these joint air patrols strengthen interoperability and highlight the mutual trust of the two forces, they pose a clear threat to the global order and to stability in the Indo-Pacific. They allow for the potential of coordinated multi-front confrontations by creating simultaneous critical situations in both Eastern Europe and East Asia, thus splitting NATO's focus.

Second, the partnership represents a rupture in the liberal, U.S.-led global order, with both countries seeking to establish a military presence in the highly contested Indo-Pacific region, countering the U.S. influence. Third, it highlights the need for U.S. allies in the region to cooperate more closely, particularly South Korea and Japan, which have had a tense relationship – especially in light of the aforementioned incident. Fourth, as China's Arctic interests begin to surface through the patrol near the Alaskan ADIZ, this also becomes a European question, given Europe's stakes in the Arctic.

Looking at historical examples, Joachim Krause<sup>33</sup> argues that alliances of a similar nature either did not last long or paved the way, directly or indirectly, for wars of unanticipated scale. As the breakdown of their alliance seems rather unlikely – it

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<sup>32</sup> Barry Pavel u. a., „Conclusion: Connecting the Dots and Defining the Challenge“, in *Russia-China Relations*, hg. von Sarah Kirchberger u. a., Global Power Shift (Springer International Publishing, 2022), 298, [https://doi.org/10.1007/978-3-030-97012-3\\_16](https://doi.org/10.1007/978-3-030-97012-3_16).

<sup>33</sup> Krause, „The Way Forward“.

would most probably require a regime change in either country – considering a war contingency is the next logical step.<sup>34</sup> This only underscores the importance of assessing their relationship, particularly their military interoperability, given the threat that their alliance represents.

On the other hand, Oriana Mastro<sup>35</sup> argues that China and Russia are ‘only’ moderately aligned: their alignment is primarily aimed at promoting China’s challenge to U.S. primacy in the Indo-Pacific, but not necessarily at China supporting Russia in doing the same in Europe. She further suggests that while Russia might not directly partake in combat against the United States over Chinese ambitions, the joint Chinese-Russian air patrols might indicate a greater realm of cooperation in the event of a conflict with Japan<sup>36</sup>, the most prominent U.S. ally in the region – and, historically, an adversary of both. This again highlights the potential threat posed by the Chinese-Russian military relationship and how it could further dismantle the U.S.-led order in the Indo-Pacific.

The EU has been seeking to establish its own presence in the Indo-Pacific for several years; however, it clearly lacks the military capacity to become a major player in the region. Some of its Member States have shown interest, but this remains limited. The growing Chinese-Russian military relationship should be of concern for Europe, given the ongoing war on the continent. Yet Europe lacks a clear strategy when interacting with China, naming the country simultaneously as a partner, economic competitor and systemic rival.<sup>37</sup>

While the emerging Chinese-Russian military alliance is primarily unfolding in the Indo-Pacific, it has clear implications beyond the region as well – most notably the shift of the global order towards multipolarity. The international community should remain vigilant regarding their relationship, particularly where their interests and goals might converge, as this could incentivise both into action. More importantly, this should serve as a wake-up call for Europe: should there be heightened forms of military aggression

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<sup>34</sup> Krause, „The Way Forward“.

<sup>35</sup> Mastro, „Sino-Russian Military Alignment and Its Implications for Global Security“, 246.

<sup>36</sup> Mastro, „Sino-Russian Military Alignment and Its Implications for Global Security“, 289.

<sup>37</sup> EU China Relations (EEAS, 2023), [https://www.eeas.europa.eu/sites/default/files/documents/2023/EU-China\\_Factsheet\\_Dec2023\\_02.pdf](https://www.eeas.europa.eu/sites/default/files/documents/2023/EU-China_Factsheet_Dec2023_02.pdf).

by China and Russia in the Indo-Pacific, it would divert U.S. attention and resources away from Europe, requiring greater European autonomy and independence to defend its own region.

**Table 1. Summary of Joint Air Patrols**

Date	Planes	Notes
23 July 2019	Chinese <ul style="list-style-type: none"> <li>• 2 H-6K bombers</li> <li>• (1 KJ-2000 AEW&amp;C plane)</li> </ul> Russian <ul style="list-style-type: none"> <li>• 2 Russian TU-95MS bombers</li> <li>• 1 Russian A-50 AEW&amp;C plane</li> </ul>	South Korean military shot several warning shots at the Russian plane, Russia denies incurring territorial airspace
22 December 2020 (518 days)	China <ul style="list-style-type: none"> <li>• 4 H-6K bombers</li> </ul> Russia <ul style="list-style-type: none"> <li>• 2 TU-95MS bombers</li> <li>• 1 A-50 AEW&amp;C plane</li> <li>• Ca. 12 SU-35SM fighter jets</li> </ul>	
19 November 2021 (332 days)	China <ul style="list-style-type: none"> <li>• 2 H-6K bombers</li> </ul> Russia <ul style="list-style-type: none"> <li>• 2 TU-95MS bombers</li> <li>• 1 A-50 AEW&amp;C plane</li> <li>• 4 SU-35SM fighter jets</li> </ul>	
24 May 2022 (186 days)	China <ul style="list-style-type: none"> <li>• 4 H-6K bombers</li> <li>• Min. 2 J-16 fighter jets</li> </ul> Russia <ul style="list-style-type: none"> <li>• 2 TU-95MS bombers</li> <li>• 1 Il-20 AEW&amp;C aircraft</li> <li>• Min. 2 SU-35SM fighter jets</li> </ul>	First joint military exercise after full scale invasion of Ukraine, took place at the same time as a QUAD summit.
30 November 2022 (190 days)	China <ul style="list-style-type: none"> <li>• 2 H-6K bombers</li> <li>• 2 J-16 fighter jets</li> <li>• 2 unidentified Chinese fighters</li> </ul> Russia <ul style="list-style-type: none"> <li>• 4 TU-95MS bombers</li> <li>• 2 SU-30SM and SU-35S fighter jets</li> </ul>	Both Russian and Chinese squadrons landed at the other's air base; Chinese destroyer sailed through Tsushima strait in the same week

6 June 2023 (188 days)	<p>China</p> <ul style="list-style-type: none"> <li>• 2 H-6K bombers</li> <li>• 2 unidentified fighter jets</li> </ul> <p>Russia</p> <ul style="list-style-type: none"> <li>• 2 TU-95MS bombers</li> <li>• 2 SU-35 fighter jets</li> </ul>	First two-day aerial patrol
15 December 2023 (192 days)	<p>China</p> <ul style="list-style-type: none"> <li>• 2 H-6K bombers</li> <li>• J-16 fighters</li> <li>• Y-8 plane</li> <li>• Unidentified fighter jets</li> </ul> <p>Russia</p> <ul style="list-style-type: none"> <li>• 2 TU-95MS bombers</li> <li>• 2 SU-35 fighter jets</li> <li>• 1 TU-142 patrol aircraft</li> <li>• Unidentified fighter jets</li> </ul>	New reconnaissance and anti-submarine warfare aircraft added to the patrol
25 July 2024 (224 days)	<p>China</p> <ul style="list-style-type: none"> <li>• 2 H-6K bombers</li> </ul> <p>Russia</p> <ul style="list-style-type: none"> <li>• 2 TU-95MS bombers</li> <li>• SU-30SM and SU-35S fighter jets</li> </ul>	Near Alaska, first time in US ADIZ, and first time departure from same base in northeast Russia, coincided with RIMPAC
29 November 2024 (127 days)	<p>China</p> <ul style="list-style-type: none"> <li>• 2 H-6N bombers</li> <li>• 2 J-16 fighter jet</li> <li>• 1 Y-9 intelligence gathering aircraft</li> <li>• 1 Y-20 tanker aircraft</li> </ul> <p>Russia</p> <ul style="list-style-type: none"> <li>• 2 TU-95MS bomber</li> <li>• 2SU-35 fighter jet</li> <li>• 2 MiG-31 fighter jets<sup>38</sup></li> </ul>	New bomber capable of long-range operations and nuclear capable; over 2 days, TU-95MS refuelled in the night

<sup>38</sup> 6 Russian war planes according to Yonhap

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# THE GEOPOLITICS OF ENERGY: IMPACT OF EUROPE'S DIVERSIFICATION ON RUSSIA'S INDO-PACIFIC ALLIANCES

*Priyanshu Agarwal*

## 1. Introduction

The global energy map has been reshaped since the beginning of Russia's invasion of Ukraine in 2022, with Europe's accelerated disengagement from Russian fossil fuels reconfiguring economic interdependencies and geopolitical relationships. The European Union's REPowerEU Plan, which was rolled out in response to the crisis in 2022, represents a pivotal shift in energy policy, marked by a rapid reversal of Russian gas imports in tandem with greater investment in renewable energy sources, liquefied natural gas (LNG) infrastructure, and new supply relationships.<sup>1</sup> The policy shift, driven by the dual demands of energy security and climate goals, has induced Russia to redirect its energy exports to the Indo-Pacific states, and thereby strengthening ties with China, India, and other Southeast Asian countries. Russia's shift to the east, however, remains full of challenges. Its growing reliance on a small number of large Asian buyers, especially China, creates new vulnerabilities and recreates some of the interdependencies that characterised its relations with Europe in previous years. At the same time, Western sanctions and regulatory pressures continue to erode Moscow's ability to stabilise its energy revenues and maintain its global influence.

This paper applies a mixed-methods approach, integrating qualitative content analysis of European Commission and Indo-Pacific governments' policy documents with quantitative trade data supplied by Eurostat and the International Energy Agency (IEA). It uses the balance-of-power theory and energy-security concept to examine how Europe's diversification away from Russian energy is reshaping global alliances. Through the analysis of trade data and policy documents, this chapter contribution explores how energy-security concerns, power balancing, and diversification strategies

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<sup>1</sup> European Commission. "REPowerEU: Affordable, Secure and Sustainable Energy for Europe." Accessed May 1, 2025. [https://commission.europa.eu/topics/energy/repowereu\\_en](https://commission.europa.eu/topics/energy/repowereu_en).

interact to create new opportunities and risks for all actors involved. The paper seeks to address two related questions:

1. How has Europe's energy decoupling reshaped Russia's economic and diplomatic strategies in the Indo-Pacific?
2. What are the long-term implications for global energy markets and regional security architectures?

Through a qualitative examination of these dynamic variables, the study illustrates that energy forms the central axis of 21st-century geopolitical reorientation, where economic interdependence and strategic competition intersect within a fragmented and multipolar world order.

## 2. Historical Context: Russia-Europe Energy Relations

The energy relationship between Russia and Europe has been defined by deep interdependence since the 1970s, when the Soviet Union began exporting oil and gas to Western Europe. By 2021, Russia supplied 45% of the European Union (EU)'s natural gas imports and 27% of its crude oil, with Germany receiving 65% of its gas via pipelines like Nord Stream 1.<sup>2</sup> Cheap Russian energy supplies supported economic growth in Europe over several decades, particularly in Germany. The steady access to affordable Russian gas and oil was fundamental to the expansion of Germany's industrial sector, which became a key part of the country's manufacturing strength. This dependence on low-cost Russian energy helped German industries stay competitive internationally and contributed to economic stability in the wider EU. This symbiosis emerged from Europe's need for affordable energy and Russia's reliance on hydrocarbon revenues, which accounted for 45% of its federal budget pre-2022.<sup>3</sup> The infrastructure underpinning this relationship included four major pipeline systems: Nord Stream I (55 billion cubic metres (bcm)/year), Yamal (33 bcm/year), Brotherhood (40 bcm/year), and TurkStream (31.5 bcm/year).<sup>4</sup> These networks created a 'mutually

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<sup>2</sup> Gross, Samantha, and Constanze Stelzenmüller. "Europe's Messy Russian Gas Divorce." Brookings Institution, June 18, 2024.

<sup>3</sup> Morningstar, Richard L., et al. "Reducing Europe's Reliance on Russian Energy Imports: Key Strategies under Five Scenarios." Atlantic Council, March 2024.

<sup>4</sup> CEENERGYNEWS. "Can Russian Pipeline Gas Restart After a Peace Deal?" CEENERGYNEWS, accessed May 2, 2025. <https://ceenergynews.com/oil-gas/can-russian-pipeline-gas-restart-after-a-peace-deal/>.



assured dependency' wherein Europe required stable supplies for industrial and household needs, while Russia needed EU markets to finance its state budget and geopolitical ambitions.

However, this interdependence also carried inherent vulnerabilities. The 2006 and 2009 Russia-Ukraine gas disputes, which temporarily cut supplies to 18 European countries, exposed the risks of transit dependence. Subsequent diversification attempts yielded mixed results. The Nord Stream II pipeline (completed in 2021 but never operational) aimed to bypass Ukraine but faced opposition from the United States and Eastern EU members over energy security concerns. The South Stream venture, intended to supply Southern Europe with natural gas via the Black Sea, was cancelled in 2014 due to disagreements with EU legislation, and was later replaced by the lowered capacity TurkStream pipeline to Turkey.<sup>5</sup> Meanwhile, the EU's Third Energy Package (2009) sought to unbundle energy production from transmission, limiting Gazprom's control over pipeline infrastructure and prices.<sup>6</sup>

The February 2022 Russian invasion of Ukraine irrevocably shattered this decades-old energy compact. The EU has reduced Russian gas imports from 150 bcm in 2021 to 52 bcm in 2024, with pipeline deliveries plunging by almost 80%.<sup>7</sup> This decoupling was accelerated through three mechanisms: the REPowerEU plan's US\$210 billion investment in renewables and LNG infrastructure, an EU regulation enabling Member States to ban Russian gas imports, and the G7 price cap on Russian oil (US\$60/barrel) that forced Moscow to sell at discounts averaging US\$32/barrel to Asian buyers.<sup>8</sup>

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<sup>5</sup> Gross, Samantha, and Constanze Stelzenmüller. "Europe's Messy Russian Gas Divorce." Brookings Institution, June 18, 2024.

<sup>6</sup> European Commission. "Questions and Answers: Third Legislative Package for an Internal EU Gas and Electricity Market." MEMO/11/125, March 2, 2011. Accessed May 1, 2025. [https://ec.europa.eu/commission/presscorner/detail/en/memo\\_11\\_125](https://ec.europa.eu/commission/presscorner/detail/en/memo_11_125).

<sup>7</sup> European Commission. "EU to Fully End Its Dependency on Russian Energy." IP/25/1131, May 15, 2025. Accessed May 5, 2025. [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_25\\_1131](https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1131)

<sup>8</sup> Lutz Kilian, David Rapson, and Burkhard Schipper, "The Impact of the 2022 Oil Embargo and Price Cap on Russian Oil Prices," Federal Reserve Bank of Dallas, Research Department Working Paper No. 2401, March 20, 2024. Accessed May 5, 2025. <https://www.dallasfed.org/media/documents/research/papers/2024/wp2401.pdf>.

