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**PACIFIC ASIA:  
PROSPECTS FOR DEVELOPMENT**

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**SOUTHEAST ASIAN STATES AND EU COUNTRIES:  
PARAMETERS OF INTERACTION**

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**Abstract.** The interest of the Southeast Asian countries in the EU states is caused by both economic and strategic considerations, which laid the foundation for long-term cooperation in various directions. The article analyzes in detail the economic cooperation between the Southeast Asian states and the EU countries in various fields: trade, investment, financial assistance based on the use of various statistical data, first introduced into scientific circulation, which allows us to reasonably conclude that economic cooperation is mutually beneficial for both regions. Stable economic ties also affect the nature of political relations between the states of the region and the EU countries. The authors investigate different areas of cooperation between the regions in the strategic sphere, which was based on the signing of the Strategic Cooperation Agreement in 2020. Its adoption was the result of the European Union's awareness of the strategic importance of the Indo-Pacific region, of which the Southeast Asian countries are a key element, and the latter's interest in finding a "third party" in the context of the rivalry between the United States and China. The article analyzes the interaction between the Southeast Asian states and the EU countries in ensuring maritime security, countering terrorism and combating climate change. At the same time, cooperation between the two regions, which is carried out both at the level of EU-ASEAN relations and on a bilateral basis between states, is not without difficulties, which has led to a decrease in confidence in the EU as a reliable partner. According to the authors, the potential of both economic and strategic cooperation is far from being fully developed.

**Keywords:** EU, Southeast Asian countries, strategic security, economic cooperation, Indo-Pacific region.

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**ГОСУДАРСТВА ЮВА И СТРАНЫ ЕС:  
ПАРАМЕТРЫ ВЗАИМОДЕЙСТВИЯ**

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**Аннотация.** В статье представлены результаты анализа взаимоотношения между государствами Юго-Восточной Азии и странами ЕС. Совпадение экономических и стратегических интересов и сходство позиций в отношении поддержания миропорядка обеспечивают основу для долгосрочного сотрудничества. В то же время такие факторы, как различия в подходах к разрешению региональных конфликтов, торговые разногласия и климатическая политика ЕС, ограничивают потенциал взаимодействия двух групп государств.

**Ключевые слова:** ЕС, страны Юго-Восточной Азии, стратегическая безопасность, экономическое сотрудничество, ИТР.

## INTRODUCTION

Southeast Asian (SEA) countries are a subject of competition for influence between the United States and China. In an attempt to avoid choosing between these two powers, the countries of the region seek to balance between them by pursuing a policy of hedging, which involves cooperation with third countries, primarily dialogue partners, as an important element<sup>1</sup>. These include the countries of the European Union (EU). Until recently, they have consistently enjoyed the trust of SEA as a preferred “third party.”

There are only a few publications on the problems of SEA-EU relations in Russian academic literature. These are mainly short articles [1, 2, 3, 4, 5, 6, 7]. Meanwhile, relations between the two regions have been maintained for over 45 years and are developing in various areas, reflecting mutual interest in their expansion.

The problem, however, is that this interest does not always translate into concrete action. To understand the reasons for this situation, it is important not only to trace the general track of interaction between the states of the two regions in the economic and strategic spheres but also to determine whether European countries will be able to provide SEA states with “insurance” against the risks arising from the growing US-China rivalry and changes in the global geopolitical situation, and reliably ensure the security and stable economic development of their Asian partners. Solving this problem will also make it possible to answer the question of how fully the potential of this cooperation has been realised [8].

## RELATIONS BETWEEN THE EU AND ASEAN

The European Union became ASEAN’s first dialogue partner. In 2022, at the EU-ASEAN summit, the first in the history of their relations,

<sup>1</sup> ASEAN’s dialogue partners are countries that cooperate with the Association of Southeast Asian Nations (ASEAN) in the areas of economics, politics, security, culture, and education. They are not members of ASEAN, but interact with this organisation through various cooperation mechanisms. There are nine full-fledged dialogue ASEAN partners: Russia, Australia, India, Canada, China, New Zealand, the Republic of Korea, the United States, Japan, and the EU.

the 45th anniversary of their diplomatic partnership was marked with solemnity<sup>2</sup>. It was institutionally and legislatively formalised by the signing of the 1980 Agreement on Cooperation between ASEAN and the EEC, which laid the foundation for the further development of interregional ties, realised through joint action plans, the latest of which covers the period from 2023 to 2027. In 2020, the relations between the two regional organisations were upgraded to a strategic partnership, signalling their intention to intensify cooperation, both in the economic sphere, where great progress had been made in previous decades, and in the political and security spheres. The EU allocated €180 million for regional cooperation with ASEAN for the period 2021–2027 to support their strategic partnership in key areas [source 1].

However, the 1980 Agreement was concluded later than similar agreements between ASEAN and China, Japan, South Korea, India, Australia, the United States, New Zealand, and Russia. This is due to certain difficulties in organizing interaction between the countries of Southeast Asia and the EEC, whose members adhered to different priorities and value orientations in their cooperation.

Nevertheless, differences in the parties’ positions on a number of issues relating to human rights, environmental protection, and attitudes towards regional and global conflicts do not significantly hinder the expansion of diplomatic contacts between the EU and ASEAN, which are realised through various formats: the ASEAN Regional Forum, meetings of senior officials from both blocs, EU-ASEAN Ministerial Meetings (AEMM), ASEAN–EU Post-Ministerial Conferences, and the EU-ASEAN Business Council [6]. Since 2015, the EU has had a diplomatic mission in Jakarta, headed by the official ambassador of the European Union to ASEAN.

