

Deepening EU-Japan cooperation



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IN-DEPTH ANALYSIS

Deepening EU–Japan cooperation

ABSTRACT

The EU–Japan partnership has undergone a substantial transformation over the past two decades. Historically limited to trade and economic cooperation, the decision to step up political-security cooperation, recorded since the mid-2010s, is a result of both partners' shifting foreign policy outlooks against an increasingly volatile global strategic environment that is defined by a return of great power politics. The conclusion of the EU–Japan Strategic Partnership Agreement (SPA) in 2018 marks a symbolic upgrade in the relationship, reflecting a growing strategic alignment and willingness to address common global security challenges. Bilateral cooperation has so far increased, especially in the fields of economic security, maritime security, cybersecurity, sustainable connectivity, energy transition, digital transformation, as well as greater coordination within relevant multilateral international frameworks. However, the prospects for further cooperation are vast and many of the political agreements still need to be translated into action. This In-Depth Analysis traces the progress in EU–Japan cooperation achieved so far, highlighting the most promising areas for future collaboration based on both parties shared strategic interests, respective capacities, and political objectives.

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Abbreviations

SPA	Strategic Partnership Agreement
EPA	Economic Partnership Agreement
HLED	High-Level Economic Dialogue
JMSDF	Japanese Maritime Self-Defense Forces
MDA	Maritime Domain Awareness
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
JCPOA	Joint Comprehensive Plan of Action
NATO	The North Atlantic Treaty Organization
EU	The European Union
US	The United States of America
UK	The United Kingdom
FIMI	Foreign Information Manipulation and Interference
DPA	Digital Partnership Agreement
LSI	Large-Scale Integration
EUV	Extreme Ultraviolet
IRA	Inflation Reduction Act
UNFCCC	United Nations Framework Convention on Climate Change
DG ENER	European Commission's Directorate-General for Energy
LNG	Liquefied Natural Gas
DG ENV	European Commission's Directorate-General for Environment
DG GROW	European Commission's Directorate-General for International Market, Industry, Entrepreneurship and SMEs
METI	Japan's Ministry of Economy, Trade and Industry
DG TRADE	European Commission's Directorate-General for Trade
DG FISMA	European Commission's Directorate-General for Financial Stability, Financial Services and Capital Markets
JFSA	Financial Services of Japan
IPSF	International Platform on Sustainable Finance
ESG	Environmental, Social and corporate Governance
CMP	Coordinated Maritime Presences
EUMS	EU Military Staff
ESIWA	Enhancing Security in and With Asia
CBRN	Chemical, Biological, Radioactive, and Nuclear
CSDP	Common Security and Defence Policy
WTO	World Trade Organization
OECD	Organization for Economic Cooperation and Development
IAEA	International Atomic Energy Agency

MPIA	Multi-party Interim Appeal Arbitration Arrangement
ASEM	Asia-Europe Meeting
ASEF	Asia-Europe Foundation
ASEP	Asia-Europe Parliamentary Partnership
ESA	European Space Agency
JAXA	Japan Aerospace Exploration Agency
DG DEFIS	European Commission's Directorate-General for Defence Industry and Space
ISA	International Seabed Authority
EIB	European Investment Bank
JICA	Japan International Cooperation Agency
JBIC	Japan Bank for International Cooperation
NEXI	Nippon Export and Investment Insurance
FOIP	Japan's Free and Open Indo-Pacific
TTC	Transatlantic Trade and Technology Council
JOGMEC	Japan Organization for Metal and Energy Security
ASEAN	Association of Southeast Asian Nations
EFSD+	European Fund for Sustainable Development Plus
JCM	Joint Crediting Mechanism
AETI	Asia Energy Transition Initiative
CCUS	Asia Carbon Capture, Utilisation and Storage
GFC	Green Climate Fund
NSS	National Security Strategy
GCAP	Global Combat Air Programme
JASDF	Japan Air Self-Defense Force
PESCO	Permanent Structured Cooperation
EDF	European Defence Fund
R&D	Research and Development
CRIMARIO	EU's Critical Maritime Routes Indo-Pacific
FPA	Framework Participation Agreement
ITPP	Individual Tailored Partnership Programme
AP4	Four Asia-Pacific partners of NATO: Japan, Australia, New Zealand and the Republic of Korea
AFET	European Parliament's Committee on Foreign Affairs
EEAS	European External Action Service

Executive summary

EU–Japan relations have undergone a substantial transformation over the past two decades. Since the early 2000s, the two parties have often referred to each other as ‘strategic partners’, but initially the relationship was mostly defined in terms of trade and economic cooperation. The increased political-security cooperation which has been observed since the mid-2010s is a result of both partners’ evolving foreign policy outlooks against an increasingly volatile global security environment. The EU has become more aware of East Asia’s security challenges and their impact on its own stability and prosperity, and this has subsequently boosted its determination to engage more proactively in the region. For its part, Japan embarked on major national security reforms under the second mandate of Prime Minister Abe Shinzo (2013–2019), enhancing cooperation with global partners beyond its traditional alliance with the United States.

The deteriorating global security environment is at the core of the new-found strategic convergence between Tokyo and Brussels. China’s military build-up and growing security footprint, concerns over the reliability of the US security guarantees, and the intensifying US–China strategic competition have been the main common concerns. Russia’s invasion of Ukraine in February 2022 and the rapprochement between Beijing and Moscow has reinforced the common threat perception. Besides these strategic considerations, the two partners have been particularly engaged in addressing the so-called ‘non-traditional’ or ‘human’ security challenges, be they health, energy, food, information, or environmental security issues, which have all gained importance in recent years. Finally, both the EU and Japan share a strong commitment to multilateralism and the promotion of rules-based global order, which has been an important driver for bilateral cooperation and coordination within existing multilateral settings.

The conclusion of the EU–Japan SPA and Economic Partnership Agreement (EPA) in 2018 marks a symbolic landmark in the relationship, sealing the determination to address these common challenges. As an overarching framework, the SPA provides a political foundation for enhancing cooperation in a range of areas, further developed in subsequent agreements such as the EU–Japan Partnership for Sustainable Connectivity and Quality Infrastructure (2019), the EU–Japan Green Alliance (2021) and the EU–Japan Digital Partnership (2022). To date, significant progress has been achieved, especially in the fields of economic security, maritime security, cybersecurity, energy transition and digital transformation.

Economic security has become one of the most promising areas of cooperation in the context of the COVID-19 pandemic, which revealed the vulnerability of global supply chains for strategically critical goods and materials. The EU–Japan Economic and Digital Partnerships provide good frameworks to discuss cooperation on economic security issues, with the High-Level Economic Dialogue (HLED) leading to the conclusion of the Memorandum of Cooperation on Semiconductors and the agreement on cross-border data flows in 2023. Cooperation on cybersecurity has been a lasting common area of interest, with regular Cyber Dialogues held since 2014. The interconnection between economic security issues and the security and governance of the information space provides additional avenues for cooperation, including on foreign interference and information manipulation, which have been tackled as part of the EU–Japan Digital Partnership.

Cooperation on maritime security has been one of the longest standing common areas of interest, taking on more concrete forms with series of joint exercises between the Japanese Maritime Self-Defense Forces (JMSDF) and the EU’s anti-piracy mission ATALANTA in the Western Indian Ocean, culminating in the conclusion of an Administrative Arrangement in March 2023. The increased presence of various individual EU Member States’ navies in the Indo-Pacific — notably those of France, but also Germany, the Netherlands, and Italy — has also contributed to increasing interoperability and trust between the Japan and ‘Europe’ in general, with positive repercussions for the EU–Japan security cooperation. The EU’s promotion of Maritime Domain Awareness (MDA) in the Indian Ocean region and capacity building

initiatives with Southeast Asian countries have been applauded by Japan, providing possible opportunities for further cooperation.

Cooperation on climate change and green transition ranks high on both partners' political and normative agendas. The EU–Japan Green Alliance, anchored in the UN Paris Agreement on Climate Change, commits to cooperating on achieving climate and carbon neutrality by 2050 through dialogue and joint research projects. It also provides a useful platform for optimising institutional approaches, discussing engagement with the industry/private sector, as well as cooperating in and with third countries that could be further leveraged. Both the EU and Japan are prime promoters of sustainable financing, including social and environmental corporate governance, an item that can be pushed forward with greater coordination within relevant international fora.

While much has been achieved, the prospects for further cooperation are vast, and many of the existing political commitments still need to be translated into concrete action. Among the next areas of cooperation that the EU and Japan should focus on are the governance of the global commons and the need to constructively engage with the so-called 'Global South' countries. The efforts of authoritarian regimes to make the rules and shape a new world order are becoming increasingly apparent, especially in areas that are not yet fully governed by international law, be they new technologies, the information space, outer space or the deep seas. With their combined economic weight, technological advancement and normative power, the EU and Japan are well-positioned to take the lead in promoting norms and standards in these new areas that would be sustainable and equitable for all actors.

Résumé

Les relations entre l'UE et le Japon se sont considérablement transformées au cours des deux dernières décennies. Depuis le début des années 2000, les deux parties se sont souvent qualifiées mutuellement de "partenaires stratégiques", mais à l'origine, les relations se définissaient principalement par une coopération commerciale et économique. Le renforcement de la coopération en matière de politique et de sécurité observé depuis le milieu des années 2010 résulte de l'évolution des perspectives des deux partenaires en matière de politique étrangère, dans un contexte de sécurité mondiale de plus en plus instable. L'UE est devenue plus consciente des défis sécuritaires de l'Asie de l'Est et de leur impact sur sa propre stabilité et prospérité, ce qui a renforcé sa détermination à s'engager de manière plus proactive dans la région. Pour sa part, le Japon s'est engagé dans des réformes majeures en matière de sécurité nationale sous le second mandat du Premier ministre Shinzo Abe (2013-2019), renforçant la coopération avec des partenaires mondiaux au-delà de son alliance traditionnelle avec les États-Unis.

La détérioration de la sécurité mondiale est au cœur de la nouvelle convergence stratégique entre Tokyo et Bruxelles. Le renforcement militaire et l'empreinte sécuritaire croissante de la Chine, les inquiétudes quant à la fiabilité des garanties de sécurité des États-Unis ainsi que l'intensification de la concurrence stratégique entre les États-Unis et la Chine ont été les principales préoccupations communes. L'invasion de l'Ukraine par la Russie en février 2022 et le rapprochement entre Pékin et Moscou ont renforcé la perception commune de la menace. Outre ces considérations stratégiques, les deux partenaires se sont particulièrement engagés à répondre aux défis de sécurité dits "non traditionnels" ou "humains", qu'il s'agisse de questions de santé, d'énergie, d'alimentation, d'information ou de sécurité environnementale, qui ont toutes gagné en importance au cours des dernières années. Enfin, l'UE et le Japon partagent un engagement fort en faveur du multilatéralisme et de la promotion d'un ordre mondial fondé sur des règles, ce qui a été un moteur important de la coopération et de la coordination bilatérales dans le contexte multilatéral existant.

La conclusion de l'APS et de l'accord de partenariat économique (APE) entre l'UE et le Japon en 2018 marque une étape symbolique dans les relations, scellant la détermination à relever ces défis communs. En tant que cadre général, l'APS fournit une base politique pour renforcer la coopération dans un ensemble de domaines, développés dans des accords ultérieurs tels que le partenariat UE-Japon pour une connectivité durable et une infrastructure de qualité (2019), l'Alliance verte UE-Japon (2021) et le partenariat numérique UE-Japon (2022). À ce jour, des progrès significatifs ont été réalisés, notamment dans les domaines de la sécurité économique, de la sécurité maritime, de la cybersécurité, de la transition énergétique et de la transformation numérique.

La sécurité économique est devenue l'un des domaines de coopération les plus prometteurs dans le contexte de la pandémie COVID-19, qui a révélé la vulnérabilité des chaînes d'approvisionnement mondiales pour les biens et matériaux d'importance stratégique. Les partenariats économique et numérique entre l'UE et le Japon constituent de bons cadres pour discuter de la coopération sur les questions de sécurité économique, le dialogue économique de haut niveau (HLED) ayant conduit à la conclusion du mémorandum de coopération sur les semi-conducteurs et de l'accord sur les flux de données transfrontaliers en 2023. La coopération en matière de cybersécurité est de même un domaine d'intérêt commun durable, avec des cyberdialogues réguliers depuis 2014. L'interconnexion entre les questions de sécurité économique et la sécurité et la gouvernance de l'espace d'information offre d'autres possibilités de coopération, notamment en ce qui concerne l'ingérence étrangère et la manipulation de l'information, qui ont été abordées dans le cadre du partenariat numérique entre l'UE et le Japon.