Critical infrastructure shifts included Germany's rapid deployment of floating LNG terminals (FSRUs) and the United States becoming Europe's largest LNG supplier, providing 46% of imports by 2023.<sup>9</sup>

### 3. Europe's Path to Energy Independence: Diversification and Renewables

The EU's diversification strategy, spearheaded by the REPowerEU Plan launched in May 2022 after the Russian invasion of Ukraine, is the most monumental reshaping of the energy landscape of Europe since the post-World War II rebuilding era. With an initial investment of €210 billion, the plan aimed to reduce Russian fossil fuel imports by two-thirds within a year while accelerating renewable energy deployment. By 2025, the EU achieved a 66% reduction in Russian gas imports, decreasing from 155 bcm in 2021 to 52 bcm in 2024, with the share of Russian gas imports falling from 45% to 19%.<sup>10</sup> This transformation was driven by four interrelated pillars: demand reduction, renewable energy acceleration, supply diversification and infrastructure modernisation. The REPowerEU Plan prioritised LNG imports from alternate sources like the United States, renewable hydrogen, and biomethane to replace 50 bcm of Russian gas annually. By 2024, renewable energy accounted for 45% of EU electricity generation, surpassing fossil fuels for the first time.<sup>11</sup> EU solar capacity surged to 338 gigawatt (GW), tripling over five years (2019 to 2024), while wind power expanded by 37% to 231 GW.<sup>12</sup> The REPowerEU Plan's demand-reduction measures, including energy transition policies, are projected to replace up to 100 bcm of natural gas by 2030, with annual savings of

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<sup>9</sup> European Commission. "Commission Approves €4.06 Billion German State Aid Measure to Support the Operation of Four Floating LNG Terminals." IP/24/6546, December 20, 2024. Accessed May 2, 2025. [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_24\\_6546](https://ec.europa.eu/commission/presscorner/detail/en/ip_24_6546).

<sup>10</sup> European Commission, Directorate-General for Energy. "REPowerEU 3 Years On: Commission Takes Stock of Progress to Phase Out Russian Fossil Fuels." May 16, 2025. Accessed May 1, 2025. [https://energy.ec.europa.eu/news/repowereu-3-years-commission-takes-stock-progress-phase-out-russian-fossil-fuels-2025-05-16\\_en](https://energy.ec.europa.eu/news/repowereu-3-years-commission-takes-stock-progress-phase-out-russian-fossil-fuels-2025-05-16_en).

<sup>11</sup> Agency for the Cooperation of Energy Regulators (ACER). "ACER's Monitoring Attests that Renewable Growth Is Accelerating the EU's Transition Away from Fossil Fuels." March 20, 2024. Accessed April 28, 2025. <https://www.acer.europa.eu/news/acers-monitoring-attests-renewable-growth-accelerating-eus-transition-away-fossil-fuels>.

<sup>12</sup> Molly Lempriere, "EU's Solar and Wind Growth Pushes Fossil-Fuel Power to Lowest Level in 40 Years," Carbon Brief, January 21, 2025. Accessed May 2, 2025. <https://www.carbonb>

15 bcm. By 2027, gas demand could fall by 40 to 50 bcm, accelerating the phaseout of Russian imports. Between 2021 and 2023, the EU slashed Russian gas imports by over 70%, from 150 bcm to 43 bcm. In 2024, however, this trend was reversed as the imports of Russian LNG increased by 12% (to 20 bcm) and piped gas increased by 26% (to 32 bcm), revealing underlying supply diversification vulnerabilities.<sup>13</sup>

Europe's import portfolio underwent seismic shifts as it reoriented towards non-Russian suppliers. But in the fourth quarter of 2024, Russia still accounted for 19% of EU gas imports (13.4 bcm), equally split between pipeline and LNG. The United States remained the top LNG supplier (43% share), while Norway provided half of pipeline gas. Despite 88% storage levels, wholesale prices rose 21% quarterly to €43/megawatt-hour (MWh). Although Russian imports dropped 70% since 2021, the EU continued receiving tangible gas amounts via Ukraine and Turkey.<sup>14</sup> France continues to be the largest importer of Russian LNG among EU Member States. The Institute for Energy Economics and Financial Analysis (IEEFA) reports that about 34% of France's LNG imports last year originated from Russia, totalling €2.68 billion. This represents a substantial rise of 81% compared to the previous year, 2023.<sup>15</sup> In the case of crude oil, Hungary has held firm at 4.8 million tons of imports, accounting for 42% of all deliveries, underscoring its continued reliance on Russian crude oil. Hungary also continues to rely heavily on Russian gas, expecting to receive 7.5 to 8 bcm from Russia via the TurkStream pipeline in 2025, which constitutes nearly all of its gas imports and demonstrates ongoing dependence despite EU diversification efforts.<sup>16</sup> Austria, meanwhile, remains contractually bound to buy Russian gas until 2040. It has traditionally been importing most of its gas from Russia, although recent events show

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<sup>13</sup> European Commission. "Roadmap towards Ending Russian Energy Imports." COM(2025) 440 final/2, May 12, 2025. Accessed May 2, 2025. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52025DC0440R%2801%29>.

<sup>14</sup> Energy Market Price. "One-fifth of the EU's Gas Imports in the Fourth Quarter Originated from Russia." April 3, 2025. Accessed May 5, 2025. <https://www.energymarketprice.com/home/en/news/1171924>.

<sup>15</sup> EnergyNews. "France, Europe's main importer of Russian LNG in 2024." March 6, 2025. Accessed July 27, 2025. <https://energynews.pro/en/france-europes-main-importer-of-russian-lng-in-2024/>

<sup>16</sup> Reuters. "Hungary Expects to Get up to 8 Bn Cubic Metres of Gas from Russia via TurkStream in 2025, RIA Reports." TradingView, March 28, 2025. Accessed April 29, 2025. [https://www.tradingview.com/news/reuters.com,2025:newsml\\_L5N3QB05C:0-hungary-expects-to-get-up-to-8-bn-cubic-metres-of-gas-from-russia-via-turkstream-in-2025-ria-reports/](https://www.tradingview.com/news/reuters.com,2025:newsml_L5N3QB05C:0-hungary-expects-to-get-up-to-8-bn-cubic-metres-of-gas-from-russia-via-turkstream-in-2025-ria-reports/).

some attempt at diversifying imports from Germany and other nations as a way of lessening this dependence. These ongoing dependencies present tangible challenges to the implementation of a unified EU energy policy.

Infrastructure modernisation also plays a pivotal role in enabling this diversification. Germany deployed four floating storage regasification units (FSRUs) by 2024, increasing its LNG import capacity by up to 5 bcm.<sup>17</sup> Europe's LNG import capacity has expanded by 31% since early 2022, with the EU adding 70.9 bcm of new regasification capacity, particularly in Germany, the Netherlands, and Greece, enhancing energy security and flexibility.<sup>18</sup> The Trans-European Networks for Energy (TEN-E) policy is indeed supporting the energy transformation by allocating significant funding to cross-border infrastructure projects, including hydrogen-ready pipelines. In 2024, the EU allocated nearly €1.25 billion to 41 cross-border energy infrastructure projects under the TEN-E framework, with a notable portion earmarked for electricity grid projects, including offshore and smart grids, according to the European Commission. Meanwhile, Azerbaijan's gas exports to Europe rose from 8.2 bcm in 2021 to 12.9 bcm in 2024, emphasising the growing importance of the Southern Gas Corridor.<sup>19</sup>

The European Commission's recently launched 'Roadmap to Fully End EU Dependency on Russian Energy' in May 2025 sets out a binding plan to phase out Russian energy imports by 2027. Major measures include banning new contracts for Russian gas importation and spot purchases after December 2025, targeting the estimated 19% share of Russian gas in EU imports in 2024.<sup>20</sup> In addition, the approach involves increased contract transparency and regular data reporting with the aim of tracking and preventing evasion of imposed restrictions. At the same time, the Net-Zero Industry Act foresees 40% domestic production of core clean-technology

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<sup>17</sup> The Maritime Executive. "Germany Adds Fourth FSRU Further Expanding Imports and LNG Supply Stability." March 15, 2024. Accessed May 6, 2025. <https://maritime-executive.com/article/germany-adds-fourth-fsru-further-expanding-imports-and-lng-supply-stability>.

<sup>18</sup> Institute for Energy Economics and Financial Analysis (IEEFA). "European LNG Tracker." Last updated February 2025. Accessed May 4, 2025. <https://ieefa.org/european-lng-tracker>.

<sup>19</sup> CEENERGYNEWS. "Azerbaijan Expands Energy Cooperation at Southern Gas Corridor Meetings." April 7, 2025. Accessed May 4, 2025. <https://ceenergynews.com>

<sup>20</sup> European Commission. "Roadmap to Fully End EU Dependency on Russian Energy." May 6, 2025. Accessed May 5, 2025. [https://commission.europa.eu/news/roadmap-fully-end-eu-dependency-russian-energy-2025-05-06\\_en](https://commission.europa.eu/news/roadmap-fully-end-eu-dependency-russian-energy-2025-05-06_en).

components by 2030, thus increasing EU energy independence.<sup>21</sup> Collectively, these steps represent a drastic change in EU energy policy, with the objective of promoting long-term resilience and lower vulnerability to geopolitical uncertainty.

Thus, Europe's energy diversification has significantly reduced Russia's influence and revenue from the European energy market. The EU's shift away from Russian gas and oil, accelerated by the war in Ukraine and subsequent sanctions, has led to a collapse in Russia's gas deliveries to Europe and forced Russia to seek alternative markets in Asia. This pivot has weakened Russia's traditional leverage over Europe and exposed its economy to new risks and dependencies, especially as Europe invests in renewables and alternative suppliers.

#### **4. Russia's Eastward Pivot: Energy Diplomacy and Strategic Realignment in the Indo-Pacific**

Russia's strategic reorientation towards the Indo-Pacific, accelerated by Western sanctions following its 2022 invasion of Ukraine, represents a fundamental shift in global energy geopolitics. Facing unprecedented restrictions on access to European markets and financial systems, Moscow has prioritised deepening energy ties with Asian nations to sustain its hydrocarbon-driven economy after the sharp decline in European demand under the REPowerEU plan. By 2025, China and India have become the primary buyers of Russian crude oil, together accounting for about 85% of Russia's seaborne crude exports.<sup>22</sup> For natural gas, Asia now consumes approximately 32% of Russia's total gas exports, with the majority going to China.<sup>23</sup> This pivot is not merely transactional but forms part of a broader geopolitical strategy to position Russia as an indispensable energy partner for Indo-Pacific states while undermining Western influence in regional security architectures.

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<sup>21</sup> European Cluster Collaboration Platform. "EU Clusters Talk: Net-Zero Industry Act: For Clean Tech Manufactured in Europe." March 6, 2024. Accessed May 4, 2025. <https://www.clustercollaboration.eu/content/eu-clusters-talk-net-zero-industry-act-clean-tech-manufactured-europe>.

<sup>22</sup> G. Sharma, "What Sanctions? 85% of Russia's Oil Finds Buyers in China and India," *Forbes*, August 18, 2024. Accessed May 1, 2025. <https://www.forbes.com/sites/gauravsharma/2024/08/18/what-sanctions-85-of-russias-oil-finds-buyers-in-china-and-india/>.

<sup>23</sup> GIS Reports. "Decline of Russian Gas Dominance in Europe." Last modified May 2025. Accessed May 6, 2025. <https://www.gisreportsonline.com/r/russian-gas/>.

Russia's pivot towards Asia in energy exports reflects both necessity and opportunity in the wake of Western sanctions and Europe's energy diversification. The Power of Siberia pipeline, which is in operation since 2019, has been a major pillar in this shift, with deliveries to China totalling 31 bcm in 2024 and is poised to grow further, showing how investments in infrastructure transform regional gas flows.<sup>24</sup> The Chinese Customs Department reported that bilateral trade between Russia and China soared to a record US\$245 billion in 2024, underscoring the centrality of energy to their economic relationship.

To offset lost European markets and navigate sanctions, Russia has rapidly assembled a 'shadow fleet' of over 500 tankers, facilitating discounted crude shipments to India and other Asian buyers. India's imports of Russian crude have surged, with Urals crude<sup>25</sup> comprising the bulk, highlighting Moscow's success in securing alternative outlets.<sup>26</sup> Simultaneously, Novatek's Yamal LNG and Arctic LNG 2 projects, with capacities of 17.4 and 19.8 million tons per year respectively, illustrate Russia's ambition to anchor itself in the Asian LNG market through partnerships with firms like Malaysian Petronas and Chinese companies.<sup>27</sup> But this shift has opened up new vulnerabilities: by 2024, almost half of Russia's crude exports were headed for China, giving Beijing greater pricing leverage and highlighting the dangers of reliance on a single market.

Russia's pivot to the Indo-Pacific is marked by the deepening of energy diplomacy, the formation of security alignments, and an enhanced engagement with Southeast Asia. Southeast Asia and the wider Asia-Pacific are identified as centrepieces of Russia's foreign policy in the 2023 Foreign Policy Concept, with energy exports

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<sup>24</sup> Reuters. "China Completes Full Pipeline for Power-of-Siberia Gas." December 2, 2024. Accessed May 6, 2025. <https://www.reuters.com/business/energy/china-completes-full-pipeline-power-of-siberia-gas-2024-12-02/>.

<sup>25</sup> Urals crude is Russia's primary export oil blend, characterized as a medium sour crude with an API gravity typically around 31-32° and sulfur content up to 1.3-1.4%. It serves as a key benchmark for Russian oil pricing, often traded at a discount to Brent crude due to its lower quality.

<sup>26</sup> The Hindu Business Line. "Crude Oil Imports: Urals Helps Russia Claw Back India Market Share in April." May 5, 2025. Accessed May 7, 2025.