Interregional cooperation covers various areas, such as trade, investment, sustainable development, support for ASEAN regional integration (APRIS Programme), energy security and

<sup>2</sup> In 1977, at the tenth meeting of ASEAN foreign ministers, a decision was made to intensify formal relations with the European Economic Community (EEC). In 1977, a Special Coordinating Committee was established to conduct regular dialogue with the EU. Later, it was renamed the ASEAN Brussels Committee (ABC), which includes ASEAN ambassadors accredited to the EU.

the “green transition,” environmental protection, combating climate change and adapting to its consequences, cybersecurity, counter-terrorism, cultural exchange, etc. All these areas of cooperation are of mutual interest and are therefore being actively developed. The “EU-ASEAN Strategic Partnership” document mentions four main areas of cooperation: economy, security, sustainable communication, and sustainable development [source 2].

The EU’s position on ASEAN and its members is primarily determined by economic considerations. SEA, with its 10 ASEAN member countries, is primarily viewed as a source of economic growth and a target market for European countries seeking to avoid excessive dependence on China. However, the recognition of SEA’s economic importance has led to an understanding of its strategic value as an important player in the Indo-Pacific region. The EU believes that it is impossible to use ASEAN’s economic potential to ensure its own growth without regard for the security risks that could disrupt the progressive development of the countries in the region.

The rapprochement between SEA countries and the EU is driven by the search for reliable partners, both economic and political, amid intensifying strategic competition between the USA and China. The EU is seen as a neutral force, a kind of buffer between the conflicting players [9], as evidenced by a public opinion poll that formed the basis of the study, *The State of Southeast Asia in 2023*, conducted by the Singapore Institute of Southeast Asian Studies (ISEAS).

The European Union’s image in SEA improved compared to the previous year, including a better reputation as a force advocating free trade. When asked, “Which country would you choose as the leader in maintaining world order?” 23% of respondents named the EU (up from 16.6% in 2022), placing it second after the USA. The share of those who positively assessed the European Union in terms of its political and strategic influence on ASEAN countries also increased, from 0.8% to 4.9%, a figure higher than that for South Korea, India, and the United Kingdom. The EU ranked third, after the USA and China, in terms of trust in its policy of supporting free trade [source 3, p. 27, 29, 31]

However, data from the subsequent *ISEAS* study, *The State of Southeast Asia in 2024*, shows a decline in the EU’s image across several indicators. In particular, trust in the EU as a leader in upholding international law and a rules-based world order fell to 16.9%, down from 23% the previous year. A similar decline was seen in its role in promoting free trade, with support dropping from 17.8% to 13.9%. Fewer respondents now consider it a force influencing countries in the region, 3.4% compared to 4.9% [source 4, pp. 35, 37, 40-42]. When asked whether the political culture and worldview of their country were incompatible with that of the EU, 9.2% of respondents answered affirmatively in 2023, rising to 16.5% in 2024.

The decline in the EU’s rating in the sociological survey can likely be explained by the unrealised expectations of countries in the region regarding the European Union. The growth in trust in the EU recorded in the 2023 survey was most likely linked to hopes for increased cooperation between the EU and ASEAN, following the first summit of the two regional blocs held in 2022. However, over time, no clear positive shifts in their relations have taken place. In addition, public opinion was influenced by differences between the positions of the EU and ASEAN on the situations in Ukraine and the Palestinian-Israeli conflict.

The latter circumstance had a negative impact on the level of trust in the EU in the Muslim countries of SEA, Indonesia and Malaysia. Anti-Western sentiments intensified there, compounded by the negative reaction of the population to the EU’s decision to ban imports of palm oil, produced mainly by these two countries, on environmental grounds. The succeeding president of Indonesia (from October 2024), Prabowo Subianto, stated during his election campaign that the country no longer really needed Europe, criticising the bloc’s ban on certain Indonesian imports and suggesting that national exporters cooperate more closely with other Asian countries [10].

According to a sociological survey, in 2023, almost 48% of Indonesians said they did not believe, or had little faith, that the EU would “do the right thing” and contribute to global peace, security, prosperity, and governance (in 2022, this figure was 30%). A similar opinion was held by 31% of Malaysians in 2023 [11]. The West is perceived in

both Indonesia and Malaysia as an anti-Muslim actor in international relations, imposing its values [source 5].

The EU's position on a number of other issues has provoked negative reactions or condemnation from SEA countries. These include the EU's policy on human rights<sup>3</sup>, disagreements between the regional blocs on resolving conflicts in Myanmar and East Timor, and the EU's attempts to impose conditions on trade and cooperation, particularly some new EU regulations aimed at combating deforestation, the use of forced labour, etc. All of this undermines ASEAN countries' trust in the European Union, which, in turn, does not pay as much attention to the SEA region as the USA, China, Japan, and India. As stated by Charles Michel, President of the European Council, at the EU-ASEAN summit held in Brussels in 2022, "the reality of region-to-region ties is not quite a robust relationship that reflects shared trust" [8].

In addition, attempts by both structures to expand interregional cooperation and strengthen the partnership between the EU and ASEAN are diminished by the priority given to bilateral cooperation between European and SEA countries, often to the detriment of interregional dialogue.