La coopération en matière de sécurité maritime est l'un des domaines d'intérêt commun les plus anciens, se concrétisant par une série d'exercices conjoints entre les forces maritimes d'autodéfense japonaises (JMSDF) et la mission anti-piraterie ATALANTA de l'UE dans l'océan Indien occidental, qui ont abouti à la

conclusion d'un arrangement administratif en mars 2023. La présence accrue des marines de plusieurs États membres de l'UE dans l'Indo-Pacifique - notamment celles de la France, mais aussi de l'Allemagne, des Pays-Bas et de l'Italie - a également contribué à renforcer l'interopérabilité et la confiance entre le Japon et l'"Europe" en général, ce qui a eu des retombées positives sur la coopération entre l'UE et le Japon en matière de sécurité. La promotion par l'UE de la connaissance du domaine maritime (MDA) dans la région de l'océan Indien et les initiatives de renforcement des capacités avec les pays d'Asie du Sud-Est ont été applaudies par le Japon, ce qui ouvre des perspectives pour une coopération plus étroite.

La coopération en matière de changement climatique et de transition écologique figure en tête des agendas politiques et normatifs des deux partenaires. L'Alliance verte UE-Japon, ancrée dans l'accord de Paris des Nations unies sur le changement climatique, s'engage à coopérer pour atteindre la neutralité climatique et carbone d'ici 2050 par le dialogue et des projets de recherche communs. Elle offre également un espace utile pour optimiser les approches institutionnelles, discuter de l'engagement avec l'industrie/le secteur privé, ainsi que de la coopération dans et avec les pays tiers qui pourraient être davantage mis à contribution. L'UE et le Japon sont les premiers promoteurs du financement durable, y compris de la gouvernance sociale et environnementale des entreprises, un point qui peut être mis en avant avec une plus grande coordination au sein des forums internationaux concernés.

Bien que beaucoup de choses aient été accomplies, les perspectives de coopération future sont vastes et de nombreux engagements politiques existants restent encore à traduire en actions concrètes. Parmi les prochains domaines de coopération sur lesquels l'UE et le Japon devraient se concentrer figurent la gouvernance des biens communs mondiaux et la nécessité de s'engager de manière constructive avec les pays dits du "Sud". Les efforts des régimes autoritaires pour établir les règles et façonner un nouvel ordre mondial sont de plus en plus évidents, en particulier dans les domaines qui ne sont pas encore entièrement régis par le droit international, à savoir les nouvelles technologies, l'espace de l'information, l'espace extra-atmosphérique ou les mers profondes. Grâce à leur poids économique, à leur avancée technologique et à leur pouvoir normatif, l'UE et le Japon sont bien placés pour prendre l'initiative de promouvoir des normes dans ces nouveaux domaines qui seraient durables et équitables pour tous les acteurs.

1 Introduction

The EU and Japan have entered a new phase of their bilateral relations. While Brussels and Tokyo have already often referred to each other as ‘strategic partners’¹ since the early 2000s,² the relationship has been mostly limited to trade and economic cooperation, with only rudimentary interaction in the field of security and defence, as well as basic coordination on other global issues. Indeed, throughout the early 2000s, Brussels has invested much of its energy into building a stable political relationship with Beijing, while Tokyo’s efforts have been traditionally concentrated on fostering its vital security alliance with Washington. Much has changed over the past two decades, both at the systemic level and within the two partners’ respective security outlooks and political agendas, leading to an unprecedented convergence of strategic interests.

The upgrade in the EU–Japan relationship can be traced back to 2016, a year marked by a) a change in the US foreign policy; b) Brexit; and c) Europe’s awakening to the ‘China challenge’. A second wave of rapprochement has followed Russia’s invasion of Ukraine in 2022, along with increasing closeness between Moscow and Beijing, triggering significant strategic alignment between the two partners.

The election of Donald J. Trump in November 2016 and the shifting attention to domestic affairs under the ‘America first’ policy triggered a sense of insecurity among all US allies, resulting in growing interest in diversifying security ties, both across the Atlantic and in the Pacific. The US decision to withdraw from key multilateral structures, such as the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the Pacific Climate Pact, and the Joint Comprehensive Plan of Action (JCPOA) with Iran, as well as their vocal criticism of NATO and the EU as such, has generated much controversy in Europe and globally, realising the vulnerability of the US-led international system.

Secondly, the UK decision to leave the European Union triggered a shockwave across Europe, but also in Tokyo. Historically, the UK has been one of Japan’s closest partners and inspirations, including for its governmental institutions and economic model. As a close trading partner, Japan voiced concerns over the implications of the decision on global stability, urging both parties to solve their differences without disrupting economic flows.³ In many ways, Brexit was also perceived as a demonstration of a crisis of multilateralism, which has always been at the heart of Japan’s foreign policy. As a result, Tokyo has shifted much of its attention to the continent, not only economically, but also politically – including Brussels, along with other major European capitals.

Finally, the EU’s new-found political awareness of the ‘China challenge’ contributed significantly to the growing strategic alignment between the two like-minded partners. Revelations of the Huawei espionage scandals in 2015, suspicions over the ‘16+1’ framework, as well as progressive investigations into the many acquisitions of Chinese companies in Europe’s strategic infrastructure (telecom, ports, robotics, etc.), among others, have led Brussels to rethink its position on China, resulting in its 2019 ‘triptych’ definition. This was coined in the 2019 Communication on China as a ‘negotiating partner’, ‘economic competitor’ and ‘systemic rival’,⁴ and still defines the Union’s policy towards Beijing today. The COVID-19 pandemic and the emergence of the so-called ‘wolf warrior’ diplomacy in this context only plummeted China’s image in Europe. The second wave of rapprochement has been enabled by Russia’s aggression against Ukraine

¹ See, for instance, the European Security Strategy 2003; or speech by EU Foreign policy representative Javier Solana, ‘The common foreign and security policy – The EU’s strategic partnership with Japan’, at Keio University, Tokyo (24 April 2006).

² Commission of the European Communities, Communication from the Commission, ‘Europe and Asia – A strategic framework for enhanced partnerships’ (2001): <https://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2001:0469:FIN:EN:PDF>.

³ Ministry of Foreign Affairs of Japan, ‘Japan’s message to the United Kingdom and the European Union’: <https://www.mofa.go.jp/files/000185466.pdf>.

⁴ ‘EU-China – A Strategic Outlook’ (March 2019): <https://commission.europa.eu/system/files/2019-03/communication-eu-china-a-strategic-outlook.pdf>.

and Russia's rapprochement with China in February 2022, giving an impetus for enhanced cooperation, notably in the field of security and defence (see details in section 2.4).

Overall, the EU and Japan share a number of similar concerns and interests. First, they are both major global trading powers that are highly attached to and **dependent on free trade** and liberal economic values, and try to promote a free, rules-based order with a strong emphasis on existing multilateral institutions and cooperation. While they are both concerned about China's growing assertiveness and global strategic footprint, they are also **reluctant to cut ties with Beijing**, which would impede their economic growth and competitiveness. At the same time, given their limited security toolbox, they both **rely on the United States** for their defence. Consequently, and perhaps most importantly in the current geopolitical and geo-economic context, they both try to **navigate the ongoing US–China rivalry**, juggling their strategic and economic interests as best they can, which constitutes one of the most sensible incentives for their ever-growing closeness.

Another factor that has contributed to the EU–Japan rapprochement over the past decade is simply the **changing global security environment**, which has become more complex, more severe and multilayered. The emergence of so-called 'hybrid threats', combining conventional and non-conventional tactics, including diplomatic pressure, foreign information manipulation and interference (FIMI), economic coercion, and technological, scientific and legal warfare, have become commonplace, blurring the line between military and civilian activities and defying geographical borders. While Japan continues to rely on the US security umbrella in terms of traditional defence capabilities, it has also realised that for cooperation on economic security, hybrid threats, reforms of international institution, global issues (such as climate change and green transition), as well as outreach to the so-called 'Global South', the EU can be a much-valued partner. In that respect, strengthening bilateral **cooperation fulfils both partners' political ambition to become proactive contributors to global stability** and prosperity.

The growing alignment of strategic interests resulted in the conclusion of the EPA and the SPA in 2018 (in force provisionally since 2019 until all member states ratify it), which vow to operationalise the bilateral relationship and move towards more practical cooperation in a variety of areas. The adoption of the **EU's Indo-Pacific Strategy in 2021** has greatly contributed to this alignment, persuading Japan of Europe's commitment to regional affairs, as well of the very much convergent approach to its management: through openness, transparency, inclusiveness, cooperation, sustainability, and respecting the rule of law.⁵ A subsequent set of bilateral agreements on Sustainable Connectivity and Quality Infrastructure (2019),⁶ Green Alliance (2021)⁷ and the Digital Partnership (2022)⁸ followed suit, aiming to elaborate on the political frameworks and facilitate more hands-on cooperation in the various priority areas, which are described in more detail in the below sections of this report.

While many promising initiatives have been put in place and new projects are still in the pipeline, the full potential of the EU–Japan Strategic Partnership is still to be developed. Despite ever-close political relations, the two partners still face several **limitations**, notably related to **geographical distance, legal systems, and financial and human resources**. For the EU, stability in the immediate neighbourhood – notably, Russia/the Eastern Neighbourhood, the Middle East, the Mediterranean and Africa – is still prime in its overall strategic considerations, which inevitably influences the allocation of its diplomatic, economic

⁵ 'Joint communication to the European Parliament and the European 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.

⁶ https://www.eeas.europa.eu/sites/default/files/the_partnership_on_sustainable_connectivity_and_quality_infrastructure_between_the_european_union_and_japan.pdf.

⁷ EU–Japan Green Alliance: <https://www.consilium.europa.eu/media/49932/eu-japan-green-alliance-may-2021>.

⁸ Digital Agency of Japan, 'Japan-EU Digital Partnership' (12 May 2022): https://www.digital.go.jp/assets/contents/node/information/field_ref_resources/b530adc8-3af1-4d9f-af84-6f21af4067af/b2447bdc/20220512_news_digital_group_original_02.pdf.

and military resources. Similarly for Japan, security concerns in its immediate neighbourhood and its vital relationship with the US take priority over developments in geographically more distant areas, making it difficult to push greater involvement domestically. Legal limitations, such as easing jurisdiction on arms exports in the case of Japan, for instance, are among other pending adjustments that need to be addressed to push the relationship further. However, given the unprecedented political willingness on both sides, there is certainly place for optimism about overcoming these remaining gaps over time.

1.1 Objectives, approach and methodology

The analysis will pursue three main objectives.

It will first map out current cooperation between the EU and Japan in a structured way, summarising and analysing the current areas of cooperation on economic security, climate change and green transition, security and defence, multilateral fora, and other areas. It will assess this cooperation to **(1)** identify the areas in which it has been the most and least advanced, highlighting reasons why it is stronger in some areas and weaker in others; and **(2)** comment on the effectiveness of instruments and arrangements already in place.

Based on interviews with EU and Japanese officials, European and Japanese experts, as well as desktop research, the analysis will then assess possibilities for increased cooperation in the key areas listed above. This assessment will also serve to identify gaps in the EU's partnership with Japan, laying out the specific areas for which efforts should be reinforced or newly established.

On the basis of these possibilities and gaps, and the identification of the tools and practices supporting cooperation between the EU and Japan, the analysis will provide recommendations to the EU in general, and to the European Parliament in particular, on how to deepen cooperation between the EU and Japan.

1.2 Political context

The current positive momentum in the EU–Japan partnership has been enabled by several internal and external geopolitical factors, some of which are already described in the introduction of this report. In the most recent context, the deteriorating security environment in Europe and East Asia has added a sense of urgency and an impetus to strengthening cooperation, especially in the field of security and defence. Russia's war in Ukraine, China's military build-up and assertiveness, and North Korea's nuclear ambitions are arguably the most acute traditional concerns shaping Japan's new security posture and rapprochement with like-minded partners, including Europe. Needless to say, all of the above developments are significantly impacted by the mounting US–China strategic competition. However, the overall political context in which the EU and Japan operate is much broader and goes beyond security and defence.

As two major global trading powers, Japan and Europe share a strong commitment to the promotion of free, open, multilateral and rules-based global order, be it in the field of economy, sustainable connectivity, or science and technology, which have become weaponised in the context of the US–China rivalry. Besides that, the recent experiences of trade disruptions during the COVID-19 pandemic, but also caused by maritime route obstructions (such as the Evergreen incident in the Suez Canal), constitute a major source of concern, but also a push for potential cooperation between the two partners.