<sup>27</sup> LNG Prime. "Novatek's Yamal Project Produces 100 Million Tons of LNG." September 11, 2023. Accessed May 5, 2025. <https://lngprime.com/asia/novateks-yamal-project-produces-100-million-tons-of-lng/91290/>.

being linked specifically to diplomatic clout.<sup>28</sup> In 2024, Russia increased oil exports to Indonesia and used ship-to-ship transfers near Malaysia and Singapore to facilitate trade despite looming western sanctions.<sup>29</sup> In addition to these aspects, Russia's active participation in ASEAN-led forums such as the East Asia Summit boosts its regional profile.<sup>30</sup> Bilateral trade data of Russia with Indo-Pacific partners further highlights the significance of Russia's pivot to the east. In April 2025, China accounted for about 47% of Russian crude oil exports and India for 38%, indicating Moscow's greater reliance on Asian markets.<sup>31</sup> Roughly over 95% of trade between Russia and China is now being settled in rubles or yuan.<sup>32</sup> Rosneft has a 49% stake in Nayara Energy's Vadinar refinery in India, a deal completed in 2017 and is India's largest foreign investment in the refining sector. But with the increasing Western sanctions, Rosneft is now considering selling this stake after being faced with challenges in the repatriation of profits due to financial, commercial and secondary sanctions imposed by the United States and EU since 2014 (and especially after February 2022).<sup>33</sup>

The International North-South Transport Corridor (INSTC), which connects India, Russia and Iran, has further strengthened this partnership by reducing cargo transit time by about 20 days and freight costs by up to 30% compared to traditional routes.<sup>34</sup> The alternative route not only enhances the energy security of India but also provides

<sup>28</sup> Ministry of Foreign Affairs of the Russian Federation. "The Concept of the Foreign Policy of the Russian Federation." March 31, 2023. Accessed May 2, 2025. [https://mid.ru/en/foreign\\_policy/fundamental\\_documents/1860586/](https://mid.ru/en/foreign_policy/fundamental_documents/1860586/).

<sup>29</sup> Reuters. "Russia Ramps Up Oil Products Supplies to Indonesia." April 17, 2025. Accessed April 30, 2025. <https://www.reuters.com/markets/commodities/russia-ramps-up-oil-products-supplies-indonesia-2025-04-17/>.

<sup>30</sup> Association of Southeast Asian Nations (ASEAN). "Overview ASEAN-Russia Dialogue Relations as of Sep 2024." September 2024. Accessed May 10, 2025. <https://asean.org/wp-content/uploads/2024/09/Overview-ASEAN-Russia-Dialogue-Relations-as-of-Sep-2024.pdf>.

<sup>31</sup> Vaibhav Raghunandan and Petras Katinas, "April 2025 - Monthly Analysis of Russian Fossil Fuel Exports and Sanctions," Centre for Research on Energy and Clean Air, May 14, 2025. Accessed May 10, 2025. <https://energyandcleanair.org/april-2025-monthly-analysis-of-russian-fossil-fuel-exports-and-sanctions/>.

<sup>32</sup> TASS. "Russia, China Carry Out More than 95% of Trade in Rubles, Yuan - Kremlin Aide." January 21, 2024. Accessed May 9, 2025. <https://tass.com/economy/1902325>.

<sup>33</sup> Business Standard. "Unable to Repatriate Earnings, Rosneft Looks for an Exit from Nayara Energy." March 21, 2025. Accessed May 9, 2025. <https://www.business-standard.com/companies/news/rosneft-nayara-energy-exit-india-reliance-adani-jsw-sanctions-125032100139>

<sup>34</sup> Logistics Insider. "INSTC: Redefining International Commerce through Connectivity." October 2023. Accessed May 10, 2025. <https://www.logisticsinsider.in/instc-redefining-international-commerce-through-connectivity/>.

a strategic insurance against possible interruptions in the Suez Canal and Red Sea, and thus a support to India's connectivity with Russia and Central Asia. In Southeast Asia, Russian energy and nuclear cooperation is expanding, with Vietnam signing a memorandum with Rosatom in 2025.<sup>35</sup> Meanwhile, Russia's 2024 mutual defence pact with North Korea included energy-for-arms exchanges, with over a million barrels of oil products reportedly shipped to North Korea, in violation of UN sanctions, destabilising Northeast Asia, and illustrating Moscow's reliance on rogue regimes to sustain its geopolitical ambitions.<sup>36</sup>

Thus, from a European perspective, the EU's accelerated energy diversification, marked by reduced Russian imports and expanded LNG and renewables, has directly pressured Moscow to seek new strategic and economic partnerships in the Indo-Pacific. This forced pivot not only diminishes Russia's leverage over Europe but also reconfigures global energy flows, compelling Moscow to deepen alliances with Asian states and multilateral forums. Europe's decoupling from Russian energy sources thus acts as a catalyst, accelerating Russia's eastward engagement and reshaping the geopolitical landscape in ways that may have long-term consequences for both regions.

## **5. Geopolitical Risks and Realities: Strategic Vulnerabilities in Russia's Indo-Pacific Energy Partnerships**

The strategic decoupling of Europe from Russian energy resources has led to a fundamental rethinking of power relationship dynamics in the Indo-Pacific region, as Moscow's shift towards eastern partners alters traditional regional alignments and

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<sup>35</sup> Associated Press. "Vietnam and Russia Sign an Agreement to Expand Cooperation on Nuclear Energy." January 14, 2025. Accessed May 10, 2025. <https://apnews.com/article/vietnam-russia-putin-nuclear-energy-ukraine-climate-832d3ff55fda8ed9d5d2a3f518e5d4c4>.

<sup>36</sup> Seatrade Maritime News. "Tankers Directly Shuttling Oil Between Russia and North Korea." November 22, 2024. Accessed May 11, 2025. <https://www.seatrade-maritime.com/regulations/tankers-directly-shuttling-oil-between-russia-and-north-korea>.



draws attention to inherent structural vulnerabilities. The shift has further advanced China as the lead buyer of Russian crude oil, as bilateral trade volumes grew to a record US\$244.8 billion in 2024.<sup>37</sup> The relationship dynamics between Russia and China face significant discrepancies. Despite the rhetoric of a no-limits partnership, China has used its position to secure favourable terms for energy imports. For the proposed Power of Siberia 2 pipeline, China reportedly asked Russia to sell gas at domestic Russian rates of about US\$60 per 1,000 cubic meters – roughly one-quarter of what China currently pays under the Power of Siberia 1 agreement (US\$260 per 1,000 cubic meters). Moreover, China was only prepared to buy a fraction of the pipeline's planned 50 bcm capacity.<sup>38</sup> This price pressure exemplifies the uneven nature of the relationship, with Russia increasingly dependent on Chinese markets.

Russia's heavy reliance on Asian markets for its energy exports creates significant vulnerabilities. The EU's plan to completely phase out all Russian energy imports, including LNG, by 2027 could severely impact Russia's remaining market in Europe. At the same time, India's status as the second-largest buyer of Russian fossil fuels provides some diversification, with crude oil making up 81% of these imports.<sup>39</sup> However India's crude import patterns show significant volatility, with volumes fluctuating based on global market conditions and pricing advantages.

Arctic LNG projects also face significant technological challenges due to Western sanctions. Despite official claims about the successes of import-substitution, Russia continues to struggle with LNG-related technology dependencies. The lack of technology has already forced Novatek to temporarily halt projects such as Murmansk LNG and Ob LNG. Even the flagship Arctic LNG-2 mega-project reportedly delivered only 1 million tons to China in 2024, far short of the planned 6 million tons.<sup>40</sup> Chinese

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<sup>37</sup> China Daily. "Bilateral Trade Poised for Steady Growth." May 8, 2025. Accessed May 11, 2025. <https://www.chinadaily.com.cn/a/202505/08/WS681bec79a310a04af22bdfcb.html>.

<sup>38</sup> The Moscow Times. "China Spikes Kremlin's Proposed Power of Siberia 2 Alternative." April 17, 2025. Accessed May 11, 2025. <https://www.themoscowtimes.com/2025/04/17/china-spikes-kremlins-proposed-power-of-siberia-2-alternative-a88767>.

<sup>39</sup> Vaibhav Raghunandan and Petras Katinas, "April 2025 - Monthly Analysis of Russian Fossil Fuel Exports and Sanctions," Centre for Research on Energy and Clean Air, May 14, 2025. Accessed May 10, 2025. <https://energyandcleanair.org/april-2025-monthly-analysis-of-russian-fossil-fuel-exports-and-sanctions/>.

<sup>40</sup> Sergey Sukhankin, "Russia's Optimistic Outlook in Post-2035 LNG Strategy Faces Long-Term Challenges," The Jamestown Foundation, April 1, 2025. Accessed May 10, 2025. <https://jamestown.org/program/russias-optimistic-outlook-in-post-2035-lng-strategy-faces-long-term-challenges/>.

investments in the Russian Arctic amount to US\$10 billion and include critical energy projects such as the Yamal LNG pipeline, where Chinese state company CNPC owns a 20% stake and as per contracts with ROVATEK, 50% of the production from these projects will be exported to China, thereby further increasing Russia's dependence.

To circumvent Western sanctions, Russia has assembled a 'shadow fleet' of over 500 tankers, including nearly 100 from Russia's pre-existing state fleet and over 400 tankers bought second-hand at an estimated cost of US\$14 billion. However, recent sanctions have significantly impacted this strategy. In January 2025, the Office of Foreign Assets Control (OFAC), US Treasury Department, sanctioned 183 vessels involved in the Russian energy trade, 158 of which were oil tankers. Analysis shows that these sanctions, along with earlier measures, have reduced active Russian shadow-fleet capacity by approximately 46%.<sup>41</sup> Indo-Pacific nations navigate complex choices between economic opportunities and Western alignment. U.S. sanctions under the Countering America's Adversaries Through Sanctions Act (CAATSA)<sup>42</sup> have deterred deeper defence-energy integration for some nations. Both Indonesia and the Philippines cancelled major defence deals with Russia amid fears of potential sanctions, though Indonesia has characterised its Su-35 fighter jet procurement as 'put on hold' rather than terminated.<sup>43</sup> Even traditional allies such as Vietnam are struggling to maintain strong economic ties with Moscow due to the pressure of Western sanctions.

The recent geopolitical changes have put considerable pressure on Russia's economy. As a result, the country has revised its projections for oil and gas export revenues for 2025 to 2027.

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<sup>41</sup> Craig Kennedy, "Moscow's Fading Shadow Fleet: Russian Oil Revenues are More Vulnerable than Ever," Navigating Russia (Substack), May 7, 2025. Accessed May 10, 2025. <https://navigatingrussia.substack.com/p/moscows-fading-shadow-fleet-russian>.

<sup>42</sup> CAATSA (Countering America's Adversaries Through Sanctions Act) is a U.S. law enacted in 2017 that authorizes sanctions against countries and entities engaging in significant transactions with Iran, North Korea, or Russia, particularly in sectors like energy and defense

<sup>43</sup> Richard Javad Heydarian, "US Sanctions Reversing Russian Gains in SE Asia," Asia Times, August 9, 2022. Accessed May 11, 2025. <https://asiatimes.com/2022/08/us-sanctions-reversing-russian-gains-in-se-asia/>.

The expected earnings for 2025 are now estimated at US\$200.3 billion, reflecting a 15% decrease from earlier projections. This revision highlights the financial difficulties facing Russia, which is already grappling with challenges arising from military expenditures related to the ongoing conflict in Ukraine.<sup>44</sup> As Europe decouples, the global energy flows are reordering the Indo-Pacific. Russia's increasing dependence on Asian markets, especially China, brings new vulnerabilities even as it provides alternative revenue streams. It has also prompted Russia to redefine its role in the global security architecture by increasingly positioning itself as a security actor and offering military cooperation and technology transfers, particularly where energy partnerships play a strategic role. However, such engagement remains largely limited to select countries, as most Indo-Pacific states remain cautious. China and North Korea are exceptions, expanding security ties, including arms deals, whereas India remains restrained and is wary of complicating its strategic autonomy. For Europe, the challenge is to balance short-term energy security with long-term strategy while keeping member states – with different energy needs and dependencies – in line.

## 6. Conclusion and Future Outlook

Europe's energy diversification is a game-changer in the geopolitical landscape, as it signifies a shift from dependence to strategic autonomy. It is not just about securing supply, but rather about redefining power across regions and reshaping international relationships. The modernisation of infrastructure and diversification of suppliers show that Europe can adapt when faced with big challenges. The geopolitical implications are huge. As Europe diversifies away from Russian energy, the vacuum has accelerated Moscow's shift to Asia, a process of asymmetrical interdependencies and built-in strategic vulnerabilities. The shift to the east has built a complex web of interdependencies connecting European energy decisions to Indo-Pacific security dynamics, thus illustrating how energy distribution increasingly shapes geopolitics in a multipolar world.

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<sup>44</sup> Offshore Technology. "Russia Reduces Oil and Gas Export Revenue Forecast by 15% for 2025–2027." April 23, 2025. Accessed May 11, 2025. <https://www.offshore-technology.com/news/russia-reduces-oil-and-gas-export-revenue-forecast-2025-2027/>.

Europe will need to meet several strategic imperatives in the future to protect its gains. Policy coherence throughout the EU is no less important, with intra-EU divisions on sanctions and diversification timetables risking shared leverage. Europe ought to lead thinking on energy security within its overall foreign policy agenda while being mindful of the interdependence between climate ambition and energy security. An acceleration of the Net-Zero Industry Act would minimise exposure to the vagaries of the market while creating strategic industrial strengths.

At the same time, improving coordinated monitoring of Russia's changing energy alliances and covert fleet operations would provide early warning of changes in patterns of trade. In addition, Europe will need to intensify its dialogue with Indo-Pacific partners beyond transactional levels, developing regular dialogues with concerned parties on energy security to predict secondary effects of European energy policymaking. Through such a comprehensive strategy, Europe can translate its achievements in diversifying energy into sustainable strategic benefit, ensuring resilience against short-term pressures as well as long-term structural challenges in a more complex global energy order. The path forward demands a balance between short-term security and long-term strategic vision, while promoting cohesion among different member states, recognising that energy policymaking today lies at the intersection of economic stability, climate action, and geopolitical security.

## About the Author

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Priyanshu has presented multiple papers at international conferences. He presented a paper at the International Conference on the Logistics and Geopolitics of Connectivity Diplomacy in Eurasia (JNU, Al-Farabi Kazakh National University, LexFEIM Research Centre). He also presented papers at the International Conference 'Central Asia's Transformations: Politics, Economy and Society' (Deutsch-Kasachische Universität, Almaty) and the 4th Manas Forum (Ibn Haldun University and Heydar Aliyev Center for Eurasian Studies, Istanbul). He has also published multiple articles in *The Financial Express* and journals such as *the International Journal for Policy Sciences and Law*. He holds a Master's in Political Science and a Bachelor's in Economics from the University of Delhi.



# AN ACTOR OR A FACTOR: WHAT ROLE FOR THE EU IN MARITIME SECURITY IN THE INDO-PACIFIC?

*Eva Pejsova and Piero Barlucchi*

## Executive Summary

Maritime security in the Indo-Pacific has become a key strategic interest for the European Union (EU). The 2021 Strategy for Cooperation in the Indo-Pacific (EUSIP) reaffirms Brussels' commitment and determination to act as a 'global maritime security provider' in the region, underscoring its ongoing contribution to safeguarding the safety and freedom of navigation. Yet, as of 2025, the EU's efforts in this domain continue to struggle for momentum. The return of geopolitics and great-power competition have sidelined the Union's traditional approach to maritime security – one centred on multilateralism and non-traditional security challenges. At the same time, the increased presence of European navies, namely those of France, Germany, the Netherlands, and Italy, has attracted greater international attention and raised the EU's security profile in the region.