The EU's presence in the region is primarily driven by economic interests and lacks the strong geopolitical implications that characterise the behaviour of other major ASEAN dialogue partners, such as China, Japan, and the United States. For its part, although ASEAN recognises the importance of the EU as one of its main trading and investment partners, it does not yet have a common strategy or coordinated policy towards the European Union [12].

Although economic ties between the two blocs are steadily developing and diplomatic contacts

<sup>3</sup> In February 2022, the European Parliament voted to call on the Philippine government to "respect its human rights obligations" and to initiate legal proceedings that could result in a loss of zero-tariff benefits on approximately 6,200 items, ranging from fruit to textiles and car parts. In particular, referring to "serious and systematic human rights concerns" in Cambodia, the EU imposed duties on imports of clothing, footwear, and tourist goods from that country in August 2020, whereas these items accounted for approximately 20% of the country's exports to the 27 EU countries [9].

are strengthening, relations between the regional institutions remain at a standstill.

## STRATEGIC INTERACTION

Back in 2015, a joint statement by the European Union countries entitled "*The EU and ASEAN: A Partnership with Strategic Purpose*" referred to the EU's interest in strengthening relations with ASEAN, as the latter had contributed to a "more secure regional security order in the wider Asia-Pacific region" [13].

The signing of the Strategic Partnership Agreement between the EU and ASEAN reflected the interest of both regional institutions in expanding security relations to address common challenges faced by the two regions. This predetermined the prioritisation of cooperation in areas related to both traditional and non-traditional security threats. From the EU's perspective, deepening relations with ASEAN in this area is largely driven by its ambition to strengthen its presence in the Indo-Pacific region as an autonomous external player, amid the ongoing competition between the USA and China.

Despite changes in the overall geopolitical landscape due to the conflicts in Ukraine and the Middle East, the Indo-Pacific region remains a key focus of the EU's foreign policy strategy, particularly as it encompasses critical trade routes requiring maritime security. About 40% of the EU's external trade passes through the South China Sea alone [14]. Therefore, ensuring peace and stability in the region is a European priority.

As noted by Josep Borrell, former High Representative of the Union for Foreign Affairs and Security Policy, in an interview with the Indonesian newspaper *Jakarta Post*, "maritime security is a cornerstone of our efforts actively involving the naval forces and coast guards of EU member states. We are committed to further strengthening cooperation in this area and are determined to expand concrete cooperation with our ASEAN partners" [source 6]. Cooperation with ASEAN is treated as one of the central elements of the EU's new Indo-Pacific strategy. ASEAN is mentioned 31 times in the text of this document, approximately twice as often as any other partner organisation or country [source 7].

The EU's position on the formation of an open, inclusive, effective, multilateral, and rules-based regional order, as set out in the *EU Strategy for the Indo-Pacific Region*, has been welcomed by members of the Association of Southeast Asian Nations, who expressed a similar approach in the *ASEAN Outlook on the Indo-Pacific*, adopted in 2020. The EU also attaches paramount importance to addressing issues related to economic intercoordination in the Indo-Pacific region, which in turn dictates the need to ensure political stability. The latter implies two main conditions: non-participation in minilateral coalitions such as the *Quadrilateral Security Dialogue (QUAD)* between the USA, Australia, India, and Japan, and the *Trilateral AUKUS Defence Pact*, which are confrontational towards China; and the recognition of ASEAN's central role in ensuring regional security.

For SEA countries, security cooperation with the EU provides an alternative path to development without the need to support the anti-China rhetoric evident in the US Indo-Pacific strategy. According to Sharon Seah from the Singapore-based *ASEAN Studies Centre*, the bloc "is interested in working with like-minded partners such as the EU towards the practical realisation of its strategic document *ASEAN Outlook on the Indo-Pacific*, including in the area of improving communications and maritime cooperation" [15].

Since 2013, the EU has held several sessions of the EU–ASEAN High-Level Dialogue on Maritime Security Cooperation<sup>4</sup>, and currently co-chairs, together with Vietnam and Australia, the Inter-Sessional Meeting of the ASEAN Regional Forum on Maritime Security. It is clear that the EU is seeking to expand its security activities in Asia. According to political scientist R. Heydarian, "the EU is persistently, but quietly, building a new golden age with ASEAN based on common strategic interests and prospects" [16].

These common strategic interests, in the context of the growing US-China rivalry in the Indo-

<sup>4</sup> The EU-ASEAN High Level Dialogue on Maritime Security is a form of cooperation and coordination between these two regional organisations, aimed at strengthening security in the maritime environment. The purpose of this dialogue is to discuss and resolve issues related to maritime safety, combating piracy, protecting marine resources, and other issues relating to maritime security in the region.

Pacific region and the ongoing territorial conflict between China and several SEA countries in the South China Sea, include cooperation between the two regions in the sphere of defence, which is mainly implemented through bilateral relations that intensified in 2022–2023.