Russia's invasion of Ukraine was undeniably a watershed moment. For Japan, it marked the end of its positive engagement with Moscow advocated for during the Abe era, which was meant to: a) resolve its lasting sovereignty dispute over the Northern Territories (Southern Kuriles); and b) manage and ideally prevent Russia's growing ties with China. Post-February 2022, Japan was among the first to condemn the aggression, imposing sanctions on and cutting its ties with Moscow, as well as providing generous assistance to Kyiv in terms of humanitarian, financial and military (non-lethal) aid. This shift has had multiple effects on its relationship with Europe (both with the EU and within the NATO context), aligning

both partners' strategic perceptions and priorities.⁹ The EU's swift, unanimous, and substantial reaction to the crisis has also boosted its international image as a security actor worth engaging with.¹⁰ The increased commitment to defence spending on both sides finally opens more concrete perspectives for future defence cooperation. The political message seems to be clear: as much as Japan is opposed to the unilateral change of status quo in Ukraine, the same is expected from Europe should a similar crisis arise in Asia.

The **Russia–China rapprochement**, sealed by the 'no-limit' friendship declaration shortly before Ukraine's aggression, has alerted the world to the danger the two revisionist powers represent for the free, open and rules-based global order. Beijing's support of Moscow throughout the conflict has plummeted its image in Europe, including in countries traditionally more favourable to its rise and influence. The possibility of a similar situation arising in the Indo-Pacific, summarised by Prime Minister Kishida's landmark quote that 'Ukraine may be the East Asia of tomorrow',¹¹ has clearly attracted Europe's attention to Japan's own security concerns, be it in the Taiwan Strait, the East China Sea, or in relation to North Korea. Since 2022, China has multiplied live-fire military exercises over Taiwan – intrusions beyond the median line – and launched several missiles that landed in Japan's exclusive economic zone.¹² North Korea fired over 40 cruise and ballistic missiles in 2022 alone, often overflying Japanese territory.¹³ Pyongyang's close relationship with Russia and new reports of possible cooperation on satellite technologies¹⁴ further amplify Japan's concerns. Tokyo's decision to double down on defence spending in its revised 2022 National Security Strategy reflects the ever-hostile security environment it faces.¹⁵

The above security developments need to be understood within the broader context of the accentuating **US–China strategic rivalry**, which goes far beyond the military realm. The Russia–China rapprochement highlights the ambition of authoritarian regimes to join forces in shaping a new world order, generating various degrees of sympathy among other countries, especially in the so-called Global South, sharing a sense of dissatisfaction, frustration, and unfair treatment by the West. This **growing polarisation** entails several implications for Japan and the EU, including the weakening of multilateral institutions, the emergence of competing systems of governance, and the general weaponisation of virtually all sectors of international activity. Importantly, the all-encompassing strategic competition prevents the formulation of a comprehensive approach to critical global issues, such as **climate change, health security, environmental degradation and resource depletion**, which will only exacerbate existing geopolitical tensions if not addressed in a timely, inclusive and sustainable manner. The need to engage with the Global South opens an important field of opportunity for the EU–Japan Partnership in the future.

⁹ Celine Pajon and Eva Pejsova, 'Rapprochement in Times of Crisis: the War in Ukraine and the EU – Japan Partnership', CSDS Policy Brief (April 2022): https://prod-b4156475194d8706-vub.paddlecms.net/sites/default/files/2022-11/CSDS%20Policy%20brief_2209_2.pdf

¹⁰ Ibid.

¹¹ Josh Rogin, 'Japan's Prime Minister warns of a historic — and dangerous — moment in Asia', The Washington Post (11 January 2023): <https://www.washingtonpost.com/opinions/2023/01/11/japan-prime-minister-rearmament-china-north-korea/>.

¹² Reuters, 'Japan protests after Chinese missiles land in its exclusive economic zone', Reuters, (4 August 2022): <https://www.reuters.com/world/asia-pacific/japan-protests-after-chinese-missiles-land-its-exclusive-economic-zone-2022-08-04/>.

¹³ Kim, Hyung-jin, Kim Tong-hyung and Mari Yamaguchi, 'North Korea sends missile soaring over Japan in escalation', Associated Press, (4 October 2022), <https://apnews.com/article/seoul-south-korea-north-joint-chiefs-of-staff-1026206c80666f1fcd3983ebf45e14b>.

¹⁴ Le Monde with AP, 'Kim pledges Putin North Korea's full support for Russia's 'sacred fight'', Le Monde (13 September 2023) https://www.lemonde.fr/en/international/article/2023/09/13/kim-pledges-putin-north-korea-s-full-support-for-russia-s-sacred-fight_6133937_4.html.

¹⁵ National Security Strategy of Japan (December 2022): <https://www.cas.go.jp/jp/siryoku/221216anzenhoshou/nss-e.pdf>

2 Overview and assessment of EU–Japan cooperation

2.1 Ambitions and aims of EU–Japan cooperation

The growing number of shared concerns in recent years has led to an increasing convergence of strategic perspectives, unlocking the potential for greater cooperation between the EU and Japan. The conclusion of the EPA and the SPA in 2018 (in force provisionally since 2019 until all member states ratify it) after five years of negotiations marked a distinct upgrade in the relationship, defined by a more ambitious political agenda, closer coordination on global affairs, and determination to translate political commitment into concrete actions. In that respect, the SPA provides an overarching political framework, sealing a common ambition to work closer together on addressing a broad range of global issues ranging from security, health, technology, and environment to cultural and social affairs.¹⁶

Enhancing bilateral cooperation serves to fulfil several essential objectives. First and foremost, it intends to boost both partners' resilience and capacity to better defend their economic and strategic interests globally. In economic terms, this translates into keeping markets open and free to sustain their growth and competitiveness, all the while protecting their sovereignty and control over strategically sensitive technologies and sectors, which justifies the extensive focus on economic security. Against the Sino–American rivalry, it basically implies a careful balancing act between the strategic interests of their key security allies: the United States on the one hand, and China, their indispensable economic partner, on the other.

In security terms, both Japan and the EU could be traditionally qualified as mostly civilian, 'herbivorous'¹⁷ powers – ones that strive for a safe, stable, rules-based, multilateral environment, but that can easily fall prey to their more assertive and militarily capable neighbours. Although both have been investing in boosting their defence and security profiles, they remain largely dependent on the US security umbrella. In this context, the war in Ukraine has increased the sense of vulnerability in Europe, but also in Japan, which is wary of US resources and operational capabilities shifting away from Asia. The recognition of the interconnectedness of the European and Asian theatres¹⁸ has underscored the importance of fostering communication capabilities and interoperability among US allies in both regions from a cross-theatre perspective.¹⁹ Strengthening EU–Japan security cooperation therefore fulfils the triple goal of alleviating the US security burden, moving towards a networked security architecture among like-minded democracies, and at the same time developing a separate bilateral channel to boost each other's defence, industrial and technological capacities.

Finally, the heavy focus on non-traditional security issues and the provision of common goods, such as sustainable connectivity, energy transition, green transition and digitalisation, distinguishes the EU–Japan partnership, helping to reinforce both partners' international reputation as forces for good. Development assistance, be it technical, human, legal or financial, has traditionally been at the roots of both Japan and the EU's foreign policy. High quality standards, trustworthiness, transparency, and respect for the rule of law still constitute the attractiveness of the two partners, which can be capitalised on in their engagement with third parties and organisations. Joining forces to address climate change, resource conservation and

¹⁶ See full document at: EU–Japan https://www.eujapanspa.jp/files/ugd/afc851_19b4f6d7c95646a29ef844913ed7b4de.pdf.

¹⁷ Ivan Krastev and Mark Leonard, 'The rise of 'herbivorous' powers?', ECFR Commentary (October 2007): https://ecfr.eu/article/commentary_gallup_poll_results/.

¹⁸ Luis Simon, Daniel Fiott and Octavian Manea, 'Two Fronts, One Goal: Euro-Atlantic Security in the Indo-Pacific Age', The Marathon Initiative (August 2023): <https://themarathoninitiative.org/wp-content/uploads/2023/08/Two-Fronts-One-Goal-website-publication-v.2.pdf>.

¹⁹ Luis Simon and Zack Cooper, 'Rethinking trade-offs between Europe and the Indo-Pacific', War on the Rocks Commentary (May 2023): <https://warontherocks.com/2023/05/rethinking-tradeoffs-between-europe-and-the-indo-pacific/>.

environmental issues, among others, is not only necessary, but also increases their political legitimacy as responsible global players.

2.2 Cooperation on economic security

Economic security has emerged as one of the prospective areas for cooperation between Tokyo and Brussels, as highlighted in the last EU–Japan Summit in Brussels in July 2023.²⁰ The issue has gained importance in the context of the global economic fallout related to the COVID-19 pandemic, making many advanced democratic countries rethink their excessive dependency on a single player – China. The growing US–China strategic rivalry and weaponisation of economic linkages has further accentuated the need to invest in supply chain security and resilience, effective anti-coercion mechanisms, as well as protection of sensitive technology and critical infrastructure, for the sake of maintaining their economic and technological competitiveness and sovereignty. However, while both Japan and the EU share concerns about China’s growing global economic – and strategic – clout, they are also worried about Washington’s over-reach, opting for a ‘de-risking’ approach, rather than ‘de-coupling’.²¹

Japan has become accustomed to China’s economic coercion, with its companies facing public backlash or bans because of periodical political stand-offs related to ongoing territorial disputes or historical grudges. China is the largest export destination of Japanese goods, hitting 22.1% in 2020. It supplies 45% of Japanese imports of electrical and electronic products.²² Highly dependent on China’s trade, industrial production and strategic commodities, Japan has accumulated unique experiences dealing with temporary disruptions to its supply chains and can serve as an example to many countries exposed to similar vulnerabilities around the world. The EU has significantly stepped up its own economic security toolbox through its new Joint Communication on Economic Security (June 2023)²³, the agreement on a new ‘anti-coercion instrument’, and the adoption of the EU ‘Chips Act’ (July 2023). Against growing concerns over China’s expanding political clout on the European continent, interest in and potential to enhance exchanges and cooperation in the field of economic security with Japan has gained unique political momentum.

Concrete initiatives have been put in place in this domain through various channels, notably within the framework of the EU–Japan EPA, the EU–Japan Digital Partnership Agreement (DPA), and the EU–Japan Partnership on Sustainable Connectivity and Quality Infrastructure. Since the **EPA** entered into force in 2019, bilateral trade between the EU and Japan has skyrocketed, with bilateral trade hitting a record value of EUR 141 billion in 2022.²⁴ The EPA provides a useful framework for cooperation on economic issues more broadly, with regular meetings and high-level dialogues addressing ongoing geopolitical developments and security risks to each other’s increasingly intertwined economies.

Another useful framework that helps to boost economic security cooperation has been the ‘**EU–Japan Digital Partnership**’, launched at the bilateral summit in 2022. Under the Digital Partnership, Brussels and Tokyo vow to join forces in areas such as digital connectivity, cybersecurity, Artificial Intelligence (AI), 5G technologies, quantum computing, and semiconductor supply chains. Cooperation on semiconductor production and supply chain security is perhaps the most relevant in the context of economic security.

²⁰ Joint Statement of the EU – Japan Summit (13 July 2023): <https://www.consilium.europa.eu/media/65790/joint-statement-st11825-en23.pdf>.

²¹ Glosserman, Pajon and Pejsova, ‘After Hiroshima: The G7 Summit, Economic Security, and the EU–Japan Partnership’, CSDS Policy Brief (June 2023): https://prod-b4156475194d8706-vub.paddlecms.net/sites/default/files/2023-06/CSDS%20Policy%20brief_2318_0.pdf.

²² ‘Japan’s supply chains at risk’: <https://www.nippon.com/en/in-depth/d00907/>.

²³ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52023JC0020>.

²⁴ Share of EU27 in the World Trade, Eurostat Data, https://ec.europa.eu/eurostat/databrowser/view/ext_lt_introeu27_2020/default/line?lang=en.

During the first meeting of the Japan–EU Digital Partnership Council in July 2023,²⁵ the two parties signed a **Memorandum of Cooperation on Semiconductors** through which they agree to join forces in research and development, establishing early warning mechanism on critical disruption in the semiconductors supply chain, and cooperating on advanced skills for the semiconductor industry.²⁶

The **EU ‘Chips Act’**²⁷, adopted in July 2023, shall provide further ground for cooperation on semiconductors, but also AI and digital infrastructure. According to Thierry Breton, the EU’s industry chief, the EU will support Japanese semiconductor companies that would consider operating within the bloc.²⁸ During his visit to Japan on the occasion of the first EU–Japan Digital Partnership Ministerial talks, the two parties also agreed to facilitate exchanges of researchers and engineers involved in the development of sensitive technologies, as well as to encourage joint ventures benefitting from government funding. The Japanese project Rapidus, aimed at producing next generation 3D large-scale integration (LSI) technology in cooperation with the US (and Europe), already relies on research on extreme ultraviolet (EUV) lithography technology by the Belgium-based research institute imec.²⁹

The increasing alignment between Brussels and Tokyo on economic issues has led to greater coordination within international fora. One noticeable example has been the G7 Leaders’ Joint Communiqué, published after the Hiroshima Summit in May 2023, which mentions ‘de-risking’, not ‘de-coupling’.³⁰ Attached to the free market and liberal values, the two partners also share concerns about some of US’s economic policies that bare a protectionist flavour, such as the 2022 Inflation Reduction Act (IRA), which puts the Japanese and European car industries at a disadvantage.³¹ Similar concerns also ring a bell for other like-minded regional partners, notably South Korea. In light of such challenges, there is an open potential for the EU and Japan to join forces in the promotion of effective economic **anti-coercion mechanisms**. The EU’s adoption of an ‘anti-coercion instrument’ has been well perceived by Japan in that respect and could potentially serve as inspiration for G7 or other multilateral settings.