The recent adjustment of Brussels' narrative towards becoming a 'smart security enabler,' encouraging Member States to use their advanced capabilities to build capacities and enhance interoperability with regional partners, reflects this new strategic reality. What does this shift reveal about the EU's actual role in maritime security in the Indo-Pacific? Can Brussels be an autonomous *actor* capable of shaping regional affairs in its own right? Or is it a mere enabling *factor* enhancing national interests and policies?

This paper takes stock of the various maritime security initiatives undertaken by the EU and its national capitals since the publication of the EUSIP, testing the effectiveness of the 'Team Europe' approach at sea. It argues that the intergovernmental and the national levels of engagement can be mutually reinforcing, provided they are supported by effective institutional coordination and coherent political messaging.

**Keywords:** EU Strategy for Cooperation in the Indo-Pacific, Maritime Security, EU–Asia relations, naval diplomacy, Team Europe

## Introduction

Maritime security lies at the heart of Europe's economic, strategic, and political interests in the Indo-Pacific. The safety, security, and stability of regional waterways that connect Europe to its production hubs and consumer markets in East Asia are vital to the world's largest trading bloc.<sup>1</sup> The European Union (EU) first articulated its ambition to become a global maritime security provider in the 2016 Global Strategy, a vision that gained further traction with the launch of the Coordinated Maritime Presence (CMP) concept – initially tested in the Gulf of Guinea in 2021. Within the Indo-Pacific, the Union's concerns focus primarily on China's growing maritime assertiveness and its expanding influence in the Indian Ocean. The 2021 Indo-Pacific Strategy and the 2023 update to the EU Maritime Security Strategy both underscore the need to secure sea lines of communication (SLOCs) and to promote freedom of navigation in the region as a highest priority.<sup>2</sup>

While the rationale, the ambition – and even a 'growing demand'<sup>3</sup> – for the EU to become a maritime security provider are evident, the key question has always been *how* to achieve it. Traditionally, the Union's main value-added contribution to regional maritime security lay in a) its technical expertise in addressing functional security issues such as seaborne crime, b) its normative power as a defender of multilateralism and rules-based order, and c) its low-key security profile, which made it an attractive partner to work with, without being entangled in great strategic powerplays<sup>4</sup>. However, rising volatility, weaponisation, and polarisation in the regional maritime security environment have relegated seaborne crime and environmental problems to lower tiers of national security priorities. Existing multilateral cooperative security

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<sup>1</sup> Benedetta Girardi, Paul van Hooft, and Giovanni Cisco. "What the Indo-Pacific Means to Europe: Trade Value, Chokepoints, and Security Risks". The Hague Centre for Strategic Studies Report, 2023, 1–23.

<sup>2</sup> European Council, "European Union Maritime Security Strategy," JOIN(2023) Final, March 10, 2023. European Commission, "The EU Strategy for Cooperation in the Indo-Pacific," JOIN(2021) 24 final. 2021.

<sup>3</sup> Sprenger, Sebastian, "EU defense chiefs eye ad-hoc, naval security forces — but not for the Hormuz Strait" DefenseNews, August 29, 2019. <https://www.defensenews.com/global/europe/2019/08/29/eu-defense-chiefs-eye-ad-hoc-maritime-security-forces-but-not-for-the-hormuz-strait/>

<sup>4</sup> Pejsova, Eva, "The EU as a Maritime Security Provider", EUISS Policy Brief, December 2019, <https://www.iss.europa.eu/publications/briefs/eu-maritime-security-provider>



mechanisms – such as the ASEAN Regional Forum (ARF) – have proved unable to resolve some of the lasting regional security challenges, including the South China Sea conundrum. This has prompted several regional actors to turn instead to more flexible and efficient bilateral and minilateral formats of security cooperation.<sup>5</sup> Finally, as the EU became increasingly critical of China – categorising Beijing as a ‘partner’<sup>6</sup>, ‘competitor’, and ‘systemic rival’ in its 2019 Strategic Outlook – it also began to align itself more closely with the U.S. policy.<sup>6</sup>

The publication of the EU Strategy for Cooperation in the Indo-Pacific (EUSIP) in 2021 marked a new chapter in Brussels’ engagement, raising expectations of a more tangible contribution to regional stability. Maritime security features in two priority areas, namely ‘Ocean Governance’ and ‘Security and Defence’, highlighting the EU’s interests, governing principles, and achievements in countering piracy, enhancing Maritime Domain Awareness, and supporting capacity-building initiatives. However, none of these initiatives managed to draw as much attention as the growing number of European naval deployments to the region since 2021.

France, Europe’s sole resident Indo-Pacific power, has been joined by Germany, the Netherlands, and Italy in a rare showcase of naval diplomacy, adding much-needed credibility and operational muscle to the EU’s rhetoric. Recognising the benefits of using the Member States’ advanced capabilities, the former EU High Representative/Vice President (HR/VP) Josep Borrell consequently portrayed the Union’s role as a ‘*smart security enabler*’ at the Shangri-La Dialogue in 2023<sup>7</sup> and 2024<sup>8</sup>. Stemming from a pragmatic realisation of its limitations as a security actor, the change of narrative may indeed be a smart way to promote the EU’s interests as part of a ‘Team Europe’ approach.

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<sup>5</sup> Gorana Grgić, “Bridges across Regions: The Effects of Euro-Atlantic and Indo-Pacific Cooperation on European Security Architectures,” *International Politics*, 2025.

<sup>6</sup> European Commission, “EU-China : a Strategic Outlook”, 2019 <https://commission.europa.eu/system/files/2019-03/communication-eu-china-a-strategic-outlook.pdf>

<sup>7</sup> Josep Borrell. “20th Asia Security Summit - The Shangri-La Dialogue: Josep Borrell Fontelles,” *Proceedings of the 20th Shangri-La Dialogue*, March 6, 2023, <https://web-opti-qa.iiss.org/globalassets/media-library---content--migration/files/shangri-la-dialogue/2023/provisional-transcripts/p-3/josep-borrell-fontelles-high-representative-vice-president-european-commission-eu---as-delivered.pdf>.

<sup>8</sup> Josep Borrell. “Shangri-La Dialogue: Speech by High Representative Josep Borrell on Security in the Asia-Pacific Region,” *European External Action Service - Website*, January 6, 2024. [https://www.eeas.europa.eu/eeas/shangri-la-dialogue-speech-high-representative-josep-borrell-security-asia-pacific-region\\_en](https://www.eeas.europa.eu/eeas/shangri-la-dialogue-speech-high-representative-josep-borrell-security-asia-pacific-region_en).

This paper examines the EU's evolving approach to maritime security in the Indo-Pacific since the launch of the EUSIP, seeking to assess the degree of actorness it exerts in this domain. Can the EU be an autonomous actor in maritime affairs—and if so, how? Or, have escalating geopolitical tensions undermined its leverage to the extent that it can only rely on its Member States? First, it looks at the EU's approach and instruments to promoting maritime security, pointing out successes and loopholes. Second, it focuses on the growing naval presence and other maritime-related activities of its Members States, namely France, Germany, the Netherlands, and Italy, analysing their complementarity with the EU's objectives. It concludes with a reflection on the challenges and opportunities of the 'Team Europe' approach, applied specifically to the case of maritime security in the Indo-Pacific. Overall, it argues that the inter-governmental and the national levels can be highly beneficial and complementary, provided they are combined with appropriate diplomatic messaging and institutional coordination.

### **The EU's value-added in maritime security in the Indo-Pacific**

The EU's approach to maritime security is based on a holistic understanding of the maritime domain, encompassing both traditional and non-traditional security concerns, and involving actors across the civilian-military as well as the public-private spectrum.<sup>9</sup> While such approach indeed grasps the complexity of maritime governance, it requires adequate coordination. In practice, the variety of issues and actors often entails problems of overlaps, duplication and competition. Already in 2015, there were reportedly 383 EU maritime-security related agencies, associations and departments, dealing with various aspects from shipping safety, marine environment, seaborne crime, illegal fishing, to external action.<sup>10</sup> The EU's thick net of over 40 maritime-related documents raises the issue of 'forum shopping'. Since there is no clear relation or hierarchy among these documents, actors might cherry-pick from different

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<sup>9</sup> Christian Bueger and Timothy Edmunds, "The European Union's Quest to Become a Global Maritime Security Provider," *Naval War College Review* 77, no. 1 (Winter 2023).

<sup>10</sup> Ioannis Chapsos, "Is Maritime Security a Traditional Security Challenge?," in *Exploring the Security Landscape: Non-Traditional Security Challenges*, ed. Anthony J. Masys, 1st ed. (Switzerland: Springer International Publishing, 2016), 59–78.

documents only certain issues undermining concerted action.<sup>11</sup> Inter-institutional and inter-agency competition is also problematic. For instance, while the Directorate-General for Maritime Affairs and Fisheries (DG MARE) oversees issues related to ocean governance, many of those are also on the agenda for cooperation with third partners, which is the competence of the European External Action Service (EEAS). Viewed from outside, the lack of a single point of contact when it comes to maritime security, and the overall complexity of the EU's institutional landscape represents a major setback to cooperation.

Overall, the EU's involvement maritime security in the Indo-Pacific rests on three main pillars: a) its own naval initiatives, b) cooperation with like-minded partners, and c) normative contribution. The EU's own naval presence is concentrated in the North-West Indian Ocean (NWIO), with two Common Security and Defence Policy (CSDP) missions ensuring freedom of navigation and vessel protection, namely the EUNAVFOR ATALANTA in the Arabian Sea and Operation ASPIDES in the Red Sea.<sup>12</sup> The EU Coordinated Maritime Presence (CMP) has been extended to the North-West Indian Ocean in 2022.<sup>13</sup> Although EU representatives and official documents hinted at the possibility of extending the tool further east, possibly even into the South China Sea (SCS), this option did not materialise due to a lack of consensus among Member States. Nonetheless, these intergovernmental instruments are among the most visible manifestations of the EU's maritime actorness, attracting considerable interest from external partners. Indeed, it was through its anti-piracy operation in the Arabian Sea that the EU managed to forge operational ties with key Indo-Pacific countries, including Japan, the Republic of Korea (ROK), India, and even China.<sup>14</sup>

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<sup>11</sup> João Almeida Silveira, "EU Maritime Strategies: The Conceptualization of the EU towards the Maritime Domain," *Relações Internacionais*, no. 57 (2018): 59–90.  
Bueger and Edmunds, "The European Union's Quest to Become a Global Maritime Security Provider."

<sup>12</sup> Piero Barlucchi, "From Atalanta to Aspides: Old and New Challenges for EU Maritime Operations," *IAI Commentaries* 24, no. 12 (March 19, 2024): 5.

<sup>13</sup> Niklas Nováky, "The Coordinated Maritime Presences Concept and the EU's Naval Ambitions in the Indo-Pacific," *European View* 21, no. 1 (2022): 56–65.

<sup>14</sup> Pejsova, "The EU as a Maritime Security Provider,".

The second strand of the EU's engagement relies on cooperation with partners. Both the EUSIP and the EU Maritime Security Strategy pledge to enhance dialogue and joint exercises with Indo-Pacific partners, with Japan and the ROK already actively participating in trainings with EUNAVFOR ATALANTA. Maritime security is also one of the four pillars of activities promoted by the EU's Enhancing Security Cooperation in and with Asia (ESIWA) initiative, coordinated by France and Germany, focusing on operationalising cooperation with Japan, the Philippines, India, Indonesia, the ROK, Singapore and Vietnam. One of the EU's main practical contributions to maritime security has been in the field of Maritime Domain Awareness. Since 2015, the Critical Maritime Routes in the Indian Ocean (CRIMARIO) has been building the capacity of regional partners through trainings and technical assistance to monitor their maritime domains, especially by its IORIS information-sharing platform.

Finally, the EU's normative leverage and expertise in international law can also serve as valuable assets for the region. Since 2016, the EU has taken a leading role in promoting international ocean governance under the UN Sustainable Development Goal (SGD 14) framework, with some notable outcomes, including the adoption of the High Seas Treaty in 2023. Europe's experience in addressing transnational maritime security challenges through multilateral channels has been especially useful in cooperation with ASEAN. A frequently cited success story is the EU's co-Chairmanship of the ARF Inter-Sessional Group on Maritime Security (2018-2021), which focused on law enforcement and crisis prevention aimed at easing tensions in the East and South China Seas. However, most of these initiatives remain confined to exchanges of best practices and lessons learnt, yielding few tangible results on the ground.

The one notable exception of a truly practical contribution to regional maritime security is the EU's 'carding system' to combat Illegal, Unreported and Unregulated (IUU) fishing. Building on its exclusive competence in the conservation of marine biological resources under the common fisheries policy, the EU launched the regulation on IUU fishing in 2010. This system evaluates national law enforcement capacities and issues formal warnings ('yellow card') or sanctions ('red card') to third countries not respecting international fishing regulations, banning imports of their seafood into the European market. Leveraging access to the European market, the carding system has

incentivised effective and positive change, for instance, in Thailand.<sup>15</sup> IUU fishing is a major problem for many South and Southeast Asian countries, and one where the EU can effectively help. Ironically, and regretfully, the carding system is officially not considered part of the EU's maritime security external action toolbox.

### **Where the EU does not reach...but its Member States do**

EU Member States are crucial to the implementation of the Union's ambitions in the Indo-Pacific. France, Germany, and the Netherlands – three countries that developed comprehensive national outlooks for the Indo-Pacific prior to 2021 – were instrumental in shaping the EUSIP, steering the drafting process on behalf of the twenty-seven Member States. Adopted by unanimity, the EUSIP is a consensus document that reflects a shared recognition of the region's importance to Europe's collective and national interests. In that regard, the Strategy serves as both an umbrella framework and a guiding reference for national policies and cooperative endeavours. All three countries have significantly stepped up their engagement in the Indo-Pacific, including through the deployment of naval assets – a particularly relevant development in the context of maritime security. In 2023, they were joined by Italy, in an unprecedented demonstration of Europe's naval capabilities and commitment to regional maritime affairs. The below section zooms in on the initiatives of these four Member States – France, Germany, the Netherlands and Italy – and their contributions to advancing Europe's maritime security interests in the region.