The desire for a broader presence in the Indo-Pacific region is demonstrated above all by France, which was the first EU member to join the Treaty of Amity and Cooperation in Southeast Asia in 2007 and became an ASEAN development partner in 2020. France is an observer at regular ASEAN+ defence ministerial meetings and actively participates in the working group on maritime security and peacekeeping operations [17]. As the only EU country with a permanent military presence in the Indian Ocean, France has stepped up high-level diplomatic contacts with the Philippines, Cambodia, and Thailand with a view to expanding security and defence cooperation. A defence agreement was signed with the Philippines back in 2016, providing for the training of military personnel, the development of ties in the supply of military equipment, and cooperation in the defence industry. The conclusion of the French–Philippine Visiting Forces Agreement (*VFA*) is currently underway; it would allow the armed forces of the two countries to conduct joint operations on each other's territories.

The development of defence relations, alongside the strengthening of economic cooperation, was discussed during Cambodian Prime Minister Hun Manet's visit to France in January 2024. In March 2024, Thai Prime Minister Srettha Thavasin held a meeting with President Macron, which was important not only for advancing negotiations on a free trade agreement (FTA) but also for attracting French investment and technology to establish a military equipment production and service centre for Southeast Asia in Thailand. France also demonstrates "strong strategic proximity" [18] to Indonesia, which is interested in diversifying its military equipment supplies. Indonesia and France have had a strategic partnership since 2011, and in 2021, the *Action Plan for Deepening Strategic Cooperation for the Period 2022–2027* was signed.

Relations between France and Singapore, which were elevated to the level of a strategic partnership back in 2012, provide for an annual dia-

logue on defence policy between the two countries and joint military exercises. France has also provided the Singapore Air Force with a training facility at the Cazaux Air Base [19].

France and Vietnam have improved their security relations in recent years, signing a defence cooperation agreement as early as 2009 and launching a defence policy dialogue in 2016. The Vietnam–France Joint Committee on Defence Cooperation is currently in operation, defining bilateral defence initiatives until 2028. French ships have participated in exercises to ensure freedom of navigation in the South China Sea.

Among the SEA countries' strategic partners, Germany should also be highlighted. Following the adoption of its Indo-Pacific Strategy in 2020, Germany has sought to establish closer relations with states in the region, driven by its intention to diversify trade relations in Asia and reduce dependence on China [source 8]. In 2020, Germany became a party to the Treaty of Amity and Cooperation in SEA and published its *Key Policy Directions for the Indo-Pacific Region*, which emphasise the importance of strengthening partnerships with ASEAN to develop trade and investment ties, combat climate change, and protect the liberal international order [20]. In March 2024, Germany held Southeast Asia Week, welcoming the prime ministers of Malaysia, the Philippines, and Thailand to Berlin. Then-Chancellor Olaf Scholz confirmed the need to strengthen economic, political, and security cooperation with SEA states [21]. German ships visit ports and participate in military exercises in the region.

For ASEAN countries, cooperation with the EU in the sphere of security opens up the possibility of diversifying their foreign policy in the context of the ongoing confrontation between China and the USA. In addition, they see the EU as an alternative source of arms supplies and funding to strengthen their coast guards. At the same time, despite the increased military presence of EU countries in the Indo-Pacific region, they are still not regarded by SEA states as major military powers capable of competing with the USA and China, and thus of strengthening regional security. The European Union does not participate in the East Asia Forum or the ASEAN Defence Ministers' Meeting Plus (*ADMM+*), as ASEAN

opposes expanding these formats beyond the Asia-Pacific region. SEA countries prefer bilateral security relations with individual EU states, which they view as more aligned with their national interests.

The political significance of EU countries for SEA is determined primarily by their participation in addressing non-traditional security threats, including combating transnational crime and terrorism, ensuring cybersecurity, and supporting adaptation to natural disasters and climate change. These issues are outlined in the *Plan of Action to Implement the ASEAN–EU Strategic Partnership (2023–2027)* and are of mutual interest for inter-regional cooperation.

One of the most important areas of cooperation in the field of political security is the fight against terrorism, which is transnational in nature. However, unlike the USA, which has played a major role in establishing counter-terrorism systems in SEA countries, the EU's activities are mainly limited to holding dialogues aimed at strengthening law enforcement agencies, the justice system, and intelligence services. These efforts are carried out through institutions such as the ASEAN Regional Forum (*ARF*), *ASEAN-EU Ministerial Meetings*, the Asia-Europe Meeting (*ASEM*) Forum, the Jakarta Centre for Law Enforcement Cooperation (*JLEC*), the Southeast Asia Regional Centre for Counter-Terrorism (*SEARCCT*) in Kuala Lumpur, the International Law Enforcement Academy in Bangkok (*ILEA*) and the "Our Eyes" Initiative.

Cooperation in the fight against terrorism covers several areas: law enforcement, border protection, terrorist financing, arms smuggling, money laundering, and cybersecurity. However, as experts note, counter-terrorism cooperation between Europe and SEA has not gone beyond master classes and joint seminars on terrorism-related issues [22]. An important component of counter-terrorism activities, cooperation in the field of intelligence, is not mentioned in any action plan or other ASEAN–EU strategic documents [23]. To date, only Indonesia and the Philippines have implemented joint projects with the European Union to combat the financing of terrorist activities. Thus, despite its relevance to both regions, cooperation in the sphere of counter-terrorism has not been adequately developed between the EU and ASEAN.