2.3 Cooperation on climate change and green transition

Climate change and the green transition are fundamental issue-areas globally, and the EU–Japan relationship is no exception. In the context of global warming, a growing number of extreme weather events, rising average temperatures and sea levels and their effects (including preventable climate change-related deaths, climate migration and biodiversity loss), it has become imperative to address the root causes and consequences of human-made climate change. To this end, a growing number of countries and private firms across the world have pledged to become carbon neutral in the coming decades, and to support a green transition that will make economic growth models more sustainable and less harmful for the environment. In this context, in November 2018, the EU pledged to become climate neutral by 2050,

²⁵ Japan–EU Joint Statement of the first meeting of the EU–Japan Digital Partnership Council (3 July 2023):

<https://www.meti.go.jp/press/2023/07/20230703003/20230703003-4.pdf>

²⁶ Memorandum of Cooperation on Semiconductors: <https://www.meti.go.jp/press/2023/07/20230704002/20230704002-1.pdf>.

²⁷ European Chips Act, 21 September 2023, https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/european-chips-act_en#:~:text=The%20European%20Chips%20Act%20will,technological%20leadership%20in%20the%20field.

²⁸ Sam Nussey, “EU, Japan to deepen cooperation on semiconductors”, Breton says’, Reuters (3 July 2023):

<https://www.reuters.com/technology/eu-japan-deepen-chip-cooperation-breton-2023-07-03>.

²⁹ ‘Imec signed a Memorandum of Understanding to join Rapidus Core Partners Programme’ (April 2023): <https://www.imec-int.com/en/press/rapidus-japans-newly-founded-chip-manufacturer-joins-imecs-core-partner-program>.

³⁰ G7 Leaders Communiqué (June 2023): <https://www.consilium.europa.eu/en/press/press-releases/2023/05/20/g7-hiroshima-leaders-communicue/>.

³¹ Reuters, ‘Japan government sounds alarm over US EV tax credits’, Reuters (5 November 2022):

<https://www.reuters.com/business/autos-transportation/japan-government-sounds-alarm-over-us-ev-tax-credits-2022-11-05/>.

meaning that its economy will have net-zero greenhouse gas emissions by that year.³² Meanwhile, in October 2020, Japan committed to achieving carbon neutrality by 2050, also meaning net-zero greenhouse gas emissions by then.³³ Furthermore, both Brussels and Tokyo have expressed their commitment to the United Nations Framework Convention on Climate Change (UNFCCC) Paris Agreement on Climate Change, concluded in December 2015.³⁴

Concrete EU–Japan cooperation on climate change and green transition was formalised in the **Green Alliance**, adopted on the occasion of the 27th bilateral summit in May 2021. The Green Alliance commits Brussels and Tokyo to working together to achieve a climate neutral, biodiversity-friendly and circular economy to achieve green growth and net-zero gas emissions by 2050. The Green Alliance is anchored by the Paris Agreement, as well as by the EU and Japan’s respective climate and carbon neutrality pledges. The Green Alliance highlights five fields of cooperation: energy transition, environmental protection, regulatory and business cooperation, research and development, and sustainable finance.³⁵ The bilateral High-Level Dialogue on Climate Change, usually held following the UNFCCC Annual Climate Change Conference, serves as the venue for the EU and Japan to discuss issues related to climate change.³⁶ The Green Alliance has the potential to become the primary driver of EU–Japan climate change and green transition cooperation, helping to agree priorities, agencies in charge of different aspects of this cooperation, potential private sector and third country partners, and other aspects necessary for the EU and Japan to work together.

With regards to **energy transition**, the focus is on ‘adopting low-carbon technologies, including renewable energy, renewable hydrogen, energy storage, and carbon capture, utilisation, and storage.’³⁷ The two partners already have an energy dialogue in place, led by the Commission’s Directorate-General for Energy (DG ENER), which serves at the platform for policy-makers and other experts to discuss these topics.³⁸ In addition, Brussels and Tokyo agreed to launch an energy security dialogue on liquefied natural gas (LNG) in July 2023.³⁹ To a large extent, the dialogue was prompted by Russia’s invasion of Ukraine, and Japan’s decision to divert some of its LNG shipments to Europe in the early months of the conflict. This comes on top of a Memorandum of Cooperation to promote a liquid, flexible, and transparent global LNG market which was launched in July 2017.⁴⁰ In addition, in December 2022 the EU and Japan also signed a

³² European Commission, 2050 long-term strategy, 2023, https://climate.ec.europa.eu/eu-action/climate-strategies-targets/2050-long-term-strategy_en

³³ METI, Japan’s Roadmap to ‘Beyond-Zero’ Carbon, 2023, https://www.meti.go.jp/english/policy/energy_environment/global_warming/roadmap/

³⁴ United Nations, The Paris Agreement, 2023, <https://www.un.org/en/climatechange/paris-agreement>

³⁵ European Commission, The EU and Japan commit to a new Green Alliance to work towards climate neutrality, 27 May 2021, https://climate.ec.europa.eu/news-your-voice/news/eu-and-japan-commit-new-green-alliance-work-towards-climate-neutrality-2021-05-27_en

³⁶ Delegation of the European Union to Japan, Trade and Investment Relations / EU–Japan Policy Dialogues, 9 February 2023, https://www.eeas.europa.eu/japan/european-union-and-japan-trade-and-investment-relations-EU-JapanEU-Japan-policy-dialogues_en?s=169

³⁷ Ibid.

³⁸ European Commission, EU–Japan cooperation on energy issues, 2023, https://energy.ec.europa.eu/topics/international-cooperation/key-partner-countries-and-regions/japan_en

³⁹ European Commission, EU and Japan to reinforce energy cooperation through a dedicated dialogue on global LNG architecture (18 July 2023): https://energy.ec.europa.eu/news/eu-and-japan-reinforce-energy-cooperation-through-dedicated-dialogue-global-lng-architecture-2023-07-18_en#:~:text=The%20dedicated%20dialogue%20will%20focus.strategic%20energy%20partnership%20with%20Japan.

⁴⁰ Memorandum of Cooperation between the European Commission, on behalf of the European Union, and the Ministry of Economy, Trade and Industry of Japan, on Promoting and Establishing a Liquid, Flexible and Transparent Global Liquefied Natural Gas Market in the context of enhancing EU–Japan cooperation on secure and sustainable energy (11 July 2017), https://energy.ec.europa.eu/system/files/2017-07/japanmoc2017_energy_0.pdf.

Memorandum of Cooperation on Hydrogen to spur innovation and develop an international market.⁴¹ In other words, the EU and Japan are engaging in practical steps to work together to support the energy transition. The move from discussion to practical cooperation is welcomed, since it gives substance to EU–Japan relations, and prevents the accusation that both partners are merely engaging in dialogue for the sake of it.

As for **environmental protection**, the EU and Japan maintain a well-established High-Level Dialogue on Environment, led by the Commission’s Directorate-General for Environment (DG ENV). It was held for the nineteenth time in January 2023.⁴² Besides their support for the Paris Agreement, the two sides also base their cooperation in this area on the Kunming-Montreal Global Biodiversity Framework, adopted in December 2022.⁴³ The framework’s main goal is to maintain, enhance or restore the integrity, resilience and connectivity of ecosystems. In order to promote and strengthen environmental protection, the EU and Japan are focusing on biodiversity, circular economy and pollution.⁴⁴ The three of them are interlinked and must therefore be dealt with holistically (rather than separately) for the benefit of the EU and Japan.

In the area of **regulatory and business cooperation**, the EU and Japan coordinate across different channels. Key among them is the EU–Japan Centre for Industrial Cooperation, established in 1987 and today managed as a joint venture between the Commission’s Directorate-General for International Market, Industry, Entrepreneurship and SMEs (DG GROW) and Japan’s Ministry of Economy, Trade and Industry (METI).⁴⁵ A key focus of the EU–Japan Centre is decarbonisation, notably via three actions: green business matchmaking, business cooperation in/with third countries, and industrial cluster cooperation towards green transition.⁴⁶ As for regulatory cooperation more specifically, the EU and Japan maintain a Regulatory Dialogue launched in the framework of their EPA, which involves the Commission’s Directorate-General for Trade (DG TRADE) and DG GROW.⁴⁷ Industry is obviously a key actor in addressing climate change and promoting green growth. In the specific case of Japan, the big conglomerates (*keiretsu*) that play a central role in the economy have a close relationship with the government, hence the need to engage with them regularly.

When it comes to **research and development**, the EU and Japan have a long-standing relationship. While not specific to climate change and the green transition, the EU and Japan signed an agreement on cooperation in science and technology that entered into force in 2011.⁴⁸ This was supplemented by a joint vision adopted in 2015, which already established the environment and energy as priority areas. Actions included in the vision are establishing a mechanism for joint research funding, developing measures to enhance the mobility of researchers, closer consultation and cooperation on policies, and fostering public

⁴¹ Memorandum of Cooperation on Hydrogen between the European Commission, on Behalf of the European Union and the Ministry of Economy, Trade and Industry of Japan (2 December 2022): https://energy.ec.europa.eu/system/files/2022-12/C_2022_8622_1_EN_annexe_acte_autonome_nlw_part1.pdf.

⁴² European Commission, 19th Japan–EU High-Level Dialogue on Environment (23 January 2023): https://environment.ec.europa.eu/news/19th-japan-eu-high-level-dialogue-environment-2023-01-23_en

⁴³ Kunming-Montreal Global Diversity Framework (10 April 2023): <https://www.cbd.int/gbf/>

⁴⁴ European Commission, 19th Japan–EU High-Level Dialogue on Environment (23 January 2023): https://environment.ec.europa.eu/news/19th-japan-eu-high-level-dialogue-environment-2023-01-23_en

⁴⁵ EU–Japan Centre for Industrial Cooperation, About us, 2023, <https://www.EU-JapanEU-Japan.eu/about-us>

⁴⁶ EU–Japan Centre for Industrial Cooperation, Big Green Opportunity for EU–Japan Industrial Cooperation, June 2021, <https://www.eu-japan.eu/june-2021-newsletter-2-vol-19#>

⁴⁷ CIRCABC, Trade relations, negotiations and agreements, 2023, https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/c9ef4d9b-6ee8-4a5f-aded-e1a0b55374c5?p=1&n=10&sort=modified_DESC

⁴⁸ Agreement between the European Community and the Government of Japan on cooperation in science and technology (6 April 2011): [https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A0406\(01\)](https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22011A0406(01)).

engagement to promote visibility of EU–Japan cooperation in this area.⁴⁹ A Letter of Intent signed in May 2020 further strengthened cooperation in this area, with addressing climate change again included as a priority.⁵⁰ In this respect, cooperation between Horizon Europe and Japan’s Moonshot research and development programme is a key component of this cooperation.

As for **sustainable finance**, the EU and Japan discuss it at the bilateral level at the EU–Japan Joint Financial Regulatory Forum, which was established after the EPA was signed. The forum is led by the Commission’s Directorate-General for Financial Stability, Financial Services and Capital Markets (DG FISMA) on the part of the EU, and the Financial Services of Japan (JFSA) on the part of Japan.⁵¹ Having said that, most cooperation in this area takes place within international frameworks, such as the G20 and the International Platform on Sustainable Finance (IPSF).⁵² The focus is on transition finance, taxonomy and disclosures, as well as environmental, social and corporate governance (ESG). Compared to the United States, access to capital and financing is more complex in both the EU and Japan. As two of the four biggest economies in the world, their position on sustainable finance will shape the global conversation. This explains why it makes sense to prioritise this area.