#### **France**

France is Europe's only resident power in the Indo-Pacific, with overseas territories that host 93% of its Exclusive Economic Zone, along with a permanent population and stationed military personnel – factors which justify its interest in regional maritime security. France was also the first European country to articulate its Indo-Pacific Strategy, launched in 2018 which combined hard-power elements – such as naval deployments, partnerships, and defence deals – with soft-powers tools, including a

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<sup>15</sup> Singchun Jutaporn. "Thailand: role model and bridge builder for EU-ASEAN cooperation in combatting IUU fishing", EIAS Policy Brief, No. 9, 2022, [https://eias.org/wp-content/uploads/2022/12/Thailand\\_-Role-Model-and-Bridge-BUILDER-for-EU-ASEAN-Cooperation-in-Combatting-IUU-Fishing.docx.pdf](https://eias.org/wp-content/uploads/2022/12/Thailand_-Role-Model-and-Bridge-BUILDER-for-EU-ASEAN-Cooperation-in-Combatting-IUU-Fishing.docx.pdf)

strong emphasis on environmental security, climate change, and multilateralism<sup>16</sup>. Overall, France has shaped and led the EU's Indo-Pacific agenda, widely seen as complementing and amplifying its own foreign policy interests.<sup>17</sup> A fervent proponent of greater European strategic autonomy, Paris positions itself as a stabilising, mediating or balancing power in the Indo-Pacific.<sup>18</sup>

The French naval presence in the Indo-Pacific is by far the EU's largest and most consequential. Since 2015, Paris has steadily increased its deployments, actively promoting the EU's interests in safeguarding freedom of navigation.<sup>19</sup> Its frequent missions demonstrate both capability and resolve, engaging in numerous activities and exercises with regional partners (see Table 1). Since 2021, France has conducted regular transits through the contested South China Sea and the Taiwan Strait, testing the limits of China's reactions.<sup>20</sup> Given its established naval footprint in the Indian Ocean, France is also a full member of regional multilateral initiatives such as the Indian Ocean Naval Symposium or the Indian Ocean Rim Initiative (IORA), while advocating for the EU's observer status in both. Paris plays a key role in the implementation of the EU's CRIMARIO project and leads the maritime security pillar of ESIWA. At an operational level, a French naval officer that serves as the EU liaison at Singapore's Information Fusion Centre.

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<sup>16</sup> Marianne Péron-Doise. "The Indian Ocean in France's Indo-Pacific Pivot," in *Cross Currents: The New Geopolitics of the Indian Ocean*, ed. David Brewster, Samuel Bashfield, and Justin Burke (Australia: National Security College Press, 2024), 173–88.

<sup>17</sup> Gudrun Wacker. "The Indo-Pacific Concepts of France, Germany and the Netherlands in Comparison: Implications and Challenges for the EU," *EUI RSC, Policy Paper* 2021/19 (2021); Reuben Y. Wong, *The Europeanization of French Foreign Policy France and the EU in East Asia* (New York: Palgrave MacMillan, 2006).

<sup>18</sup> Ross Jacob. "Macron's Indo-Pacific Balancing Act", *DCAP*, 28 June 2023, <https://dgap.org/en/macrons-indo-pacific-balancing-act> Ministère de l'Europe et des Affaires étrangères, "French Strategy in the Indo-Pacific", 2019.

<sup>19</sup> Valerie Niquet. "France Leads Europe's Changing Approach to Asian Security Issues", *The Diplomat*, 11 June 2016, <https://thediplomat.com/2016/06/france-leads-europes-changing-approach-to-asian-security-issues/>

<sup>20</sup> Pejsova, Eva. "The EU's Naval Presence in the Indo-Pacific: what is it worth?", *HCSS Report*, March 2023, <https://hcss.nl/wp-content/uploads/2023/03/03-Eva-Pejsova-European-naval-role-in-the-Indo-Pacific.pdf>

**Table 1: French Deployments in the Indo-Pacific.**

<b>Mission and Assets:</b>	<b>Year</b>	<b>Objectives</b>
Jeanne d'Arc Naval Mission. Usually: LHD Tonnerre Frigate Surcouf	Annual	Training.  Deployment of operational capabilities in areas of strategic interest.  Commitment to freedom of navigation and rules-based order.  Interoperability and regional cooperation.
Deployments and exercises of assets already deployed in the region.	Ad hoc	Countering IUU, blue crime and drug trafficking.  Routine patrols and surveillance.  Regional presence.
Clemenceau Mission: Carrier Strike Group <i>Charles de Gaulle</i> .	2019, 2021-2022, 2025	Power projection. Interoperability and cooperation with partners. Naval diplomacy. Demonstration of French capabilities.
Mission Marianne: SSN Emeraude BSAH Seine	2021	Naval diplomacy. Demonstration of French underwater capabilities. Extended patrol.
FREMM Lorraine & FREMM Bretagne	2023 & 2024	Demonstration of French power projection capabilities. Naval diplomacy. Building interoperability. Signal commitment to freedom of navigation and rules-based order.

## Germany

Germany's involvement in maritime security in the Indo-Pacific came as a surprise, given the country's traditionally low security profile and limited blue-water capabilities. Berlin adopted its Strategic Guidelines for the Indo-Pacific in 2020, signalling recognition of the region's strategic importance to German national interests. Given its high economic stakes, Germany seeks to strike a delicate balance between diminishing Beijing's strategic footprint and avoiding containment rhetoric or a hard-balancing approach.<sup>21</sup> This emphasis on economic and political dimensions broadens the French approach.<sup>22</sup> As a 'civilian' middle power renowned for its strong support of the rules-based international order, Germany anchors its policy in the promotion of multilateralism, inclusivity, and cooperative security – fully in line with the EU's overarching approach.<sup>23</sup>

The decision to deploy its frigate *Bayern* to the region in 2021 was highly symbolic. As a quintessential example of naval diplomacy, the mission aimed to show the flag, engage with regional partners through port visits and joint exercises, and underscore Germany's commitment to free and secure shipping lanes and a rules-based order at sea.<sup>24</sup> It also sought to reassure Indo-Pacific partners, as well as the United States, of Europe's strategic relevance in the region. The second deployment, involving the frigate *FGS Baden-Wurtemberg* and the logistics ship *FGS Frankfurt am Main* in 2024, attracted even greater international attention, particularly because of its transit through the Taiwan Strait.<sup>25</sup> To be sure, the practical contribution of these deployments remains limited. While participation in bilateral and multilateral exercises enhances

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<sup>21</sup> Rafał Ulatowski. "Germany in the Indo-Pacific Region: Strengthening the Liberal Order and Regional Security," *International Affairs* 98, no. 2 (2022): 383–402, <https://doi.org/doi:10.1093/ia/iia008>.

<sup>22</sup> Felix Heiduk. "Europe's Foray Into the Indo-Pacific: Comparing France and Germany," *European Review of International Relations* 9, no. 1 (2022): 52–82, <https://doi.org/10.1163/21967415-09010013>.

<sup>23</sup> Jens-Uwe Wunderlich and Chih-Mei Luo, "Germany's Evolving Role in Global Affairs: Positioning as a Middle Power in the Indo-Pacific Region," *Asia Pacific Viewpoint* 65, no. 3 (2024): 416–29.

<sup>24</sup> Bundeswehr. "Indo-Pacific Deployment 2021", 2021. <https://www.bundeswehr.de/en/organization/navy/news/indo-pacific-deployment-2021>

<sup>25</sup> Bundeswehr. "Indo-Pacific Deployment 2024", 2024. <https://www.bundeswehr.de/en/organization/navy/news/indo-pacific-deployment-2024>



interoperability, few would expect a German frigate to play a decisive role in an actual conflict in the region. That said, these missions carry important political symbolism: they signal that Germany cares – and is determined to match words with deeds.

**Table 2: German Deployments in the Indo-Pacific**

Mission and Assets:	Year	Objectives
Indo-Pacific Deployment 2021: Frigate Bayern	2021	<p>Naval diplomacy.</p> <p>Strengthen cooperation and interoperability with partners.</p> <p>Demonstrate alignment and commitment to regional security, international law and safety of shipping.</p>
Indo-Pacific Deployment 2024: frigate FGS Baden-Württemberg & replenishment ship Frankfurt am Main.	2024	<p>Naval diplomacy.</p> <p>Strengthen cooperation and interoperability with partners.</p> <p>Demonstrate alignment and commitment to regional security, international law and safety of shipping.</p> <p>Enhancing regional strategic profile.</p>

**The Netherlands**

By virtue of its rich trading and maritime tradition, as well as its export-oriented economy, the Netherlands has a vested interest in the freedom of navigation and shipping safety. In 2020, The Hague released its strategic document, *Indo-Pacific: Guidelines for Strengthening Dutch and EU Cooperation with Partners in Asia*.<sup>26</sup> As its title suggests, the strategy explicitly includes the EU dimension and underscores cooperation with partners as a key pillar. Echoing the French and the German strategic

<sup>26</sup> Government of the Netherlands. “Indo-Pacific: Guidelines for Strengthening Dutch and EU Cooperation with Partners in Asia,” 2020. <https://www.government.nl/documents/publications/2020/11/13/indo-pacific-guidelines>.

documents, the Dutch Strategy likewise promotes multilateralism and inclusivity as means to navigate the geopolitical tensions and the intensifying U.S.–China strategic competition. The Guidelines call for the EU to speak out more forcefully on international law, reaffirm the importance of rules-based multilateralism, and safeguard sea lines of communication (SLOCs), with special emphasis on promoting innovation, maritime security, and digital connectivity.

Like France and Germany, the Netherlands deployed its frigate HNLMS Evertsen to the Indo-Pacific in 2021 – this time as part of the British-led carrier strike group – underscoring the international character of its involvement. Later, in 2024, the frigate HNLMS Tromp was subjected to harassment by Chinese fighter jets, fuelling a controversial domestic debate in which critics warned of the potentially escalatory implications of such deployments.<sup>27</sup> Recently, The Hague has committed to sending a naval vessel to the Indo-Pacific once every two years to defend shared interests, advance bilateral relations, contribute to multilateral endeavours, and protect shipping safety.<sup>28</sup> As a major maritime nation, the Netherlands is also a party to the Regional Cooperation Agreement on Combating Piracy and Armed Robbery Against Ships (ReCAAP) since 2010 and remains actively involved in capacity-building and training on international law of the sea.<sup>29</sup>

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<sup>27</sup> Fred Sengers, “Europe must make a realistic commitment to the Indo-Pacific”, *The Diplomat*, 22 June 2024, <https://thediplomat.com/2024/06/europe-must-make-a-realistic-commitment-to-the-indo-pacific/>

<sup>28</sup> Kingdom of the Netherlands. “HNLMS Tromp Visited Jakarta”, 20 May 2024. <https://www.netherlandsandyou.nl/web/indonesia/w/hnlms-tromp-visited-jakarta>

<sup>29</sup> Government of the Netherlands. “Indo-Pacific: Guidelines for Strengthening Dutch and EU Cooperation with Partners in Asia,” 2020. <https://www.government.nl/documents/publications/2020/11/13/indo-pacific-guidelines>.

**Table 3: Dutch Deployments in the Indo-Pacific.**

Mission and Assets:	Year	Objectives
HNLMS Evertsen (as part of the British carrier strike group – HMS Queen Elizabeth)	2021	Naval diplomacy.  Support for the international rules-based order and law of the sea.  Regional cooperation and engagement with partners.  Demonstrate alignment and commitment to regional security, international law and safety of shipping.  Showcasing Dutch commitment to freedom of navigation and Indo-Pacific security.
HNLMS Tromp	2024	Naval diplomacy  Support for the international rules-based order and law of the sea.  Regional cooperation and engagement with partners.  Demonstrate alignment and commitment to regional security, international law and safety of shipping.  Enhancing regional strategic profile.

**Italy**

Finally, Italy has been a relative latecomer to Europe’s Indo-Pacific debate. While it did not actively contribute to the formulation of the EUSIP, it endorsed its principles and objectives shortly after publication.<sup>30</sup> Only in March 2025 did Rome take preliminary steps towards developing its own Indo-Pacific Strategy, framing the region as a

<sup>30</sup> Italy. “The Italian Contribution to the EU Strategy for the Indo-Pacific” (Rome: Italian Ministry of Defence, 2022).

‘functional extension’ of its so-called Enlarged (or ‘Global’) Mediterranean – a strategic area of interest extending to the western Indian Ocean.<sup>31</sup> Overall, Italy has broadened its traditionally economic outlook and reassessed its relations with China, notably by withdrawing from the Belt and Road Initiative (BRI).<sup>32</sup> Its engagement with regional partners focuses particularly on enhancing maritime security, as well as trade and technological cooperation, in line with its national security and economic priorities.<sup>33</sup> On the one hand, Italy’s pivot has been relatively quiet and informal, affording it more flexibility;<sup>34</sup> on the other, its participation in major strategic initiatives – such as the Global Combat Air Programme (GCAP) with the United Kingdom and Japan, the most advanced example of defence-industrial cooperation between Europe and Asia – positions it as a key contributor to the EU’s expanding security ambitions in the region.

The decision to deploy naval assets in 2023 was domestically controversial, given Italy’s limited military resources and the multiple challenges in its immediate neighbourhood, including the migration crisis in the Mediterranean. Italy has been a key player in the EU’s CSDP missions ATALANTA and ASPIDES, as well as an active participant in the European maritime security initiative in the Strait of Hormuz. By deploying further east, Italian naval missions aim to strengthen interoperability and reassure the United States and regional partners of Italy’s alignment and commitment to regional stability. To be sure, they also serve the pragmatic purpose of showcasing Italian naval technologies and industry in view of attracting investments (see Table 4). At the multilateral level, Italy joined the Indo-Pacific Oceans Initiative (IPOI) in 2023 and co-leads its ‘Science, Technology and Academic Cooperation’ pillar together with Singapore.

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<sup>31</sup> Emanuele Rossi. “Italy’s Indo-Pacific Committee charts the country’s strategic course”, *Decode39*, 20 March 2025. <https://decode39.com/10241/italy-s-indo-pacific-committee-charts-the-country-s-strategic-course/>

<sup>32</sup> Aurelio Insisa. “Timing Is Everything: Italy Withdraws from the Belt and Road Initiative,” *IAI Commentaries* 23, no. 67 (2023).

<sup>33</sup> Giulio Pugliese and Alice Dell’Era. “Italy’s Security Engagement in Northeast Asia,” *EUI, Policy Paper RSC* 2025/06 (2025).

<sup>34</sup> Lorenzo Termine. “The Engagement of Italy with Indo-Pacific Security: A Compass to Navigate Pitfalls and Advance Interests,” *EUI Policy Paper RSC* 2025/04 (2025).