In the context of the globalisation of climate policy and the EU's recognition of its leading role in combating climate change, cooperation in this area spans various domains: responding to natural disasters, assisting SEA countries in reducing greenhouse gas emissions, and supporting the transition to green energy. The EU, as the largest provider of development aid to SEA countries, has allocated significant funds to various environmental programmes, including €5 million for the "Smart Green ASEAN Cities Initiative" and an additional €5 million to prevent tropical deforestation. In 2020, the EU launched a €10 million programme to support the ASEAN Coordinating Centre for Humanitarian Assistance on Disaster Management. A total of €5 million was allocated for forest management (2020–2023), €20 million for combating smog (2016–2023), and €10 million for biodiversity conservation (2017–2022) [12].

The EU also cooperates with individual ASEAN member states, particularly Thailand, Singapore, and Indonesia, on initiatives to develop a bio-circular and green economy. Cambodia, Laos, the Philippines, and Vietnam receive assistance in the development of agriculture, hydro-electric engineering, and a closed-loop economy, and their energy transition is being actively supported. The latter is becoming a key element of cooperation between the two regions in the area of climate impact regulation.

SEA countries need international technological and financial assistance to meet their greenhouse gas emission reduction commitments, while European countries view cooperation in the field of green energy as an opportunity to access a promising regional market. Virtually all major EU countries are involved, in one way or another, in SEA projects or plans related to renewable energy sources.

At the same time, EU cooperation with ASEAN countries on climate change faces a number of limitations linked to EU environmental regulations, which it actively promotes at the global level, often causing discontent among developing countries.

The *European Green Deal* includes several provisions that give it an international character. For instance, EU Deforestation Regulation (*EUDR*)

prohibits the import into the EU of food and raw materials associated with deforestation and forest degradation. Palm oil, an important export commodity for several SEA countries, primarily Indonesia and Malaysia (which together account for approximately 85% of palm oil imported into Europe [source 9]), falls under the scope of this law.

The main reason for the restriction on palm oil in Europe is concern for the preservation of tropical forests, which have been heavily deforested to make way for oil palm plantations. However, palm oil exporters argue that they have taken several steps to address the issue, including reforestation programmes, nature conservation efforts, and stricter certification for industries producing environmentally friendly palm oil.

Indonesia and Malaysia view the EU's actions as discriminatory, citing the absence of clear guidelines on sustainable palm oil production [24]. This issue could ultimately delay ongoing and future discussions on a free trade agreement with both countries. "The Deforestation-Free Products Regulation is a deliberate act by Europe to block market access," said Fadillah Yusof, Deputy Prime Minister and Minister of Plantation and Commodities [source 10].

Indonesia and Malaysia have filed a complaint against the EU with the World Trade Organization over the introduction of unilateral protectionist measures that could negatively affect their economies. As of December 2024, the EU's rules impose a ban on imports of many goods, including palm oil, timber, and rubber, unless companies can prove that their activities do not contribute to deforestation. Several SEA governments consider this requirement too burdensome for small businesses in their countries. In response, Indonesia and Malaysia have refused to accept the EU's climate policy measures and have suspended discussions on various other issues, including trade under the EU–ASEAN Strategic Partnership.

The second document adopted by the EU<sup>5</sup> that has raised concern among SEA countries is the Carbon Border Adjustment Mechanism

<sup>5</sup> The Carbon Border Adjustment Mechanism (*CBAM*) is a tool used by the European Union to establish a fair price for carbon emitted in the production of carbon-intensive goods supplied to the EU, and to encourage cleaner industrial production in countries outside the EU.

(*CBAM*). It introduces duties on products imported from countries that either do not have a carbon pricing mechanism or have carbon prices below the level set by the EU's Emissions Trading Scheme. These regulations are intended to tighten sustainability standards for partner countries and companies exporting goods to Europe. It is therefore not surprising that ASEAN perceives the EU as a proponent of protectionism and views its environmental policy as harmful to the economies of SEA countries, especially since the *Green Deal* does not include a spending plan to help external partners adapt to the new EU rules and standards [25]. In SEA, the EU's environmental standards are often described as "regulatory imperialism," "climate colonialism," and "protectionism disguised as climate action" [25].

The EU's environmental activism has led to a decline in trust among ASEAN countries. According to a public opinion poll, almost one-third of Indonesians and one-fifth of Malaysians do not trust the EU, believing that its stance on the environment and climate change could jeopardise their countries' interests [source 10]. Indonesia has an additional reason for dissatisfaction with the EU's environmental policies: the EU is placing excessive pressure on the country's leadership to adopt more decisive decarbonisation measures, without due regard for the associated socio-economic and political risks [26]. Indonesian authorities have even indicated their readiness to withdraw from the Paris Agreement on Climate Change.

SEA countries are generally resistant to external interference in domestic policies that could hinder economic growth or exacerbate social challenges. Therefore, despite the importance and necessity of cooperation between the two regions in addressing climate change, the future of such collaboration will largely depend on the extent to which the EU takes into account the risks faced by SEA countries in fulfilling their climate commitments. It will also depend on whether the EU refrains from imposing strict conditions on goods supplied to its market, promotes cleaner industrial production in non-EU countries, and balances environmental regulations with economic realities. SEA countries are counting on financial and technological assistance from the EU in their efforts to combat climate change. EU support should be channelled into specific

projects related to the transition to a green economy, including energy, circular economy development, green transport, and smart cities [27]. Given Donald Trump's decision to withdraw the United States from the Paris Agreement and to suspend participation in the Just Energy Transition Partnership, EU countries now bear greater responsibility to provide environmental support for SEA countries' "green transition" measures.