2.4 Cooperation on security and defence

For the longest time, cooperation on security and defence constituted a major blind spot in EU–Japan relations. Geographical distance, a limited security toolbox, as well as a lack of strategic clarity when it comes to dealing with China have traditionally put the EU at the very margins of Japan’s strategic thinking. Instead, most of Tokyo’s attention has been directed at nurturing its security alliance with Washington, which is vital to its national security interests. This trend has been shifting slowly since 2016, and (importantly) **accelerating in the context of Russia’s aggression against Ukraine**, which has been ongoing since February 2022. For one, the EU’s quick response and military assistance to Ukraine has made Japan realise the bloc is indeed more than just a civilian power and has the potential to act in times of crisis. Secondly, China’s support of Russia and the qualitative upgrade of Moscow–Beijing relations have made Europeans more aware of the potential threat that the Chinese communist regime poses in East Asia, be it in the Taiwan Strait or the East China Sea.⁵³ At the same time, Japan’s strong condemnation of Russia and proactive support for Ukraine have been received with much sympathy in Europe. As of July 2023, Japan has committed over EUR 6 billion EUR⁵⁴ in total bilateral assistance to Ukraine, aiming to ‘lead the world’s efforts’ in upholding a free and open international order.⁵⁵ Finally, Japan understands that strengthening defence cooperation with Europe also serves the interests of Washington, helping to alleviate the so-called

⁴⁹ European Commission, Research and Innovation – Japan (2023): https://research-and-innovation.ec.europa.eu/strategy/strategy-2020-2024/europe-world/international-cooperation/bilateral-cooperation-science-and-technology-agreements-non-eu-countries/japan_en.

⁵⁰ Letter of Intent on Strengthening Cooperation in Science, Technology and Innovation between the European Commission and the Cabinet Office of the Government of Japan (26 May 2021): https://research-and-innovation.ec.europa.eu/system/files/2021-04/ec_rtd_loi-eu-jp.pdf.

⁵¹ European Commission, EU–Japan joint financial regulatory forum (25 March 2022): https://finance.ec.europa.eu/publications/eu-japan-joint-financial-regulatory-forum_en.

⁵² European Commission, EU and Japan strengthen economic cooperation through High Level Dialogue (25 October 2022): https://policy.trade.ec.europa.eu/news/eu-and-japan-strengthen-economic-cooperation-through-high-level-dialogue-2022-10-25_en.

⁵³ Pejsova and Pajon, ‘Rapprochement in times of crisis: War in Ukraine and the EU – Japan Partnership’, CSDS Policy Brief (May 2022): https://brussels-school.be/sites/default/files/CSDS%20Policy%20brief_2209_2.pdf.

⁵⁴ Ukraine Support Tracker Data, IFW Kiel Institute for the World Economy, updated in September 2023, <https://www.ifw-kiel.de/publications/ukraine-support-tracker-data-20758/>.

⁵⁵ ‘Japan promises to ‘lead the world’ in fighting Russian aggression with \$5,5 billion in Ukraine aid’, Reuters (20 February 2023): <https://edition.cnn.com/2023/02/20/asia/japan-ukraine-war-aid-five-billion-intl-hnk/index.html>.

‘two front’ predicament.⁵⁶ Given the interconnectedness of the European and the Indo-Pacific security theatres, all US allies – be it across the Atlantic or the Eurasian landmass – need to invest in stepping up defence and interoperability in order to forge a united front against the rising tide of autocracy and revisionism.

While the war in Ukraine provided a sense of urgency into boosting security and defence ties, Japan and the EU have already been joining forces in less traditional security areas. Maritime security, cybersecurity, nuclear non-proliferation and crisis management have been at the forefront of bilateral cooperation with significant progress recorded, especially in the past five years.⁵⁷ Among those, most progress has been achieved in the field of **maritime security**. As per its geography, Japan is entirely dependent on the safety and security of its shipping lanes, which have contributed significantly to regional maritime security since the 1970s. The EU, on its part, is the world’s largest trading block that relies heavily on trade with East Asian countries, most of which is seaborne. The promotion of safety and freedom of navigation has been a central argument for the EU’s security engagement in the Indo-Pacific, with Japan as a main partner. Unsurprisingly, strengthening cooperation in maritime affairs is also a key priority under the SPA.

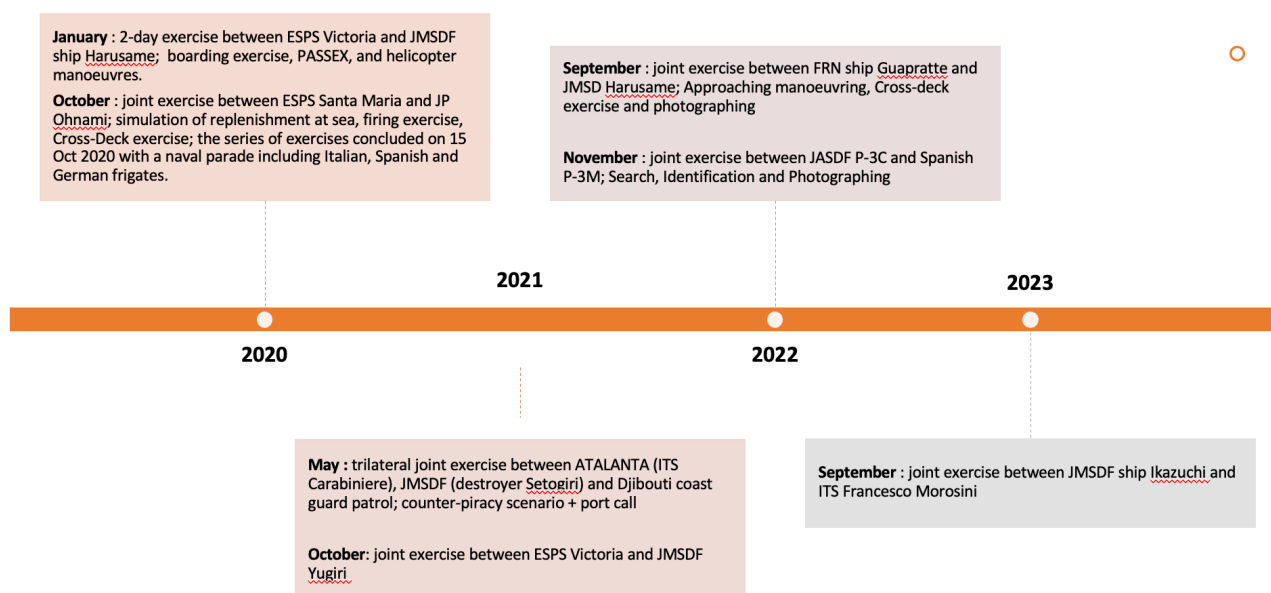
Joint naval exercises multiplied with the EU’s sole long-standing naval presence, the anti-piracy mission **EUNAVFOR ATALANTA**. Since the eruption of piracy in the Gulf of Aden in 2009, the Maritime Self-Defence Forces (JMSDF) have engaged in over 20 naval exercises with the EU, boosting interoperability between the two like-minded partners, with an acceleration of activity in the past four years (see details in Figure 1).⁵⁸ Years of successful cooperation on the ground in the context of the fight against piracy finally led to the signature of an ‘**Administrative Arrangement**’ between the JMSDF and EUNAVFOR ATALANTA on 15 March 2023, which establishes a common framework for communication and coordination for future joint naval operations.⁵⁹

⁵⁶ Simon, Fiott and Manea, ‘Two Fronts, One Goal: Euro-Atlantic Security in the Indo-Pacific Age’, Marathon Initiative (August 2023), <https://themarathoninitiative.org/wp-content/uploads/2023/08/Two-Fronts-One-Goal-website-publication-v.2.pdf>.

⁵⁷ See, for instance, Emil Kirchner and Han Dorussen, ‘New horizons in EU–Japan security cooperation’, *Asia-Europe Journal* (Vol 19, 2021): <https://link.springer.com/article/10.1007/s10308-020-00586-z>.

⁵⁸ Statement by Vice Admiral Saito Akira, Commander in Chief of the JSDF, during a visit of the EU NAVFOR ATALANTA Commander to Yokosuka on 16 March 2023: <https://www.mod.go.jp/msdf/sf/english/news/2023/03/0323-01.html>.

⁵⁹ EU NAVFOR, ‘Closer ties between EU NAVFOR and Japanese naval forces in the Indian Ocean’ (21 March 2023): <https://eunavfor.eu/news/closer-ties-between-eu-navfor-and-japanese-naval-forces-indian-ocean>.

Figure 1: Recent joint naval exercises between EUNAVFOR ATALANTA and the JMSDF

Source: Data combined from the EUNAVFOR ATALANTA newsletters and the Japanese Ministry of Defence (MOD) websites.

Beyond Atalanta, the EU's updated 2023 Maritime Security Strategy vows to continue cooperating with Japan in the form of joint exercises and port calls, and also considers the possibility of expanding its 'Coordinated Maritime Presence' in Maritime Areas of Interest further east, potentially including in the South China Sea.⁶⁰ The Joint Statement following the 2023 EU–Japan Summit highlights the potential of further cooperation between the two navies, including on 'joint exercises in the Indo-Pacific', stemming from successful and regular interaction within the framework of EUNAVFOR ATALANTA and the EU's Coordinated Maritime Presences (CMP) in the north-western Indian Ocean.⁶¹

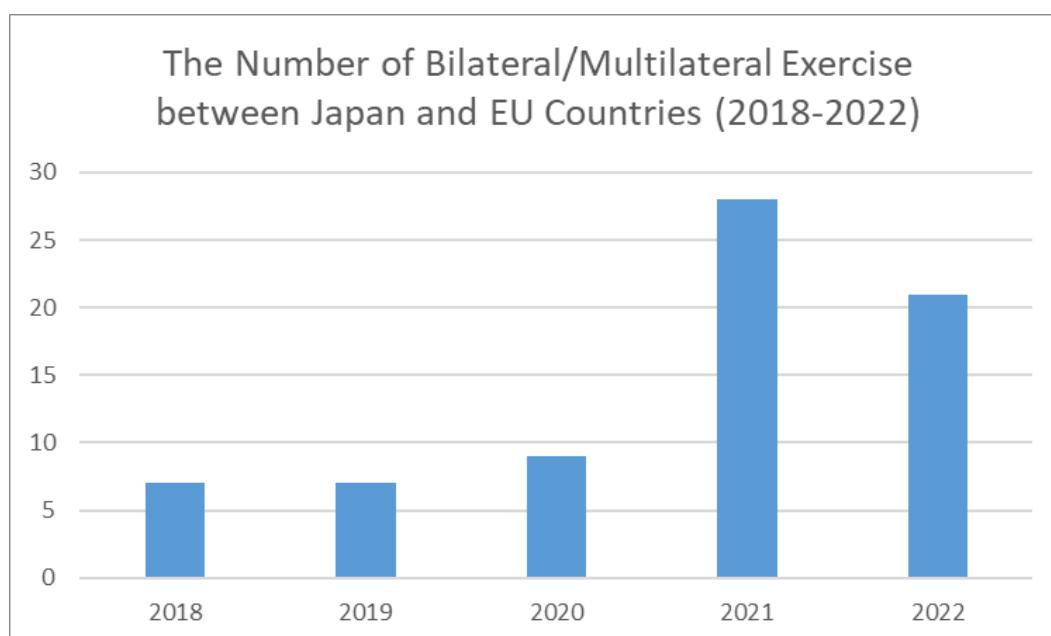
The increasing **naval presence of European Member States** in the Indo-Pacific in recent years (notably France, Germany, the Netherlands and Italy) has significantly contributed to raising awareness of Europe's determination to help support regional maritime security.⁶² The peak of such activities can be noted in 2021, which corresponds to the naval deployments of France, Germany and the Netherlands following the adoption of the EU's Indo-Pacific Strategy (see Figure 2). Albeit often perceived and treated separately from the EU, the EU Military Staff (EUMS) naval deployments provide the operational underpinning of the EU's narrative and engagement in the region and should not be underestimated. On the contrary, they contribute to raising awareness among partners of the EU's commitment to the region, which the EU can capitalise on.

⁶⁰ Pejsova, Eva, 'The EU's Maritime Ambitions in the Indo-Pacific', The Diplomat (14 March 2023): <https://thediplomat.com/2023/03/the-eus-maritime-ambitions-in-the-indo-pacific/>.

⁶¹ EU–Japan Joint statement: https://ec.europa.eu/commission/presscorner/detail/en/statement_23_3846.

⁶² Pejsova, Eva, 'The EU's naval presence in the Indo-Pacific: what is it worth?' in Paul Van Hooft (ed.), HCSS 'Europe in the Indo-Pacific Hub' Report (March 2023): <https://hcss.nl/report/the-eus-naval-presence-in-the-indo-pacific-what-is-it-worth/>.

Figure 2: Joint military exercises (air force and navy) between the Japan Self-Defense Forces (JSDF) and EU countries (2018–2022)



Source: Data combined from the websites of the Japan Ground Self-Defense Force, Japan Maritime Self-Defense Force, Japan Air Self-Defense Force, and Joint Staff.