**Table 4: Italian Deployments in the Indo-Pacific**

Year	Assets	Goals
2016-2017	<i>Carlo Bergamini / Carabiniere frigate</i>	<p>Naval industry showcase.</p> <p>Naval diplomacy.</p> <p>Freedom of Navigation</p> <p>Defence capacity building</p>
2023	<i>Offshore Patrol Vessel (OPV) PPA Francesco Morosini</i>	<p>Naval industry showcase.</p> <p>Develop defence and security ties.</p> <p>Strengthen cooperation and interoperability with partners.</p> <p>Naval diplomacy.</p> <p>Enhancing regional strategic profile.</p> <p>Demonstrate alignment (freedom of navigation, secure SLOCs, international rule of law etc).</p>
2024	<i>Cavour Carrier Strike Group</i>	<p>Promotion of the Italian shipping industry.</p> <p>Develop defence and security ties.</p> <p>Strengthen cooperation and interoperability with partners.</p> <p>Naval diplomacy.</p> <p>High-intensity training (notably exercise Pitch Black).</p> <p>Demonstrate political alignment.</p>
2024	<i>PPA Montecuccoli</i>	<p>Naval diplomacy.</p> <p>Strengthening relations with partners.</p> <p>Demonstrate alignment (with regional partners, the US and UN).</p>

2024-2025	<i>Amerigo Vespucci training ship</i>	Promotion of the made in Italy in the world. Soft Power. Training.
2025	<i>Frigate ITS Antonio Marcegaglia</i>	Naval diplomacy. Strengthen cooperation and interoperability with partners. Promotion of the Italian shipping industry.

### **'Team Europe' at sea?**

The EU's commitment to maritime security in the Indo-Pacific stems from its vested interest in preserving the safety and stability of regional waterways and, as such, it is unlikely to wane. The EUSIP has articulated the Union's ambitions and raised awareness of the Indo-Pacific's importance among all Member States, contributing to the formulation of their respective national approaches. Following geopolitical tectonic shifts – namely Russia's aggression against Ukraine in 2022, the Russia-China strategic alignment, and the reduced global security role of the United States – the need for greater European autonomy and involvement in international affairs has become even more apparent. More than ever, Brussels recognises that, to secure its interests and boost its relevance as a geopolitical actor, it must adapt its policies and make full use of all available means.

The growing engagement of European capitals in the Indo-Pacific comes at the right time, and it makes sense for Brussels to capitalise on it. The deployments of national navies fill an important gap in the EU's approach by providing outreach and operational underpinning to its political engagement, enhancing interoperability, and strengthening military-to-military relations with like-minded partners.<sup>35</sup> By doing so, they not only serve the interests of all EU Member states but also add a much-needed

<sup>35</sup> Pejsova, (ibid) "The EU's Naval Presence in the Indo-Pacific".

‘meat to the bones’ of the EU’s strategic agreements with regional partners. Indeed, the EU has encouraged its members to employ their navies since the 2014 Maritime Security Strategy and reiterated the importance of national naval presences in the EUSIP.<sup>36</sup> Against this background, shifting the narrative from being a ‘security provider’ to a ‘smart security enabler’ does not imply downscaling ambitions. Rather, it reflects a pragmatic recognition that the EU’s limited security toolbox simply cannot address the region’s evolving needs alone.

Yet, this does not mean the EU’s own strands of engagement have lost relevance. While great-power competition has weakened the effectiveness of multilateral cooperative mechanisms, promoting functional maritime security cooperation, rule of law at sea, marine environmental protection, and ocean governance remains as essential as ever. Advancing these areas may also help prevent further escalation of regional tensions. As it adapts to the new geopolitical reality, the EU can still leverage its experience and expertise in these domains, focusing on countering cross-cutting hybrid maritime challenges such as lawfare, disinformation, and cybersecurity at sea. Its normative power also remains valuable in setting standards and shaping regulations in emerging fields such as smart shipping, undersea infrastructure protection, and deep-sea mining. Indeed, the EU can still preserve its autonomous role, but it will only grow stronger through closer cooperation with its Member States. Mapping and coordinating national initiatives to limit duplication and enhance synergies – alongside aligning strategic communication – are key prerequisites to make the ‘Team Europe’ approach work to its best advantage in the Indo-Pacific and beyond.

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<sup>36</sup> European Council, “European Union Maritime Security Strategy,” 11205/14, June 24, 2014.

## About the Authors

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**Piero Barlucchi** is a PhD Researcher at the University of Genova, Italy. His work focuses on the drivers of European security and defence engagement in the Indo-Pacific. Before his doctoral studies, he served as a Project Officer at the Centre for Security Diplomacy and Strategy (CSDS) in Brussels, and gained further experience at the Centre for the Study of Democracy in Bulgaria. Piero has published with the CSDS Policy Brief series, IAI Commentaries, the European Policy Review, *Opinio Juris* and *China Files*.



# ECONOMIC IMPLICATIONS OF MARITIME SECURITY IN THE INDO-PACIFIC FOR EUROPEAN TRADE ROUTES

*Mohamad Zreik*

## Introduction

The Indo-Pacific is a crucial maritime hub for global trade, with key shipping routes – such as the Malacca, Sunda, and Lombok Straits – and dense networks of submarine cables serving as vital arteries for the movement of goods, services and information between the Pacific and Indian Oceans.<sup>1</sup> Approximately 40% of the European Union's (EU) foreign trade passes through the South China Sea, underscoring the region's importance to Europe's economic interests. In 2022, the Indo-Pacific accounted for 37% of EU imports and 25% of EU exports, reflecting the Union's substantial reliance on this region for its international trade.<sup>2</sup> However, growing instability – fuelled by geopolitical tensions and maritime security threats – poses significant risks to European trade and supply chains.

This paper examines the economic implications of maritime insecurity in the Indo-Pacific for European trade routes, focusing on how disruptions in maritime security affect trade efficiency, resource exploitation, and supply chain resilience. Through statistical modelling and data analysis, the paper aims to identify the economic risks associated with maritime instability and explore potential mitigation strategies through international economic partnerships and cooperative frameworks. The findings underscore the critical need for Europe to integrate maritime security into its broader economic strategies to safeguard its trade interests and ensure the stability of global supply chains.

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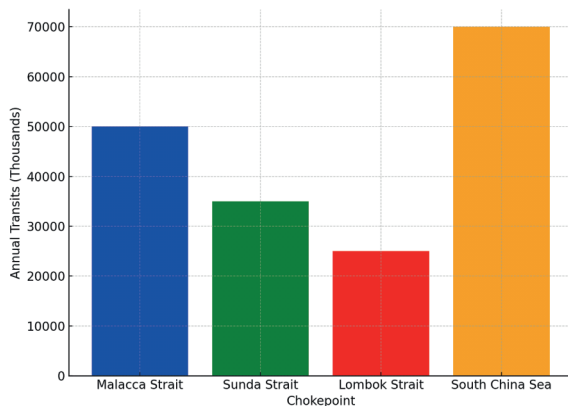
<sup>1</sup> Leino-Sandberg, Päivi, and Tapio Raunio. 2025. "From Bad to Worse: The Continuous Dilemma Facing Parliaments in European Economic and Fiscal Governance." *Government and Opposition* 60(1): 86–103.

<sup>2</sup> Eurostat. (2024, February 1). *EU trade with the Indo-Pacific region increased in 2022*. European Commission. <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20240201-1>

## Maritime Security in the Indo-Pacific: An Overview

Beyond its economic weight, the Indo-Pacific serves as a strategic nexus connecting Asia, Europe, and North America through critical sea lanes that carry over one third of global trade. Vital passages such as the Malacca, Sunda, and Lombok Straits facilitate commerce between the Pacific and Indian Oceans, with about 60% of global oil and gas shipments transiting these routes (see Figure 1).<sup>3</sup> For the EU, ensuring the security of these maritime arteries is essential, as billions of euros' worth of goods traverse them each day.

**Figure 1: Global Maritime Traffic – Key Chokepoints.**



Source: U.S. Energy Information Administration. (2024, June 25). World Oil Transit Chokepoints. Retrieved from [https://www.eia.gov/international/analysis/special-topics/World\\_Oil\\_Transit\\_Chokepoints](https://www.eia.gov/international/analysis/special-topics/World_Oil_Transit_Chokepoints), accessed March 27, 2025.

Maritime security challenges in the Indo-Pacific are diverse, with piracy, territorial disputes, and military presence posing significant risks to global trade. Piracy remains a threat, particularly in regions like the Strait of Malacca, where hijacking, theft, and armed robbery are common.<sup>4</sup> These incidents lead to delays, increased shipping costs, and higher insurance premiums for shipping companies.

<sup>3</sup> Bateman, Sam. 2021. "Sea Lines of Communication and Safety of Navigation." In *Routledge Handbook of the South China Sea*, edited by Zou Keyuan, 46–64. London: Routledge.

<sup>4</sup> Beckman, Robert. 2023. "Piracy and Armed Robbery against Ships in Southeast Asia: A Critical Evaluation with a Focus on the Singapore Strait." *Asia-Pacific Journal of Ocean Law and Policy* 8(2): 201–220.

The significance of these security risks is highlighted by the volume of maritime traffic in the Indo-Pacific. The Malacca Strait alone sees more than 50,000 transits annually and handles about one quarter of global trade.<sup>5</sup> Disruptions to such vital routes would have far-reaching effects on global supply chains. Understanding the piracy hotspots, such as the Malacca Strait, is essential for assessing risks to trade flows and developing strategies to maintain security and stability in these critical maritime corridors.

## Economic Impact of Maritime Insecurity on European Trade

### Impact on Trade Efficiency

The impact of maritime insecurity on trade efficiency is multifaceted. Shipping delays, caused by rerouted vessels, piracy, or disruptions from military activities, can significantly impact delivery timelines.<sup>6</sup> For instance, piracy hotspots like the Strait of Malacca and the South China Sea require ships to avoid certain regions, leading to longer routes.<sup>7</sup> The extended travel time results in operational inefficiencies, particularly for industries relying on just-in-time (JIT) models. Increased waiting times for port entry, coupled with uncertainty in arrival schedules, reduces the predictability and reliability of trade routes.

Moreover, industries such as electronics and automotive face supply chain bottlenecks when critical components are delayed due to rerouting or detours.<sup>8</sup> Such delays lead to the accumulation of inventory, which ties up capital and exacerbates storage costs, directly reducing profit margins.

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<sup>5</sup> The National Bureau of Asian Research. 2023. *Goeconomic Crossroads: The Strait of Malacca's Impact on Regional Trade*. Accessed March 26, 2025. <https://www.nbr.org/publication/geoeconomic-crossroads-the-strait-of-malaccas-impact-on-regional-trade/>.

<sup>6</sup> Arvis, Jean-François, Cordula Rastogi, Jean-Paul Rodrigue, and Daria Ulybina. 2024. *A Metric of Global Maritime Supply Chain Disruptions*. World Bank. Accessed April 5, 2025. <https://www.worldbank.org>.

<sup>7</sup> Phayal, Anup, Aaron Gold, and Brandon Prins. 2022. "Interstate Hostility and Maritime Crime: Evidence from South East Asia." *Marine Policy* 143: 105134.

<sup>8</sup> Corrado, Jonathan. 2023. "Strengthening the Indo-Pacific Chip Supply Chain: Opportunities and Obstacles for a Tech Alliance." In *Indo-Pacific Strategies and Foreign Policy Challenges*, edited by Hyun Ji Rim and James E. Platte, 98–116. London: Routledge.

## Shipping Costs and Trade Flows

One of the most direct economic impacts of maritime insecurity is the increase in shipping costs. These costs rise due to several factors, including increased fuel consumption from longer travel distances, rerouting due to piracy or conflict zones, and the escalation of insurance premiums as security risks heighten.<sup>9</sup>

To quantify this increase, we use the following equation:

$$\text{Adjusted Shipping Cost} = \text{Base Cost} + \text{Variable Costs} + (\text{Base Cost} \times \text{Risk Premium})$$

Where:

- Base Cost represents the standard cost of shipping goods through secure routes, including expenses like fuel, crew, and maintenance.
- Variable Costs are those that change depending on the specific route, such as port fees or customs charges.
- Risk Premium is the added cost due to security threats, including piracy, territorial disputes, and military conflicts. This premium is applied as a percentage of the base cost and fluctuates based on the level of threat.

For example, in the case of shipping a 20-foot container from Singapore to Rotterdam, the base cost might be €1,500. If the risk premium due to piracy and territorial disputes in the region increases by 15% – a figure that can be used to reflect moderate-to-high security threats in areas such as the South China Sea – the adjusted shipping cost becomes €1,725.

This 15% figure is indicative of a scenario where shipping companies and insurers assess the risks and adjust their premiums accordingly based on historical data, security reports, and geopolitical developments. For example, the International Maritime Bureau (IMB) and shipping companies use data on piracy frequency and the security environment to determine such premiums. While 15% may be considered moderate for certain regions, the premium could be higher in areas with more frequent or severe security risks.

<sup>9</sup> He, Zhangyuan, Pengjun Zhao, Shiyi Zhang, Zhaoxiang Li, Guangyu Huang, Caixia Zhang, and Yingnan Niu. 2024. "Analyzing Foreland Dynamics in China's Port Clusters Under Global Major Events (2019–2022) by AIS Trajectory Data." *Ocean & Coastal Management* 255: 107269.

## Case Study: Disruptions in the Indo-Pacific

The economic repercussions of maritime insecurity are visible in recent case studies. In 2020, piracy incidents in the Strait of Malacca increased by 20%, and shipping companies rerouted their vessels to avoid high-risk zones.<sup>10</sup> This change in routing added an estimated 8% to shipping costs due to increased fuel consumption and longer travel times. As a result, the average cost of shipping between Southeast Asia and Europe increased by €500 per container, translating into an aggregate loss of over €1 billion for European industries relying on these routes.<sup>11</sup>

Similarly, in the South China Sea, escalating territorial disputes led to significant uncertainty. Trade volume between Europe and Southeast Asia dropped by 4% in 2019, as European companies diversified trade routes to reduce over-reliance on specific markets and enhance supply chain resilience in response to regional uncertainties (see Figure 2).<sup>12</sup> This decrease in trade volume, reflects the economic costs of disrupted shipping flows and the broader uncertainty caused by regional tensions.

The data for 2015 onwards is used due to the availability of more consistent and detailed maritime security and trade flow statistics starting from that year. This period also marks a significant increase in regional maritime insecurity, including higher piracy rates and escalating territorial disputes, which directly impacted European trade flows.

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<sup>10</sup> ReCAAP Information Sharing Center. 2022. Annual Report 2022: Piracy and Armed Robbery Against Ships in Asia. Accessed March 29, 2025. <https://www.recaap.org/resources/ck/files/reports/annual/ReCAAP%20ISC%20Annual%20Report%202022.pdf>.

<sup>11</sup> Information Fusion Centre. 2022. Annual Report 2021. Singapore: Information Fusion Centre. Accessed April 4, 2025. <https://www.ifc.org.sg/>.