However, the potential for climate cooperation between ASEAN and the EU remains far from fully realised. The core challenge lies in the fact that SEA countries' approach to environmental issues is largely shaped by economic priorities. When forced to choose between economic and environmental interests, they tend to prioritise the former, an approach that continues to shape interregional relations.

## ECONOMIC RELATIONS

Economic relations between the two regions have a well-developed and continually improving legal framework. The first contacts between the parties aimed at establishing this framework date back to 1977. Initially, both sides hoped to conclude a single interregional trade and investment agreement between ASEAN and the EU. Negotiations began in 2007 but were suspended by mutual agreement in 2009 due to the diverging interests of the negotiating parties. It became clear that the interests of individual SEA countries were so contrasting that reconciling them, even with the comparatively unified position of the EU, within a single negotiation process and in a relatively short timeframe, would be virtually impossible.

The parties then shifted to a bilateral format of negotiations between the EU and the largest SEA countries. At the same time, both sides agreed that bilateral trade and investment agreements (primarily FTAs) could serve as "building blocks" for a future single interregional agreement on trade and investment cooperation. So far, this remains a long-term goal. Negotiations with Singapore and Malaysia began in 2010, with Vietnam in June 2012, with Thailand in March 2013, with the Philippines in December 2015, and with Indonesia in July 2016.

By early 2025, negotiations on bilateral agreements with Singapore (concluded in 2014) and Vietnam (in 2015) had been completed. Negotiations with Indonesia and Thailand are ongoing, while those with Malaysia and the Philippines have been suspended for technical reasons. Contacts with Myanmar have been interrupted due to the deterioration of the EU's political relations with that country.

At the regional level, the European Commission and ASEAN member states conducted an analysis to assess the prospects for resuming inter-regional negotiations and concluded that their positions remained too far apart. In September 2022, following several consultations between ASEAN and EU economy ministers, a decision was made to refocus the Joint EU–ASEAN Working Group on the development of a framework programme defining the parameters of a future Free Trade Area (FTA) between ASEAN and the EU. The Joint Working Group plans to concentrate on sectoral cooperation in areas such as the digital economy, green technologies and services, and the sustainability of supply chains through 2028. Adopted in 2022, the *ASEAN–EU Action Plan for 2023–2027* is currently the main comprehensive document guiding medium-term EU–ASEAN cooperation.

**Trade relations.** Trade undoubtedly dominates economic relations between SEA countries and EU member states. The former represents the EU's third-largest trading partner outside Europe in terms of trade value (after China and the USA). In 2023, SEA exports to the 27 EU countries amounted to \$172 billion<sup>6</sup>, while imports reached \$102 billion. Mutual trade turnover amounted to \$274 billion, with a positive trade balance of \$70 billion in favour of SEA countries [source 11, p. 32]. The volume of mutual trade in services in 2022 (the latest published data) exceeded \$137 billion [source 12].

When assessing mutual trade between SEA countries and EU states, one can observe a noticeable similarity, partly formal, in the range of goods exchanged, as well as a fairly high degree of stability. In 2023, SEA states exported primarily

<sup>6</sup> Hereinafter, all data are presented in US dollars for ease of comparison (converted at the average annual Euro/USD exchange rate).

technology-related items to EU countries (50.8% of total exports): electrical machinery and equipment, sound recording and reproduction equipment; television image and sound recording and reproducers (28.7%); various other equipment and mechanical devices (16.7%); footwear and clothing (7.5%); optical, photographic, cinematographic, measuring, checking, precision, medical and surgical instruments and apparatus (4.4%), as well as agricultural products, handicrafts, etc.

In the same year, imports from EU countries to SEA states were similarly dominated (63.7% of total imports) by: electrical machinery and equipment, sound recorders and reproducers; television image and sound recorders and reproducers (21.9%); miscellaneous equipment and mechanical appliances (20.4%); pharmaceutical products (8.8%); optical, photographic, cinematographic, measuring, checking, precision, medical and surgical instruments and apparatus (6.4%); cars (6.2%), as well as luxury goods and certain food products<sup>7</sup>.

As evidenced by trade statistics between SEA countries and their main partners over a representative ten-year period (see Table 1), EU countries have consistently ranked third, after China and the United States, when mutual trade within ASEAN is excluded. In reality, the EU's share in SEA trade is even higher, as a traditionally significant volume of goods from EU countries is re-exported by Singapore. Singapore also serves as a re-export centre for some goods supplied to other SEA countries by fellow ASEAN members; in Singapore's customs statistics, these are recorded as Singaporean exports.

The analysis of trade operations between SEA countries and EU states showed (see Table 2) that in 2023, their volume increased by almost 28% compared to 2013, and the positive balance for SEA countries increased almost 32 times.

This fact clearly demonstrates the undeniable benefits of trade relations with EU member states for SEA countries. The same can be said of their investment relations.

**Investment cooperation.** EU countries are among the top five foreign investors in the econ-

<sup>7</sup> Calculations relying on the ASEAN database (<https://data.aseanstats.org>).

**Table 1.** Share of leading partners in SEA trade, 2013 and 2022

	2013		2022	
	Million dollars	%	Million dollars	%
Total	2 533 069	100.0	3 846 182	100.0
SEA countries <sup>1</sup>	617 752	24.4	856 465	22.3
PRC	351 583	13.9	722 103	18.8
United States	205 313	8.1	420 445	10.9
EU-27	214 703	8.5	295 162	7.7
Japan	240 431	9.5	268 586	7.0

<sup>1</sup> Intra-regional trade operations within ASEAN.