Another prominent area of EU–Japan security cooperation has been **cybersecurity**. For the two highly digitalised economies, cyberattacks and other types of incursions, disruptions, or malign activities occurring in cyberspace and digital infrastructure have been a grave concern. Strongly committed to promoting free, open, and secure information space, boosting cyber security and resilience has been one of the key pillars of security cooperation mentioned in the SPA and further developed under the EU–Japan Digital Partnership. While Japan has been one of the leaders in ICT development and commercialisation since the 1980s, its cyber defence capabilities lag behind in comparison with other OECD countries.⁶³ In a new upgrade, the 2022 Japanese National Security Strategy includes provisions on the development of an ‘active cyber defence’ and information warfare posture as one of the key priorities for national security.⁶⁴

The two partners have been holding regular Cyber Dialogues since 2014, providing a venue for consultation and coordination of cybersecurity policies. Various cooperative initiatives have been put in place – notably under the Enhancing Security in and With Asia (ESIWA) project – focusing on policy dialogues and public outreach, HORIZON Europe, or the InDiCo project (ICT standardisation, Internet of Things).⁶⁵ In 2018, Japan and the EU agreed to mutual recognition of their respective data protection systems by the reciprocal adequacy agreement, creating the **largest digital data free trade zone** in the world.⁶⁶ Modelled on the EU’s Directive on security of network and information systems (NIS Directive), this could also include the US, and potentially India in the longer run.⁶⁷ In February 2021, the two partners agreed to deepen cooperation on platform regulation and industrial research, followed by a week-long

⁶³ ‘Cyber Capabilities and National Power: A Net Assessment’, IISS Research Paper (June 2021): <https://www.iiss.org/research-paper//2021/06/cyber-capabilities-national-power>.

⁶⁴ National Security Strategy of Japan (22 December 2022): <https://www.cas.go.jp/jp/siryou/221216anzenhoshou/nss-e.pdf>.

⁶⁵ The INDICO Project: <https://www.indico-ictstandards.eu/about-the-project>.

⁶⁶ Press release: ‘The European Union and Japan agreed to create the world’s largest area of safe data flows’ (17 July 2018): https://ec.europa.eu/commission/presscorner/detail/en/IP_18_4501.

⁶⁷ Meriadec Raffray, ‘Cybersecurity: Why Japan is eyeing Europe’, InCyber News (28 December 2022): <https://incyber.org/en/cybersecurity-why-japan-is-eyeing-europe/>.

series of joint cybersecurity training sessions, including with the United States.⁶⁸ Under the framework of the EU–Japan Digital Partnership, more cooperation is foreseen, notably in the domain of AI, IoT, quantum computing and digital infrastructure.

Arms control has also been among the other priority areas for enhanced bilateral security cooperation, including the non-proliferation of chemical, biological, radioactive, and nuclear (CBRN) weapons, which constitute a strong, long-standing common interest to both Tokyo and Brussels. Although for a long time mostly rhetoric, the issue of nuclear disarmament and non-proliferation has increased in importance in the context of Russia’s invasion of Ukraine, putting it among the top priorities for the G7 Hiroshima Summit in July 2023.⁶⁹

Finally, **crisis management** constitutes another important area of converging security interest to both the EU and Japan, two powers known for their attachment to peaceful resolution of disputes, active support of civilian agencies and actors in conflict areas, as well as involvement in post-conflict reconstruction. The EU’s approach to preventive diplomacy and crisis management (under the Common Security and Defence Policy (CSDP) framework) is increasingly being appreciated in Japan. The 2022 edition of the EU CSDP Handbook has been translated to Japanese for the first time, with the support of ESIWA.⁷⁰ The most successful example of cooperation in crisis management so far has been the aforementioned JMSDF interaction with the EU’s anti-piracy mission ATALANTA in the Arabian Sea. However, more potential avenues could follow, notably in Southeast Asia, Central Asia, Africa, or Ukraine in due time.

The decision to establish an annual **EU–Japan Strategic Dialogue** at the ministerial level, announced by the leaders as one of the outcomes of the bilateral summit in July 2023, is an important step in the right direction, highlighting the increasingly converging strategic outlooks. A security and defence dialogue at the level of managing directors and heads of divisions already takes place annually and is joined by the Schuman Security & Defence Forum 2023.⁷¹

2.5 Cooperation in multilateral fora

The EU and Japan are two of the strongest proponents of the existing multilateral liberal international order. Yet, cooperation in multilateral fora for a long time seemed to be secondary to their relationship, as these institutions functioned with little disruption and bilateral coordination was not necessarily urgent. This is not the case anymore, as the work of multilateral fora and the liberal international order at large are being challenged by countries with different values, such as China, Iran, North Korea or Russia. In the particular case of Beijing and Moscow, and especially the latter since its invasion of Ukraine, they have rendered the UN Security Council ineffective on major matters, since they can exercise veto power as two of their permanent members. Furthermore, the position of the US during the Trump administration also eroded multilateral fora, as most visibly demonstrated by Washington’s withdrawal from the Paris Agreement and its blocking of new judges to the World Trade Organization (WTO) Appellate Body. Even if the Biden administration has restored Washington’s commitment to multilateralism, it continues Trump’s

⁶⁸ ‘International cooperation: EU, Japan and US in joint cybersecurity training’ (15 March 2021): <https://digital-strategy.ec.europa.eu/en/news/international-cooperation-eu-japan-and-us-joint-cybersecurity-training>.

⁶⁹ ‘G7 Leaders’ Hiroshima Vision on Nuclear Disarmament’, The White House (19 May 2023): <https://www.whitehouse.gov/briefing-room/statements-releases/2023/05/19/g7-leaders-hiroshima-vision-on-nuclear-disarmament/>.

⁷⁰ Satoko Takahara, ‘Ukraine War and Japan–EU Cooperation on Crisis Management’ (31 March 2023): https://www.spf.org/en/spfnews/information/20230331_02.html.

⁷¹ EEAS, Schuman Security & Defence Forum 2023: <https://www.eeas.europa.eu/sites/default/files/documents/2023/Schuman-Security-Defence-Programme-1903-1925.pdf>.

policy towards the WTO. Thus, there are limits to the US's commitment to multilateral fora. This further underscores the need for the EU and Japan to cooperate in this type of manner.

Starting with multilateral fora with universal membership, or those that are at least in principle open to it, the **United Nations** is the main body. The EU and Japan have a good working relationship in the UN General Assembly. Most notably, they are coordinating the positions, actions and votes of EU Member States, Japan and other like-minded partners in relation to Russia's invasion of Ukraine. Japan holds a non-permanent seat at the UN Security Council in 2023–2024 and regularly successfully bids to hold such a seat.⁷² The EU and Japan also work together in the UNFCCC, to which both of them have shown a strong commitment over the years. This includes discussing, agreeing and promoting joint positions along with other like-minded partners. This is expected to be the case with the Global Biodiversity Framework, as well. As for the United Nations Human Rights Council, the EU helps coordinate the position of Member States, together with Japan and other like-minded partners, and drafts and presents resolutions during the Council's sessions. Brussels and Tokyo cooperate in this institution.⁷³ This includes sharing information and views and discussing draft position papers, as well as voting together on most issues. Within the UN system, the **International Atomic Energy Agency (IAEA)** is another organisation in which the EU and Japan work together closely. The EU's main focus is on developing cooperation policy around the issues of nuclear safety and nuclear security.⁷⁴ These are of great importance to Japan, which feels threatened by the nuclear programmes of North Korea, especially, and to an extent China. Besides the UN system, Brussels and Tokyo also work together closely in the **WTO**, an institution that both of them believe should still play an important role in managing global trade. Most recently, Japan joined the Multi-party Interim Appeal Arbitration Arrangement (MPIA) in March 2023.⁷⁵ The EU and other partners launched MPIA in April 2020 following the Trump administration's blocking of new judges to the WTO's Appellate body.⁷⁶

With regards to multilateral fora with restricted membership, the EU and Japan are founding members of the **G20** and have a strong working relationship therein.⁷⁷ This is an institution in which both of them regularly work together, along with other like-minded partners, to bring issues up to the table for discussion, inform the contents of joint statements, and support each other's initiatives. Even though the leaders' summit of the G20 has become more politicised in recent years, as seen in the September 2023 summit held in New Delhi, the group still serves to discuss economic, political and security issues, including via its specialised meetings. The **OECD** is another institution in which the EU and Japan work together, helping formulate the programme of work, discussing and coordinating positions in specialised committees, and monitoring policy implementation. As for the **Asia-Europe Meeting (ASEM)**, arguably it was growing in relevance, as multilateral fora have become embroiled in internal disputes.⁷⁸ The EU and Japan work together to support the summits and ministerial meetings, promote discussions and exchanges within working groups, and support its educational and cultural programmes. At the moment, Russia's membership of ASEM makes it difficult for the institution to work properly. However, the **Asia-**

⁷² Dag Hammarskjöld Library, UN Membership (2 October 2023): <https://research.un.org/en/unmembers/scmembers>.

⁷³ Delegation of the European Union to Japan, The European Union and Japan – Political Relations/Cultural and Public Diplomacy (17 February 2023): https://www.eeas.europa.eu/japan/european-union-and-japan-political-relations-cultural-public-diplomacy_en?s=169.

⁷⁴ IAEA, European Union (2023): <https://www.iaea.org/about/partnerships/european-union>.

⁷⁵ European Commission, 'EU welcomes Japan joining dispute settlement arrangement' (10 March 2023): https://policy.trade.ec.europa.eu/news/eu-welcomes-japan-joining-dispute-settlement-arrangement-2023-03-10_en.

⁷⁶ European Parliament, The European Union and the World Trade Organization (April 2023): https://www.europarl.europa.eu/erpl-app-public/factsheets/pdf/en/FTU_5.2.2.pdf.

⁷⁷ Delegation of the European Union to Japan, The European Union and Japan – Political Relations/Cultural and Public Diplomacy (17 February 2023): https://www.eeas.europa.eu/japan/european-union-and-japan-political-relations-cultural-public-diplomacy_en?s=169.

⁷⁸ EEAS, Asia-Europe Meeting (ASEM) (23 November 2021): https://www.eeas.europa.eu/eeas/asia-europe-meeting-asem_en.

Europe Foundation (ASEF) could be used by the EU and Japan to strengthen people-to-people links, together with students and professionals in third countries.⁷⁹ Plus, the Asia-Europe Parliamentary Partnership (ASEP) can boost ties between members of the European Parliament and their counterparts in Japan.⁸⁰ As for minilateral fora, the **G7** has become revitalised as an institution for its members to coordinate their policies and actions against China's aggressiveness and economic coercion, Russia's invasion of Ukraine, or North Korea's development of its nuclear and missiles programme. For the EU, this institution has become more important, as it is becoming a more prominent geopolitical actor. For Japan, this has always been a key institution, as its only Asian and non-Western member. As relations between G7 members and autocratic regimes continue to suffer, the G7 will continue to serve as a coordination platform.

2.6 Cooperation in other areas

EU–Japan cooperation is continuously expanding into new areas. Those covered in sections 2.1 to 2.5 are becoming increasingly well-established, and the two partners agree that cooperation in these areas is necessary. Thus, we can expect joint work on them to continue. Yet, there are other areas of cooperation between Brussels and Tokyo in which we should expect stronger links, with efforts to identify actions to develop in the short to medium term and build on the existing links between the two partners. Among these, two stand out, since they are of great interest to both the EU and Japan: governance of global commons, and promotion of physical and digital connectivity of third countries.

Starting with cooperation on the **governance of global commons**, the EU and Japan are seeking to boost ties in outer space and the deep-sea bed. With regards to outer space, the European Space Agency (ESA) and the Japan Aerospace Exploration Agency (JAXA) started working together in 1972. Throughout the decades, cooperation has expanded to include information and data exchange, Earth observation missions, or space exploration missions.⁸¹ The EU and Japan also have an EU–Japan Space Dialogue led by the Directorate-General for Defence Industry and Space (DEFIS) on the EU side, and METI on the Japanese side. On the sidelines of the most recent dialogue meeting in January 2023, the two sides signed a Copernicus Cooperation Arrangement to facilitate the sharing of Earth observation data between the Copernicus ecosystem and Japan's non-commercial Earth observation satellites.⁸² Considering that the space is becoming an area of competition between countries such as China and the United States, and that there are no effective international rules to govern its use, we can expect the EU and Japan to continue to deepen ties in this area, in cooperation with other like-minded partners.

The **deep seabed** is another global common in which we should expect growing cooperation between the EU and Japan. Both of them are members of the International Seabed Authority (ISA), but this organisation has proven unable to govern the use of the deep-sea bed. As deep-sea mining activity grows, multiple actors, including private companies, develop undersea infrastructure especially for data transfer, and different countries launch deep-sea military strategies, the two partners are engaged in discussions about how to boost links in this global common.⁸³ In July 2023, the EU and Japan held their first Digital Partnership Council meeting and signed a Memorandum of Cooperation to support secure, resilient and

⁷⁹ Asia-Europe Foundation (2022): <https://asef.org/>.