<sup>12</sup> ASEAN Secretariat. Trade Annually. Accessed March 30, 2025. <https://data.aseanstats.org/trade-annually>.

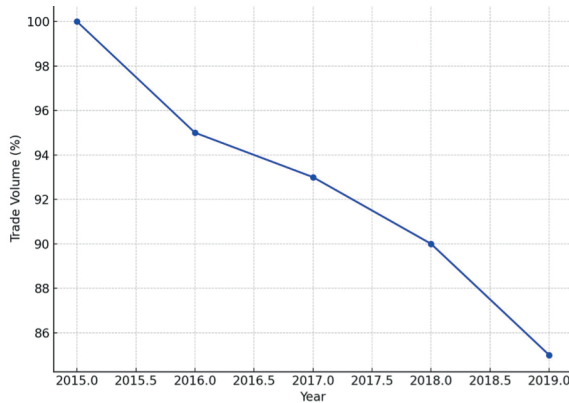


Figure 2: Trade Volume Reduction Due to Maritime Insecurity between Europe and Southeast Asia (since 2015).

Source: Butts, Dylan. (2024, October 11). Global trade at risk as tensions escalate in South China Sea. CNBC. Retrieved from <https://www.cnbc.com/2024/10/11/global-trade-at-risk-as-tensions-escalate-in-south-china-sea.html>, accessed April 05, 2025. 27, 2025.

### Data Analysis: Statistical Modelling of Security Risks and Trade Volume

To assess the quantitative relationship between maritime insecurity and European trade volume, we employ a regression model that links piracy incidents, territorial disputes, and trade disruptions to changes in trade flows. The model is as follows:

$$\Delta \text{ Trade Volume} = \alpha + \beta_1 \times \text{Piracy} + \beta_2 \times \text{Territorial Disputes} + \beta_3 \times \text{Military Conflicts} + \epsilon$$

Where:

- $\Delta$  Trade Volume represents the change in the value of goods traded between Europe and the Indo-Pacific.
- Piracy, territorial disputes, and military conflicts are variables quantifying security risks in the region
- $\alpha$  is the intercept, and  $\beta_1$ ,  $\beta_2$ , and  $\beta_3$  are the coefficients representing the impact of each variable.
- $\epsilon$  is the error term.

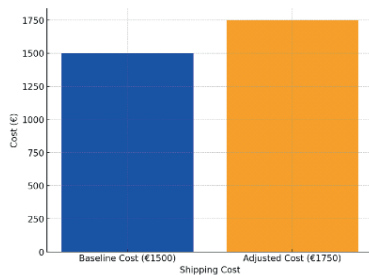
Using data from the International Maritime Organization (IMO) and European Commission trade statistics, preliminary regression results indicate that a 10% increase in piracy incidents correlates with a 3.2% decrease in trade volume between Europe and the Indo-Pacific. Similarly, a 5% increase in military conflicts reduces trade volume by 2.5%, underscoring the significant economic costs associated with security risks.

**Table 1: Impact of Increased Security Risks on Shipping Costs**

Route	Base Cost (€)	Risk Premium (%)	Adjusted Cost (€)
Singapore to Rotterdam	1,500	15%	1,725
Hong Kong to Hamburg	1,800	20%	2,160
Jakarta to Antwerp	1,200	10%	1,320

Source: International Maritime Organization (IMO) and European Commission trade statistics

Table 1 highlights the significant cost increases in shipping due to varying risk premiums. For example, a 20% increase in security risk for the Hong Kong-Hamburg route results in an additional €360 per container, demonstrating how security issues can substantially affect the economics of trade (see Figure 3).

**Figure 3: Shipping Cost Increase Due to Security Risks (representative example).**

Source: Torode, Greg, and Jonathan Saul. (2025, March 6). Shipping firms pull back from Hong Kong to skirt US-China risks. Reuters. Retrieved from <https://www.reuters.com/markets/shipping-firms-pull-back-hong-kong-skirt-us-china-risks-2025-03-06/>, accessed April 21, 2025.

## Resource Extraction and Economic Risks

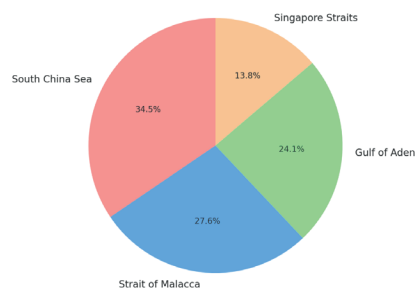
Maritime insecurity in the Indo-Pacific significantly impacts the extraction of critical resources, including oil, natural gas, and other commodities. For instance, piracy and territorial disputes in key shipping lanes like the Strait of Malacca have caused supply delays, resulting in a 5-10% increase in shipping costs and occasional production slowdowns for companies reliant on timely delivery of these resources. The disruption of resource supply chains not only leads to delays in extraction and transportation but also affects global commodity markets, leading to price fluctuations that ultimately impact European markets.<sup>13</sup>

<sup>13</sup> Diaz, Elena Maria, Juncal Cunado, and Fernando Perez de Gracia. 2024. "Global Drivers of Inflation: The Role of Supply Chain Disruptions and Commodity Price Shocks." *Economic Modelling* 140: 106860.

The Indo-Pacific is home to some of the world's largest offshore oil and gas reserves, particularly in the South China Sea and surrounding waters.<sup>14</sup> This region is essential for the extraction and transportation of energy resources, with several large-scale oil and gas platforms operating in the area. However, ongoing piracy, territorial disputes, and the growing presence of military forces in the region often result in delayed or suspended operations on these platforms.<sup>15</sup>

Piracy, for example, frequently targets oil tankers and offshore platforms, leading to a halt in production and transport. In 2020, piracy attacks in Southeast Asia increased by 30%, with 50% of incidents occurring in the South China Sea, one of the most critical areas for energy extraction (see Figure 4).<sup>16, 17</sup> Such disruptions can cause delays of up to 30-40% in shipping times and increase operational costs by 15-20%, particularly those that depend on these resources for their industrial operations.<sup>18</sup> Consequently, oil and gas producers may need to halt production temporarily or reroute shipments, leading to operational inefficiencies and a decrease in overall resource output.

**Figure 4: Impact of Piracy on Resource Extraction Disruptions.**



Source: Mui, Lee Yin. (2022, December 7). Piracy and armed robbery as an evolving threat to Southeast Asia's maritime security. Asia Maritime Transparency Initiative. Retrieved from <https://amti.csis.org/piracy-as-an-evolving-threat-to-southeast-asias-maritime-security/>, accessed April 23, 2025.

<sup>14</sup> Aswani, R. S., Shambhu Sajith, and Mohammad Younus Bhat. 2021. "Is Geopolitics a Threat for Offshore Wind Energy? A Case of Indian Ocean Region." *Environmental Science and Pollution Research* 28: 32683–32694.

<sup>15</sup> Sakhuja, Vijay. 2023. *Maritime Security Complexes of the Indo-Pacific Region*. New Delhi: Indian Council of World Affairs and Centre for Public Policy Research.

<sup>16</sup> International Maritime Bureau of International Chamber of Commerce. 2022. Piracy and Armed Robbery Report. Accessed April 7, 2025. <https://www.icc-ccs.org/reports/2022%20Annual%20IMB%20Piracy%20and%20Armed%20Robbery%20Report.pdf>.

<sup>17</sup> ReCAAP Information Sharing Center. Piracy and Armed Robbery Against Ships in Asia.

<sup>18</sup> Koray, Murat, Ercan Kaya, and M. Hakan Keskin. 2025. "Determining Logistical Strategies to Mitigate Supply Chain Disruptions in Maritime Shipping for a Resilient and Sustainable Global Economy." *Sustainability* 17 (12): 5261.



Figure 4 illustrates the distribution of piracy incidents in Southeast Asia, highlighting key areas where oil and gas extraction activities are most vulnerable. The percentages represent the proportion of piracy incidents reported in critical maritime regions such as the South China Sea, the Strait of Malacca, and the Gulf of Aden, which are vital for resource extraction.

### Impact on Resource Prices

For instance, in June 2015, the *MT Orkim Harmony*, a Malaysian oil tanker, was hijacked by eight Indonesian pirates in the South China Sea. The pirates transferred approximately 6,000 metric tonnes of petrol to another vessel before releasing the tanker. This incident led to a temporary halt in production and transport, highlighting the vulnerabilities in the region's maritime security.<sup>19</sup> Similarly, in 2012, the *MT Zafirah*, a Malaysian tanker, was hijacked near the Natuna Islands by eleven Indonesian pirates. The crew was left adrift in a lifeboat for two days before being rescued by Vietnamese fishing vessels, underscoring the risks faced by vessels operating in these waters.<sup>20</sup> Consequently, oil and gas producers may need to halt production temporarily or reroute shipments, leading to operational inefficiencies and a decrease in overall resource output.

<sup>19</sup> BBC News. (2015, June 19). *Malaysian Navy frees hijacked oil tanker Orkim Harmony*. BBC. <https://www.bbc.com/news/world-asia-33195382>

<sup>20</sup> Military History Wiki. (2012, November 18). *MT Zafirah hijacking*. Military Wiki. [https://military-history.fandom.com/wiki/MT\\_Zafirah\\_hijacking](https://military-history.fandom.com/wiki/MT_Zafirah_hijacking)

The disruption of resource extraction and transportation in the Indo-Pacific has a direct impact on global resource prices. When supply disruptions occur, the price of oil, natural gas, and other extracted commodities tend to rise, driven by reduced supply and higher uncertainty.<sup>21</sup> The following econometric model can help quantify the impact of supply disruptions on price fluctuations:

$$\Delta P = \epsilon \times \Delta S$$

Where:

- $\Delta P$  is the change in resource prices (such as oil or natural gas).
- $\epsilon$  is the demand elasticity, representing how sensitive the price is to changes in supply.
- $\Delta S$  is the change in supply caused by disruptions in extraction or transportation.

*Note: This equation assumes a simplified, linear relationship and does not account for the complexities of real-world market fluctuations, such as speculative behaviour, geopolitical events, or sudden demand shocks.*

For instance, if the supply of oil is disrupted by 5% due to piracy in the Strait of Malacca, and assuming a demand elasticity of -0.8, the price fluctuation would be:

$$\Delta P = -0.8 \times (-5\%) = 4\%$$

In this context, we assume a demand elasticity of -0.8, reflecting the relatively inelastic nature of oil demand. Oil, being a critical global commodity with limited immediate substitutes, tends to have a lower price sensitivity, especially in the short run. This is because industries, transportation, and consumers rely heavily on oil, and it is difficult to quickly reduce consumption in response to price increases. As a result, even significant price changes tend to have a smaller impact on the overall demand for oil.

Thus, a 5% reduction in supply could lead to a 4% increase in the price of oil, which would have downstream effects on European markets, where oil prices are highly sensitive to global changes in supply.

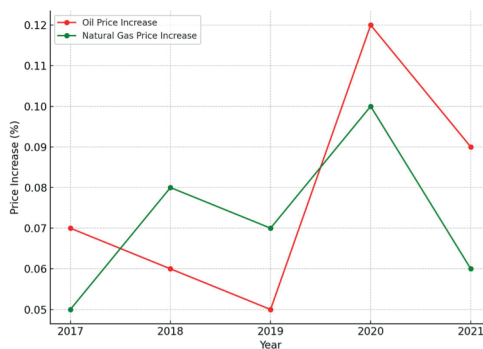
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<sup>21</sup> Yang, Shaopeng, and Yuxi Fu. 2025. "Interconnectedness Among Supply Chain Disruptions, Energy Crisis, and Oil Market Volatility on Economic Resilience." *Energy Economics* (108290).

## Statistical Data: Historical Data on Price Changes

Historical data from the International Energy Agency (IEA) and the World Bank on resource prices shows that significant price fluctuations often coincide with periods of heightened maritime insecurity. The data from 2017 onwards is used because it reflects a period of more readily available and consistent price data linked to piracy and territorial disputes. Furthermore, these years correspond to significant fluctuations in oil and natural gas prices directly influenced by increased maritime insecurity in the region. For example, during the 2017 piracy surge in the South China Sea, oil prices increased by an average of 7% over a three-month period due to supply chain disruptions (see Figure 5).<sup>22,23</sup> Similarly, the 2018 territorial disputes between Southeast Asian nations over oil exploration rights led to a 6% spike in natural gas prices, directly impacting the cost of European imports.<sup>24</sup> While the Organization of the Petroleum Exporting Countries (OPEC)'s production adjustments can influence global oil prices, natural gas prices, particularly in the Asia-Pacific region, are more directly impacted by regional geopolitical tensions and supply disruptions.

**Figure 5: Price Fluctuations of Oil and Natural Gas Due to Maritime Insecurity**



Source: Denamiel, Thibault, and Evan Brown. (2024, November 4). The state of maritime supply-chain threats. Center for Strategic and International Studies. Retrieved from <https://www.csis.org/analysis/state-maritime-supply-chain-threats>, accessed March 26, 2025.

<sup>22</sup> The World Bank. 2022. Global Economic Prospects, June 2022. Washington, DC: World Bank. Accessed March 19, 2025. <https://www.worldbank.org/en/publication/global-economic-prospects>.

<sup>23</sup> UNCTAD. 2019. Review of Maritime Transport 2019. UNCTAD. Accessed April 7, 2025. <https://unctad.org/webflyer/review-maritime-transport-2019>.

<sup>24</sup> OECD and EUIPO. 2021. Misuse of Containerized Maritime Shipping in the Global Trade of Counterfeits. OECD. Accessed March 24, 2025. <https://www.oecd.org>.

Data from the period of military tensions in the region (2019–2020) also shows a significant uptick in commodity prices. During this period, oil prices saw a 12% increase in response to security risks along key shipping lanes, which contributed to global supply concerns and heightened production costs.<sup>25</sup>

### **Risk Management in Resource Supply Chains**

In response to these disruptions, resource supply chains have increasingly relied on alternative supply routes and diversified sources of extraction. For example, European companies have begun to invest in energy projects outside of the Indo-Pacific, including oil exploration in the Arctic and natural gas extraction in Eastern Europe.<sup>26</sup> The Northern Sea Route, once an underutilised passage, has gained attention as a potential alternative for transporting oil and gas from Russia to Europe, offering a route that bypasses potential disruptions in Southeast Asia. However, adverse climate conditions, freezing temperatures, and icy waters, alongside legal barriers, present significant challenges. Furthermore, the ongoing geopolitical context, including the sanctions regime and Europe's phased reduction of reliance on Russian oil and gas, particularly after the war in Ukraine, makes this route more complex and less feasible in the long term.<sup>27</sup>

Moreover, major energy players are diversifying their risk management strategies by establishing strategic reserves and entering into long-term contracts with alternative producers in stable regions. These strategies help mitigate the effects of sudden price increases and ensure a continuous supply of critical resources, even in times of geopolitical instability.