Tables 1, 2, 3, and 5 are calculated based on: [source 13].

**Table 2.** Trade between SEA countries and EU-27 states in 2013–2023, million dollars

	Exports to the EU-27	Imports from the EU-27	Mutual trade turnover	Balance for SEA countries
2013	108 437	106 266	214 703	2171
2014	115 846	102 413	218 260	13 433
2015	110 472	91 032	201 504	19 440
2016	113 482	91 889	205 372	21 593
2017	138 485	91 884	230 370	46 601
2018	141 190	111 000	252 190	30 190
2019	134 512	110 562	245 074	23 950
2020	130 298	96 485	226 783	33 813
2021	152 891	116 565	269 456	36 325
2022	176 378	118 784	295 162	57 594
2023	171 900	102 800	274 700	69 100
2013–2023	1 493 891	1 139 680	2 633 571	354 211

omies of SEA countries. An analysis of aggregate data on foreign direct investment (FDI) inflows from outside SEA between 2013 and 2022 shows that EU countries consistently ranked third among foreign investors, after the United States and Japan, followed at a considerable distance by China (see Table 3). In 2023, FDI inflows from EU states to SEA countries reached \$25.4 billion, placing the European Union second in the ranking of foreign investors [source 14, p. 55].

As of early 2023 (latest official data), accumulated FDI from EU member states to SEA countries exceeded \$361.3 billion (see Table 4), representing an increase of more than 11% over five years. In 2023 alone, the EU's total direct investments in SEA countries reached \$435.3 billion [source 12],

**Table 3.** Foreign direct investments in SEA countries, 2013–2022 rr.

	\$ million	%
Total	1 721 409	100.00
Including:		
ASEAN member states	235 143	13.66
United States	209 176	12.15
Japan	197 971	11.50
EU countries	166 190	9.65
PRC	106 184	6.17
Republic of Korea	70 549	4.10
United Kingdom	40 366	2.34
Canada	23 154	1.35
India	12 458	0.72
Australia	12 387	0.72
Russia	1 002	0.06
New Zealand	842	0.05
Other countries	645 987	37.53

clearly demonstrating the region's strong appeal to investors from EU states<sup>8</sup>.

Cumulative FDI from EU countries as of early 2023 is distributed extremely unevenly across SEA countries: Singapore accounts for 74.3%, while three other SEA countries, Thailand, Indonesia, and Malaysia, collectively account for 24.9%. Only 0.8% of EU investments are concentrated in Myanmar, Cambodia, and Brunei.

This distribution is primarily explained by the sectoral structure of EU FDI in SEA countries (see Table 5).

A total of 64% of EU FDI is directed toward various services, mainly in Singapore and, to a lesser extent, in the more developed economies of Indonesia, Malaysia, and Thailand, while 26% of EU FDI is invested in the manufacturing industry in those same countries.

<sup>8</sup> It should be borne in mind that owing to differences in FDI accounting systems between statistical agencies of SEA and EU countries, the data on their value may not match. In particular, the authors found discrepancies in this type of data up to 2021. According to statistics published by SEA countries, the volume of accumulated FDI from EU countries amounted to \$337 billion, while EU statistical agencies recorded a higher figure of \$395 billion [source 15, p. 34].

**Table 4.** Cumulative direct investments of EU countries in SEA countries, 2018–2022<sup>1</sup>

SEA countries	2018	2019	2020	2021	2022	
					Million dollars	%
Total SEA countries	324 681	292 104	287 780	337 389	361 326	100.0
Including:						
Singapore	229 376	190 761	195 116	240 989	268 570	74.3
Thailand	26 757	27 423	27 367	29 663	33 749	9.3
Indonesia	42 691	42 691	37 262	33 916	28 635	7.9
Malaysia	23 141	28 394	25 257	27 678	27 829	7.7
Myanmar	947	962	1 050	1 112	969	0.3
Cambodia	729	779	827	911	913	0.3
Brunei	1 039	1 094	901	3 121	662	0.2

<sup>1</sup> As of the end of the relevant year. Data for the Philippines, Laos, and Vietnam could not be found (either the ASEAN statistical service did not keep records of accumulated direct investment by EU countries to SEA countries until 2018, or its results were not published).

Calculations based on: <https://data.aseanstats.org/fdi-by-hosts-and-sources-stock-outward>

**Таблица 5.** Отраслевая структура прямых инвестиций стран ЕС-27 в государствах ЮВА, 2013–2022 гг.

Sectors	Foreign direct investments	
	Million dollars	%
Total	166 190	100
Including:		
Services	106 249	64.0
Of which:		
retail and wholesale trade	47 205	28.4
scientific and technical services	20 375	12.3
financial and insurance services	18 083	10.9
information and communication services	12 479	7.5
real estate transactions	4 512	2.7
other services	3 595	2.2
Manufacturing	43 250	26.0
Mining industry	4 617	2.7
Transport and warehousing	2 749	1.7
Electricity and gas supply	2 736	1.6
Other industries	6 589	4.0

Interaction between SEA countries and EU member states in the investment sphere is characterised by a phenomenon not often observed in relations between developed and developing coun-

tries: three SEA countries, Singapore, Thailand, and Malaysia, are active investors in the EU. Their cumulative FDI in EU countries amounted to \$ 181.2 billion in 2022.