⁸⁰ European Parliament, 10th Asia-Europe Parliamentary Partnership Meeting (27–28 September 2018): <https://www.europarl.europa.eu/relnatparl/en/the-10th-asia-europe-parliamentary-partn/products-details/20210126CPU34776>.

⁸¹ Japan Aerospace Exploration Agency, International Cooperation, 2023: <https://global.jaxa.jp/activity/int/index.html>.

⁸² European Commission, New Copernicus Cooperation Arrangement between the Commission and Japan to boost exchange of Earth Observation data in areas of common interest, 17 January 2023, https://defence-industry-space.ec.europa.eu/new-copernicus-cooperation-arrangement-between-commission-and-japan-boost-exchange-earth-observation-2023-01-17_en

⁸³ Eva Pejsova, 'For a rules-based Governance of the Seas: A Leading Role for Japan and the EU?', 18 October 2022, https://www.office.kobe-u.ac.jp/ipiep/materials/EuropeanCenterSymposium2022/1-2_EvaPejsova.pdf

sustainable submarine cable connectivity.⁸⁴ The main focus is exploring the possibility of jointly developing a submarine cable via the Arctic, which would also mark the start of practical cooperation in this other global common.

As for cooperation in **promoting physical and digital connectivity of third countries**, the EU and Japan are committed to enhancing the connectivity and strengthening the resilience of actors in regions such as Southeast Asia, South Asia, Central Asia, the Pacific Islands and Africa. The EU–Japan Partnership on Sustainable Connectivity and Quality Infrastructure signed in September 2019 highlights four areas of connectivity cooperation, including in third countries: digital, transport, energy, and people-to-people exchanges. Key agencies involved in promoting connectivity include the European Investment Bank (EIB), the Japan International Cooperation Agency (JICA), the Japan Bank for International Cooperation (JBIC), and the Nippon Export and Investment Insurance (NEXI). The two sides acknowledge that cooperation in this area in third countries necessitates working together with the private sector.⁸⁵ The partnership shows the synergies between the EU’s EU-Asia Connectivity Strategy and Japan’s Free and Open Indo-Pacific (FOIP) strategy.⁸⁶ In addition, the EU’s Global Gateway also has a strong Indo-Pacific component. This includes flagship projects in South Asia, Southeast Asia and the Pacific Islands.⁸⁷ Thus, there are also synergies between the Global Gateway and Japan’s FOIP strategy. Brussels and Tokyo are yet to implement a connectivity project in a third country under this partnership, however, so it is ripe for cooperation.

3 Potential areas for deepening EU–Japan cooperation

3.1 Possibilities for increased cooperation on economic security

The vast area of economic security offers a plethora of theoretical opportunities for future cooperation, as underscored by the last EU–Japan Summit. The two partners are overall aligned in their approaches to supply chain security, anti-coercion, and technology transfer control. However, divergences remain, especially in the field of industrial policy. More importantly, it is the way both countries approach bridging national security interests with economic policies that needs to be addressed as an essential step to further cooperation.

An ideal first step would be to **harmonise their political, legal, and institutional approaches to economic security**. On the one hand, Japan has a comprehensive economic security policy embedded in its 2022 National Security Strategy, which links national security interests with economic policy.⁸⁸ Following its May 2022 ‘Act on the promotion of national security through integrated economic measures’, it clarifies that the government is allowed to provide subsidies to companies providing ‘strategically important goods’, intervene in stockpiling, and provide oversight in the installation of sensitive infrastructure through screening, among other concrete measures.⁸⁹ The list of strategically critical items includes semiconductors, but also batteries, rare-earth metals, LNG, fertilisers, industrial robots, and cloud

⁸⁴ European Commission, EU and Japan boost strategic cooperation on digital and on critical raw materials supply chains, 13 July 2023, https://ec.europa.eu/commission/presscorner/detail/en/ip_23_3831

⁸⁵ EEAS, The Partnership on Sustainable Connectivity and Quality Infrastructure between the European Union and Japan (27 September 2019): <https://www.eeas.europa.eu/eeas/partnership-sustainable-connectivity-and-quality-infrastructure-between-european-union-and-en>.

⁸⁶ Celine Pajon and Eva Pejsova, EU–Japan Relations: Moving Forward (25 May 2021): https://brussels-school.be/sites/default/files/CSDS%20Policy%20brief_2106.pdf.

⁸⁷ European Commission, Global Gateway – EU-Asia and the Pacific flagship projects of 2023 (March 2023): https://international-partnerships.ec.europa.eu/system/files/2023-05/Asia-Pac-flagship-projects-for-2023-v11_1.pdf.

⁸⁸ National Security Strategy of Japan (22 December 2022): <https://www.cas.go.jp/jp/siryoku/221216anzenhoshou/nss-e.pdf>.

⁸⁹ ‘Japan: New Act on the promotion of Japan’s economic security enacted’, Global Compliance News (10 July 2022): <https://www.globalcompliancencews.com/2022/07/10/new-act-on-the-promotion-of-japans-economic-security-enacted240622/>.

computing and ship-related equipment, which are all important for the island-state and have suffered from Chinese economic coercion in the past. Japan's comprehensive approach to economic security is also backed by an adequate institutional setup. In August 2022, Tokyo established a ministerial position for economic security, as well as a 'Council of Experts on Economic Security Legislation' in July 2022,⁹⁰ which oversees all major decisions in the domain and ensures a whole-of-government approach.

On the other hand, the **EU's approach to economic security is less advanced**. In terms of industrial policy, the EU remains cautious – and disunited – when it comes to measures that could be perceived as 'anti-market'.⁹¹ The area of semiconductor production, addressed in the EU 'Chips Act', is one noticeable exception, allowing allocation of state aid to sectoral industrial manufacturing. Apart from that, the Union's 'economic security toolbox' consists mainly of regulations on dual-use exports, investment screening, anti-subsidy, international procurement and anti-coercion instruments.⁹² Institutionally, the competences in the topics covered by economic security are spread among various bodies of the European Commission, with the EU Member States retaining most of the decisive power. This makes not only internal coordination, but also cooperation with partners like Japan, more complicated.

This raises the question of formats for cooperation. Currently, various aspects are discussed as part of the bilateral EPA, HLED and Digital Partnership. However, the possibility for a **trilateral discussion with the US** – either through the existing Transatlantic Trade and Technology Council (TTC) or a less formal consultative process – is not without merits, and should be further explored.⁹³ While both the EU and Japan share concerns related to US over-reach in the US–China trade competition,⁹⁴ the US is a necessary global player for regulating technology transfers. Both the EU and Japan have modelled parts of their economic security policies (such as export controls on specific technologies) on the US. Better and more institutionalised coordination among the three partners should help identify emerging technologies that feed into China's military-civil fusion and many other issues.⁹⁵

Cooperation on **critical raw materials** appears to be the next low(er) hanging fruit. Exploring opportunities within the Critical Raw Material Club, and bringing together consuming countries and resource-rich countries to diversify supply chain sourcing, was discussed at the last HLED in June 2023.⁹⁶ The new 'Administrative Arrangement on Critical Raw Materials Supply Chain' signed between the European Commission and the Japan Organization for Metal and Energy Security (JOGMEC) should allow for greater cooperation, information and experience sharing in supply chain risk management, innovation and recycling.⁹⁷ This is a promising way forward which could constitute the basis of a future **single supply chain resilience initiative** (bringing others under a single umbrella).⁹⁸

⁹⁰ Kana Itabashi et al., European Parliament, Japan's economic security legislation, EPRS 'At a Glance' (2023): [https://www.europarl.europa.eu/RegData/etudes/ATAG/2023/751417/EPRS_ATAG\(2023\)751417_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/ATAG/2023/751417/EPRS_ATAG(2023)751417_EN.pdf).

⁹¹ Mathieu Duchatel, 'Economic Security: A missing link in EU – Japan Cooperation', Institut Montaigne Policy Paper (April 2023): https://www.institutmontaigne.org/ressources/pdfs/publications/Institut_Montaigne_policy_paper_economic_security_the_missing_link_in_eu_japan_cooperation.pdf.

⁹² Ibid.

⁹³ Mathieu Duchatel, 'Technology transfers : the case for an EU–Japan–US cooperation framework', Institut Montaigne Policy Paper (April 2022): <https://www.institutmontaigne.org/ressources/pdfs/publications/europe-new-geopolitics-technology2.pdf>.

⁹⁴ Interview with a senior Japanese expert on economic security (28 September 2023).

⁹⁵ Mathieu Duchatel, 'Technology transfers: the case for an EU–Japan–US cooperation framework', Institut Montaigne Policy Paper (April 2022): <https://www.institutmontaigne.org/ressources/pdfs/publications/europe-new-geopolitics-technology2.pdf>.

⁹⁶ Press release, 'EU and Japan strengthen cooperation on digital trade and economic security' (27 June 2023): https://ec.europa.eu/commission/presscorner/detail/en/IP_23_3530.

⁹⁷ 'Enhancing cooperation with Japan on critical raw materials supply chain through a new Administrative Arrangement' (6 July 2023): https://single-market-economy.ec.europa.eu/news/enhancing-cooperation-japan-critical-raw-materials-supply-chains-through-new-administrative-2023-07-06_en.

⁹⁸ Yasuo Tanabe, 'Promote Multifaceted Japan–EU Cooperation on Supply Chain resilience', Seminar in Tokyo (4 July 2023): https://www.rieti.go.jp/en/columns/a01_0728.html.

Finally, there is scope for the EU and Japan to join forces to **promote economic security principles and governance globally**. The G7 can be a useful framework for such coordination. The Hiroshima summit has demonstrated Japan's leadership in this domain and the EU's strong support. Both partners share legitimate concerns with regards to the spreading economic and strategic influence of China (and Russia) in the so-called Global South. The implementation of their connectivity and digitalisation agendas could be accompanied by discussions with partners on transparency, fair business practices and anti-coercion measures in the form of economic security capacity building. In parallel, joint promotion of economic security rules and good practices can take place within regional and global multilateral frameworks, such as the OECD, Association of Southeast Asian Nations (ASEAN) Regional Forum (ARF), G20, or at the UN level.

3.2 Possibilities for increased cooperation on climate change and green transition

The need for increased cooperation between the EU and Japan in the area of climate change and green transition is unequivocal given the political, economic and security implications of climate change for both of them, as well as globally. In this respect, Brussels and Tokyo should utilise the Green Alliance so that it reaches its maximum potential as an anchor on which to base cooperation on issues linked to climate change and green transition. At the same time, climate change and green transition transcend any one country's policy or its bilateral relations. This is why the EU and Japan must step up their joint efforts to lead the conversation and the actions necessary to mitigate and (hopefully) reverse climate change and achieve green transition.

Starting with the **energy transition and environmental protection**, the EU and Japan should ensure that their strategies to deal with climate change and green transition produce synergies with each other. The EU's Climate Change Adaptation Strategy (February 2021)⁹⁹ and European Green Deal (December 2019)¹⁰⁰ set up ambitious sustainability goals and standards in sectors including energy, food and agriculture, transport, industry, and finance. They also emphasise the importance of technology to achieve climate neutral economies, including the use of renewable energy, carbon capture and recycling technologies. Likewise, Japan's Roadmap to Beyond-Zero emphasises these same goals, standards and solutions.¹⁰¹ In addition, the EU and Japan can prioritise joint **research and development** between their public and private sectors. Other than the agreements listed in section 2.3, a rapid conclusion of Japan's Horizon Europe association deal would signal commitment to upgrading their bilateral research and innovation links.¹⁰² Furthermore, both the EU and Japan emphasise localised approaches to encourage climate change mitigation and reversal, as well as green transition. Both sides should facilitate regular dialogue between city and regional governments, as well as other institutions, such as universities, research centres and private firms, to promote information exchange. The EU–Japan Centre for Industrial Cooperation could play a role in this dialogue.

Promoting and supporting **energy transition, environmental protection and sustainable finance in third countries** is another area in which the EU and Japan could take their relationship to the next level. The European Fund for Sustainable Development Plus (EFSD+) was set up to foster renewable energy and

⁹⁹ European Commission, 'Forging a climate-resilient Europe – The new EU Strategy on Adaptation to Climate Change' (24 February 2021): <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021DC0082>.

¹⁰⁰ European Commission, A European Green Deal (2023): https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en.

¹⁰¹ METI, Japan's Roadmap to 'Beyond-Zero' Carbon, https://www.meti.go.jp/english/policy/energy_environment/global_warming/roadmap.