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<sup>25</sup> Department of State, U.S. 2024. "The United States' Enduring Commitment to the Indo-Pacific: Marking Two Years Since the Release of the Administration's Indo-Pacific Strategy." United States Department of State. Accessed April 3, 2025. <https://www.state.gov/the-united-states-enduring-commitment-to-the-indo-pacific-marking-two-years-since-the-release-of-the-administrations-indo-pacific-strategy/>.

<sup>26</sup> Mohan, Garima. 2020. "A European Strategy for the Indo-Pacific." *The Washington Quarterly* 43(4): 171–185.

<sup>27</sup> UNCTAD. 2024. Transit Coordinators. Accessed March 25, 2025. <https://unctad.org/topic/transport-andtrade-logistics/trade-facilitation/transit-coordinators>.

## Supply Chain Resilience in the Face of Maritime Threats

### Vulnerability of Supply Chains

Just-in-time (JIT) supply chains, which are highly optimised for cost efficiency and rapid delivery, are especially vulnerable to maritime security risks. A delay in the transport of components or finished goods due to piracy, territorial disputes, or military activity can have cascading effects on production timelines.<sup>28</sup> For instance, the automotive sector, which depends on the timely delivery of specific parts (such as semiconductors and vehicle components), is particularly sensitive to interruptions. Even small delays in shipping routes can halt production lines, leading to inventory shortages, lost sales, and increased operational costs.

The electronics and pharmaceutical industries also experience significant vulnerabilities, as they often rely on global supply chains that involve complex international trade routes. In these industries, delays can cause manufacturing disruptions, price increases for critical materials, and product shortages, all of which affect not only the supply chain but also end consumers.<sup>29</sup>

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<sup>28</sup> Lehmacher, Wolfgang. 2017. *The Global Supply Chain*. Cham: Springer.

<sup>29</sup> Tucker, Emily L., and Mark S. Daskin. 2022. "Pharmaceutical Supply Chain Reliability and Effects on Drug Shortages." *Computers & Industrial Engineering* 169: 108258.

## Quantitative Analysis: Measuring the Economic Cost of Delays

To measure the economic impact of delays due to maritime insecurity, a supply chain model can be used. The model takes into account both operational costs and the additional costs incurred from delays. The equation below helps to quantify the total economic cost associated with a delay in the supply chain:

$$\text{Total Cost} = \text{Operational Cost} + (\text{Delayed Cost} \times \text{Probability of Delay})$$

Where:

- Operational Cost is the standard cost of goods movement, including fuel, labour, and handling.
- Delayed Cost is the additional cost incurred due to the delay, which can include storage fees, labour costs for idle workers, or the opportunity cost of lost sales.
- Probability of Delay represents the likelihood that a security risk will result in a delay, quantified using historical data on disruptions in specific maritime routes.

For example, if the operational cost of shipping a container from Singapore to Rotterdam is €2,500 and the delayed cost per day of delay is €400, with a probability of delay of 0.15 (15%), the total cost would be calculated as follows:

$$\text{Total Cost} = 2,500 + (400 \times 0.15) = 2,500 + 60 = \text{€}2,560$$

In this case, a 15% probability of delay increases the cost of each shipment by €60. This equation specifically accounts for the potential cost of delays due to logistical disruptions, which may differ from the risk premium discussed earlier, as the premium primarily reflects the added cost from security threats or geopolitical risks. The equation here applies to situations like JIT supply chains, where the financial impact of delays is more direct and measurable. For JIT scenarios, this equation would be more applicable, while the risk premium equation is more appropriate when assessing overall security-related risk factors.

## Impact on Industries

Several industries in Europe are particularly vulnerable to the impacts of maritime insecurity. The automotive industry, for example, faces significant delays when the delivery of critical components such as semiconductors is interrupted.<sup>30</sup> A delay in these parts can halt vehicle production, leading to lost revenue and increased costs. According to a report by the European Automobile Manufacturers' Association (ACEA), a 10% increase in supply chain delays can reduce automotive industry output by up to 3%, costing the industry over €50 billion annually.

The electronics industry is also highly impacted, as components for devices like smartphones, computers, and televisions often pass through insecure maritime routes. In 2020, semiconductor shortages resulting from supply chain disruptions in the South China Sea and the Strait of Malacca contributed to a 15% increase in the price of consumer electronics in Europe.<sup>31</sup> These price increases are directly tied to delays and higher transportation costs resulting from maritime insecurity.

Similarly, the pharmaceutical industry depends on the timely delivery of raw materials, including specialised chemicals and biologics. Any delay in the shipment of these materials due to security risks can result in production stoppages, regulatory penalties, and potential harm to public health. For example, a 2019 analysis by the European Federation of Pharmaceutical Industries and Associations (EFPIA) estimated that delays in the shipping of active pharmaceutical ingredients (APIs) could increase the cost of drug production by up to 20%, severely affecting prices and availability in the European market.

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<sup>30</sup> Manley, Ross L., Elisa Alonso, and Nedat T. Nassar. 2022. "Examining Industry Vulnerability: A Focus on Mineral Commodities Used in the Automotive and Electronics Industries." *Resources Policy* 78: 102894.

<sup>31</sup> Corrado, Jonathan. Strengthening the Indo-Pacific Chip Supply Chain.

### Mitigation Strategies: Diversification and Alternative Routes

In response to maritime security threats, European industries have increasingly adopted mitigation strategies to safeguard their supply chains. One such strategy is the diversification of supply routes. While the Suez Canal remains the primary and most important passage for goods between Europe and Asia, the Cape of Good Hope offers a potential alternative in the case of disruptions in the Suez. Although this route increases travel time and shipping costs, it is especially relevant when the Suez Canal faces blockages or other issues. However, due to challenges such as adverse climatic conditions and security risks, the Northern Sea Route is not a practical alternative to the Suez Canal for most industries. This route, requiring specialised vessels and subject to severe weather conditions, provides an option for diversification but should be considered cautiously. Companies looking to reduce their reliance on specific regions like China might find more effective diversification strategies by focusing on the broader ASEAN region. With ASEAN's growing economic importance and trade volume, expanding supply routes to connect Europe with ASEAN markets allows companies to spread their risks and increase resilience against geopolitical tensions and supply chain disruptions in the Indo-Pacific.

Additionally, industries are increasingly shifting production to alternative locations closer to Europe. For instance, the automotive and electronics sectors are increasingly investing in manufacturing facilities in Eastern Europe and North Africa, reducing the distance goods need to travel by sea and mitigating the risks associated with long-distance shipping.<sup>32</sup>

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<sup>32</sup> Pavlínek, Petr. 2023. "Transition of the Automotive Industry Towards Electric Vehicle Production in the East European Integrated Periphery." *Empirica* 50(1): 35–73.



## The Role of International Economic Partnerships

The EU has been actively engaging with Indo-Pacific nations to bolster maritime security through various collaborative frameworks. These frameworks include security treaties, joint naval exercises, and trade agreements, such as the EU-ASEAN Maritime Security Initiative and the EU-India Strategic Partnership, aimed at ensuring safe and secure maritime routes. The EU's engagement with regional players, particularly through these cooperation frameworks, emphasises the importance of mutual cooperation in securing key sea lanes that are vital to global trade.<sup>33</sup> These partnerships highlight the shared commitment to enhancing maritime security and facilitating trade between the EU and ASEAN countries. Joint naval exercises between the EU and countries such as Japan, India, and Australia enhance maritime security by fostering cooperation in surveillance, piracy prevention, and response to natural disasters.<sup>34</sup>

Moreover, the EU's Comprehensive Strategy on Indo-Pacific provides a framework for expanding partnerships with regional nations to address emerging maritime threats. These engagements help to reduce the risk of disruptions in the shipping lanes, benefiting European markets by securing stable trade routes.

The EU-Asia trade relationship has seen significant growth over the past decade. In 2020, EU exports to Asia amounted to €182 billion, while imports from the region stood at €363 billion.<sup>35</sup> Over the last five years, EU-Asia trade volumes have increased by 10%, demonstrating the growing interdependence between the two regions.<sup>36</sup> The EU's strategic partnerships with Indo-Pacific countries have not only helped to secure maritime routes but also facilitated deeper economic integration, particularly in the fields of digital trade, energy, and manufacturing.

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<sup>33</sup> Koh, Tommy, and Lay Hwee Yeo, eds. 2020. *ASEAN-EU Partnership: The Untold Story*. Singapore: World Scientific.

<sup>34</sup> Odgaard, Liselotte. 2019. "European Engagement in the Indo-Pacific: The Interplay Between Institutional and State-Level Naval Diplomacy." *Asia Policy* 14(4): 129–159.

<sup>35</sup> Eurostat. 2021. Asia-Europe Meeting: EU Trade Deficit at €244 Billion. Accessed April 4, 2025. <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/edn-20211124-1>.

<sup>36</sup> Directorate-General for Trade, European Commission. 2024. European Union, Trade in Goods with Country. Accessed April 4, 2025. [https://webgate.ec.europa.eu/isdb\\_results/factsheets/country/details\\_pakistan\\_en.pdf](https://webgate.ec.europa.eu/isdb_results/factsheets/country/details_pakistan_en.pdf).

Global organisations like the IMO play a crucial role in mitigating maritime risks. The IMO's regulatory framework, particularly the International Ship and Port Facility Security (ISPS) Code, aims to enhance maritime safety and prevent threats such as piracy and terrorism.<sup>37</sup> The IMO's conventions, alongside EU partnerships, provide essential standards and protocols to reduce the risks posed by maritime insecurity, ensuring that global trade remains uninterrupted.

A key example of EU-Asia maritime cooperation is the EU-ASEAN Maritime Security Initiative which was launched to enhance cooperation on maritime security issues. Its structure includes the EU-ASEAN High-Level Dialogue (HDL), the ASEAN Regional Forum (ARF), and initiatives like CRIMARIO II, which focuses on improving maritime domain awareness. The goal is to strengthen regional security by addressing threats such as piracy, Illegal, Unreported, and Unregulated (IUU) fishing, and maritime terrorism. Collaborative efforts also aim to improve legal frameworks, boost operational capacity, and promote sustainable maritime practices. The outcomes include better information sharing, joint security exercises, and policy development for the region's maritime security.<sup>38</sup> This partnership has focused on building capacity for Southeast Asian nations to combat piracy, improve port security, and enhance maritime safety.<sup>39</sup> The establishment of a Joint Maritime Cooperation Committee in 2019 facilitated the exchange of best practices and resources between the EU and ASEAN members, demonstrating the importance of regional partnerships in safeguarding maritime trade.<sup>40</sup>

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<sup>37</sup> Mensah, Thomas A. 2004. "The Place of the ISPS Code in the Legal International Regime: For the Security of International Shipping." *WMU Journal of Maritime Affairs* 3: 17–30.

<sup>38</sup> European External Action Service (EEAS). 2021. *Maritime Security for Europe and Asia: Five Crosscutting Areas of Action*. Retrieved from [https://www.eeas.europa.eu/sites/default/files/factsheet\\_maritime\\_security.pdf](https://www.eeas.europa.eu/sites/default/files/factsheet_maritime_security.pdf), accessed July 15, 2025.

<sup>39</sup> Giese, Dominik. 2020. "The ASEAN Way Versus EU Maritime Multilateralism: The Unintended Consequences of EU-ASEAN Maritime Security Cooperation." In *The Unintended Consequences of Interregionalism*, edited by Elisa Lopez-Lucia and Frank Mattheis, 85–105. London: Routledge.

<sup>40</sup> Chang, Yen-Chiang. 2022. "Toward Better Maritime Cooperation—A Proposal from the Chinese Perspective." *Ocean Development & International Law* 53(2–3): 85–104.

## Policy Recommendations for Strengthening European Maritime Security

To strengthen its maritime security policies, Europe should enhance its engagement with Indo-Pacific nations through increased investments in maritime security infrastructure and capacity-building programmes. This includes supporting regional countries in their naval capabilities, improving surveillance technologies, and enhancing rapid response mechanisms to mitigate disruptions caused by piracy or military conflicts.

Additionally, the EU should prioritise multilateral security initiatives that promote collaborative maritime security governance. Working with regional stakeholders to establish clear and robust policies will help safeguard the security of trade routes critical to European supply chains.<sup>41</sup>

To assess the impact of enhanced security policies, we use regression analysis to model the relationship between increased security measures and European trade volume. For instance, using a model that links maritime security investment with trade volume growth, we could hypothesise:

$$\Delta \text{Trade Volume} = \beta_0 + \beta_1 \times \text{Security Investments} + \epsilon$$

This equation can help forecast the potential growth in European trade resulting from investments in maritime security. Preliminary analysis shows a positive correlation, suggesting that increased security measures could lead to higher trade volumes by reducing disruptions and increasing confidence in maritime routes.

Further strengthening ties with key regional players, such as India, Japan, and Australia, will be crucial to ensuring the security of trade routes in the Indo-Pacific. Joint initiatives focused on intelligence sharing, regional naval cooperation, and trade facilitation will help mitigate the risks of maritime insecurity.

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<sup>41</sup> Pugliese, Giulio. 2023. "The European Union's Security Intervention in the Indo-Pacific: Between Multilateralism and Mercantile Interests." *Journal of Intervention and Statebuilding* 17(1): 76–98.

A statistical cost-benefit analysis can help evaluate the effectiveness of these security policies. By quantifying the potential economic gains from reduced shipping disruptions and lower insurance premiums, the EU can justify investment in maritime security. For example, a 5% reduction in disruptions due to piracy could lead to savings of approximately €200 million annually, based on the EU's annual shipping-related costs.<sup>42</sup>

## Conclusion

Maritime insecurity in the Indo-Pacific significantly impacts European trade, raising shipping costs, delaying deliveries, and increasing uncertainty in global supply chains. By enhancing maritime security through collaborative frameworks and strategic investments, Europe can mitigate these risks and protect its trade interests.

Further statistical modelling and data collection are needed to quantify the precise economic impact of enhanced security measures on European trade. Future research could explore the long-term effects of maritime security investments on specific sectors, such as automotive and electronics, and identify the most cost-effective interventions.

Integrating maritime security into Europe's broader economic strategy is essential for safeguarding trade routes and ensuring the resilience of global supply chains. By enhancing international cooperation and leveraging data-driven policies, Europe can secure its position as a key player in the global economy while mitigating the risks posed by maritime insecurity.

## About the Author

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<sup>42</sup> European Commission. 2014. Report from the Commission to the European Parliament and the Council on the Functioning of Directive 2010/65/EU on Reporting Formalities for Ships Arriving in and/or Departing from Ports of the Member States, COM(2014) 320.