However, it should be noted that, first, this figure does not include data on Indonesia, which could not be found, although it is well established that Indonesian investors are actively operating in the European market. Second, the volume of accumulated FDI from SEA countries to EU states has grown rapidly over the last decade. Singapore's accumulated investments in EU member states rose from \$ 27.3 billion in 2013 to \$ 146.3 billion in 2022, an increase of 5.3 times<sup>9</sup>. Thailand's FDI in EU countries grew from \$ 3.4 billion in 2013 to \$ 23.7 billion in 2022 (a sevenfold increase) [source 17]. Malaysia's accumulated investments in EU countries increased from \$ 7 billion in 2014 to \$ 11.2 billion in 2022 (a 1.6-fold increase) [source 18].

**Financial assistance.** The third area of economic cooperation between SEA and EU countries is financial aid. The volumes are relatively small, less than \$ 18.4 billion for the entire region<sup>10</sup> over the 2013–2023 period, since most EU subsidies

<sup>9</sup> Calculated at the official exchange rate at the end of the relevant year [source 16]. Last updated on 19 March 2024.

<sup>10</sup> Calculations relying on the database [source 19].

are directed toward developing countries in Africa. In the SEA region, 62% of financial assistance was provided in the form of concessional loans (Official Development Assistance, or *ODA*). The main recipients of this type of aid were the most populous (Indonesia, Vietnam, the Philippines) and the poorest (Cambodia and Laos) countries in the region. A total of 18% of financial aid came in the form of grants, with a similar distribution across SEA countries.

When assessing overall economic cooperation between SEA countries and EU member states in recent years, it should first be emphasised that, on the whole, it has been beneficial for SEA. This is evidenced by such indicators as: first, the growth in mutual trade volumes, accompanied by a continually increasing positive balance for SEA countries; and second, the shared interest in investment operations. As the analysis has shown, Singapore plays a special role in economic cooperation between SEA countries and EU member states, not only as the region's most economically powerful partner, but also as a traditional re-export hub that facilitates trade and investment operations on both sides.

This combination of factors significantly influences the nature of political relations between countries in the region and EU member states.

## CONCLUSION

Despite the geographical distance between Europe and SEA, the two regions are closely interconnected through global trade. This interdependence has laid the foundation for long-term cooperation, developed both at the institutional level, between the EU and ASEAN, and through bilateral relations. Economic interaction, which has long dominated relations between the regions and has been mutually beneficial, has since 2020 been complemented by a strategic component: ASEAN and the EU have become strategic partners.

The emergence of this strategic dimension can be attributed to the EU's recognition of the importance of the Indo-Pacific region, of which SEA countries are a key part, as well as to SEA's interest in engaging a "third party" amid the growing rivalry between the USA and China for regional dominance. The EU has traditionally been seen by

SEA countries as a reliable partner in shaping an inclusive world order.

At the same time, the potential for interregional cooperation remains far from fully realised, and interaction has not been without its challenges. In 2024, SEA's confidence in the EU as a reliable partner declined, undermining the EU's previously positive image in regional public opinion. This shift in attitude can largely be explained by divergent positions on the conflicts in Ukraine and between Israel and Palestine. Unfulfilled expectations regarding the deepening of the strategic partnership also played a role, as such a partnership could have offered SEA countries a degree of manoeuvring space in an increasingly complex geopolitical landscape shaped by intensifying US–China competition. Strategic interaction between the regions has progressed slowly, and the intentions expressed by both sides have not yet been translated into concrete action, partly due to the EU's increased focus on internal issues and the war in Ukraine. As a result, preference has been given to bilateral contacts, with France and Germany showing the most initiative in strengthening cooperation, particularly in the area of maritime security.

Cooperation between the regions in countering non-traditional security threats is also not without its difficulties, which have been particularly evident in the fight against climate change. These difficulties stem from the European Union's adoption of regulations that do not sufficiently take into account the interests and capabilities of developing SEA countries. As a result, the EU has suffered a reputational loss and is no longer widely perceived in the region as a proponent of the global free trade agenda [28]. At the same time, mutual interest in the development of green energy has grown, becoming one of the priority areas for attracting European investment. Given the US withdrawal from the Paris Agreement and the Just Energy Transition Partnership, new opportunities are opening for European countries to support SEA nations in their "green transition", a development that could help strengthen partnership relations between the two regions.

Economic cooperation remains the main area of interaction between SEA countries and the EU, based primarily on bilateral contacts. It is active-

ly developing in both trade and investment and is characterised by its mutually beneficial nature, something relatively rare in relations between developed and developing countries. There is every reason to believe that economic cooperation, despite ongoing differences between countries in both regions (including in the trade sphere, which continues to hinder the conclusion of a free trade agreement between the EU and ASEAN), will continue to expand. This, in turn, serves as a foundation for strengthening cooperation in the field of security.

At the EU–ASEAN ministerial meeting in February 2024, the High Representative of the Union for Foreign Affairs and Security Policy, Josep Borrell, acknowledged that cooperation between the parties should take into account “different approaches to several issues” [29]. Ultimately, the prospects for strategic and economic cooperation between the EU and SEA countries, still far from fully realised despite mutual interest, depend on the political will of both sides to overcome existing contradictions and pursue compromise solutions.

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