¹⁰² European Commission, 'The EU and Japan open Horizon Europe association talks' (12 May 2022): https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/eu-and-japan-open-horizon-europe-association-talks-2022-05-12_en.

sustainable agriculture, as well as to strengthen public and private infrastructure, among other goals. It should work together with Japan's similar mechanisms, when possible, including the Joint Crediting Mechanism (JCM)¹⁰³ and the Asia Energy Transition Initiative (AETI).¹⁰⁴ Furthermore, the EU and Japan should engage in joint capacity building and training exercises. In this respect, Japan prioritises the Asia Carbon Capture, Utilisation and Storage (CCUS) Network in Southeast Asia and South Asia. The network includes non-Asian members, such as Australia and the United States, so the EU could seek to become a member as well.¹⁰⁵

Moving to the multilateral level, the EU and its Member States, as well as Japan, are among the largest contributors to the Green Climate Fund (GFC), which was established in 2010 under the framework of the UNFCCC. This support should continue, with the EU and Japan leveraging their financial contributions to accelerate the energy transition and environmental protection.

The EU and Japan should also work together with other partners to ensure that international agreements supporting the **energy transition**, **environmental protection** and **sustainable finance** are upheld and implemented. In particular, the Paris Agreement, and more recently, the Global Biodiversity Framework, provide a blueprint to promote the first two, while the G20 and the IPSF are emerging as platforms to promote the third. Some of the largest polluters, such as China, India, Russia or the United States, have a mixed track record in their support and implementation for these agreements. The EU and Japan, along with other partners such as Australia, Canada, Norway, South Korea or the UK, have a stronger track record in supporting multilateral agreements related to climate change and green transition. Brussels and Tokyo should work with these partners to ensure that the multilateral agreements underpinning cooperation at the global level continue to be implemented.

3.3 Possibilities for increased cooperation on security and defence

Within the field of security and defence, the most prospective area for future collaboration lays in boosting **defence technology transfers**.¹⁰⁶ The need to boost cooperation in defence technology transfers between the Japan and the EU has become more apparent in the context of Russia's invasion of Ukraine, which triggered European countries and US allies in Asia to tighten ranks and step up their defence. Japan's ambitious plan to double its defence budget, announced in the 2022 National Security Strategy (NSS), relies partly on boosting its defence exports. While both the EU and Japan largely depend on defence procurements from the US, they are also seeking to diversify partners and maintain their technological edge and competitiveness. Although Japan already relaxed its legislation on exports of defensive technologies in 2015, it is still subject to strict limitations (preventing it from exporting to countries at war, among others).

Japan's emerging defence industry still struggles to convince international partners, especially outside the United States. One noticeable exception within the European context has been the '**Global Combat Air Programme**' (GCAP) led by Japan (Mitsubishi), the UK (BAE Systems) and Italy (Leonardo) and agreed in December 2022. The programme aims to develop a new generation of stealth fighter jets to replace the Japan Air Self-Defense Force (JASDF) fleet by 2035.¹⁰⁷ Japan also has bilateral agreements on the transfer

¹⁰³ Ministry of Foreign Affairs of Japan, Joint Crediting Mechanism (JCM) (10 July 2023):

https://www.mofa.go.jp/ic/ch/page1we_000105.html#:~:text=The%20JCM%20is%20a%20system,both%20partner%20countries%20and%20Japan.

¹⁰⁴ METI, 'Minister Kajiyama announced the Asia Energy Transition Initiative (AETI)' (28 May 2021):

https://www.meti.go.jp/english/press/2021/0528_002.html.

¹⁰⁵ Asia CCUS Network: <https://www.asiaccusnetwork-eria.org/>.

¹⁰⁶ Interview with a senior EU official (29 September 2023).

¹⁰⁷ Global Combat Air Programme (GCAP), <https://www.baesystems.com/en-ja/product/global-combat-air-programme>.

of defence technology and equipment with France, Germany and Italy, which can be built upon. A case-by-case involvement of like-minded third (non-EU) countries in the EU's defence programmes and instruments, such as Permanent Structured Cooperation (PESCO) and the European Defence Fund (EDF), is stipulated in the 2022 Strategic Compass and has been welcomed by the European Parliament.¹⁰⁸ Joining forces on research and development (R&D) in defence technology and capabilities, AI and CBRN appears to be common sense. Japan's experience and technology for the detection of chemical and biological threats can also be useful in the European context.¹⁰⁹

Joint capacity building with third countries, especially in the field of maritime security (with Eastern African countries and in Southeast Asia), also constitutes a promising way forward. The EU and Japan have already been discussing cooperation on MDA through the EU's Critical Maritime Routes Indo-Pacific (CRIMARIO) initiative in Southeast Asia, be it with individual countries or within ASEAN.¹¹⁰ The EU's long-term political goal of getting Tokyo onboard its crisis management efforts under the **Framework Participation Agreement** (FPA) may not happen overnight, but small, sectoral cooperation may help convince Japanese counterparts of the EU's worthiness as a security partner.

In that context, **Japan's rapprochement with NATO can be instrumental for boosting defence cooperation with the EU.** Japan has been NATO's longest out-of-theatre partner and has been contributing to reconstruction efforts and activities since the 1990s (in the Balkans, and later in Afghanistan and Iraq). NATO's shifting attention to China and Japan's shifting policy on Russia -post Ukraine has brought the two closer together, opening a new phase in the relationship under the Individual Tailored Partnership Programme (ITPP), which seeks to expand collaboration in defence and technology R&D, hybrid threats and cybersecurity.¹¹¹ Although NATO is often dissociated from the debate on EU–Japan security cooperation, from Japan's perspective, both can be seen as mutually reinforcing and of great overall value for advancing Japan's strategic objectives.¹¹² To be sure, the war in Ukraine, the EU's stronger stance on China, and the ever-closer coordination between the EU and the US under the Biden administration have put Europe firmly on Japan's strategic radar. While NATO's closer engagement in Japan is still somehow controversial, as shown by France's opposition to the establishment of the Liaison Office in Tokyo¹¹³, the support of EU Member States to greater EU-Japan security and defence cooperation is unanimous.

3.4 Possibilities for increased cooperation in multilateral fora

The future of multilateralism and multilateral fora is under threat due to the great power competition between the US and China, Russia's invasion of Ukraine, and the perception of many countries that they are underrepresented in existing fora. None of these conditions are likely to change any time soon. Thus, the EU and Japan should adapt to this reality and find ways to continue to uphold multilateralism while making use of the minilateral fora that increasingly dominate decision making. This is especially the case

¹⁰⁸ European Parliament resolution of 17 February 2022 on the implementation of the Common Security and Defence Policy – Annual report 2021: https://www.europarl.europa.eu/doceo/document/TA-9-2022-0040_EN.html

¹⁰⁹ Yoshiyuki Sagara, 'Japan has plenty to offer in the field of detecting threats', The Japan Times (8 September 2023): <https://www.japantimes.co.jp/commentary/2023/09/07/japan/sensing-technology-spotlight/>.

¹¹⁰ Interview with a senior Japanese diplomat (5 September 2023).

¹¹¹ NATO (2023), 'Individually Tailored Partnership Programme between NATO and Japan for 2023–2026': https://www.nato.int/cps/en/natohq/official_texts_217797.htm?selectedLocale=en.

¹¹² Tsuruoka Michito, 'Japan–Europe Security cooperation: How to 'use' NATO and the EU', NIDS Bulletin (2011): http://www.nids.mod.go.jp/english/publication/kiyo/pdf/2011/bulletin_e2011_3.pdf.

¹¹³ "NATO appears to shelve plans to open Japan liaison office in Tokyo", <https://www.theguardian.com/world/2023/jul/12/nato-appears-to-shelve-plans-open-japan-liaison-office-tokyo>

for coalitions of like-minded partners working together on a variety of global issues in which they share interests and goals.

In the case of the **United Nations** and the **WTO**, the EU and Japan should work together, along with like-minded partners, to present initiatives and politics that may be able to attract other parties. The cases of the EU's leading role in votes by the UN General Assembly condemning Russia's invasion of Ukraine¹¹⁴ and North Korean human rights abuses, UN Human Rights Council votes on a range of matters (including China's alleged abuses in the Xinjiang Uyghur Autonomous Region), the setting up of the WTO's MPIA,¹¹⁵ or the launch of WTO disputes are all examples of the utility that these institutions retain. The EU and Japan agree and already cooperate on multiple matters of economic security, climate change, green transition, and security and defence, as laid out in section 2. Thus, they should increase the number of instances in which they bring these to multilateral fora.

As for the **G20**, while it is true that it has become another institution in which great power rivalry is being played out, the EU and Japan can work together with partners and interested parties on pressing ahead with some of the goals that the group, plus the closely aligned **Financial Stability Board**, are tasked with. These include discussion of climate change mitigation, promotion of sustainable development, financial sector risk assessment and reform, financial sector supervisory and regulatory cooperation, standards implementation, and discussion of sustainable finance.¹¹⁶ In other words, the G20 can still serve as a forum in which to present, discuss and express the will to cooperate in areas where most members of the international community share interests. The EU and Japan could work together to rally said cooperation.

Having said that, arguably it is the **G7** forum where the EU and Japan can boost their ties, since the organisation comprises like-minded partners with shared values and similar goals and interests. The G7 is serving as a forum for its members to coordinate actions such as policies, condemnations and sanctions, among others, which help their countries to advance their interests. Often, these actions are also discussed with other partners, such as Australia, the Netherlands, South Korea or Spain. In this way, the G7 is becoming the epicentre of a network of democracies to coordinate their diplomatic and economic actions, including vis-à-vis third parties. The EU and Japan could also lead discussions about the formal enlargement of the G7 into a G7+ or D9/D10, including Australia, South Korea, and potentially India.¹¹⁷

The EU and Japan should also consider ways in which they could work together with **NATO**,¹¹⁸ the **US-Japan-South Korea Trilateral**¹¹⁹, and even the **Quad**¹²⁰ to coordinate security policy. Even though the EU is a long way from becoming a security institution, NATO, the Trilateral, and the Quad have a wide-ranging understanding of security, including in areas where the EU has a mandate to act (economic security, new technologies, non-proliferation of CBRN weapons and cybersecurity). NATO and the Trilateral, in particular, include close EU partners and allies. In fact, the EU is already replicating the NATO-AP4 framework to discuss security matters. Namely, the AP4 refers to Australia, Japan, New Zealand and South Korea.

¹¹⁴ "EU on the General Assembly vote on Ukraine", <https://www.youtube.com/watch?v=FuWc58l3mwQ>

¹¹⁵ "The WTO multi-party interim appeal arrangement gets operational", https://www.eeas.europa.eu/delegations/world-trade-organization-wto/wto-multi-party-interim-appeal-arrangement-gets-operational_en?s=69

¹¹⁶ G20, 'About G20' (2023): <https://www.g20.org/en/about-the-g20>; Financial Stability Board, 'About the FSB'

(16 November 2020): <https://www.fsb.org/about/>.

¹¹⁷ Atlantic Council, D-10 Strategy Forum (2023): <https://www.atlanticcouncil.org/programs/scowcroft-center-for-strategy-and-security/global-strategy-initiative/democratic-order-initiative/d-10-strategy-forum/>; Erik Brattberg and Ben Judah, 'Forget the G-7, Build the D-10' (10 June 2020): <https://carnegieendowment.org/2020/06/10/forget-g-7-build-d-10-pub-82062>; G. John Ikenberry, 'The G-7 Becomes a Power Player' (31 August 2023): [The G-7 'Club of Democracies' Becomes a Power Player](https://foreignpolicy.com/article/the-g-7-club-of-democracies-becomes-a-power-player) (foreignpolicy.com).

¹¹⁸ NATO, Relations with Japan (28 July 2023): https://www.nato.int/cps/en/natohq/topics_50336.htm.

¹¹⁹ 'The Spirit of Camp David: Joint Statement of Japan, the Republic of Korea, and the United States' (18 August 2023): <https://www.whitehouse.gov/briefing-room/statements-releases/2023/08/18/the-spirit-of-camp-david-joint-statement-of-japan-the-republic-of-korea-and-the-united-states/>.

¹²⁰ Department of Foreign Affairs and Trade of Australia, The Quad (2023): <https://www.dfat.gov.au/international-relations/regional-architecture/quad>.

Considering that the EU and NATO are also strengthening their ties, EU–NATO–AP4 meetings would be a natural next step.

3.5 Possibilities for increased cooperation in other areas

Cooperation between the EU and Japan in other areas should focus on the governance of global commons and promoting physical and digital connectivity of third countries. When it comes to cooperation on the **governance of global commons**, budgetary constraints make collaboration not only desirable, but necessary. New joint missions, deepening and expanding information sharing, and joint research and development should be top priorities. This is yet another reason why Japan's Horizon Europe association status should be accelerated. In addition, the EU and Japan should explore stronger ties with Australia, South Korea and (above all) the United States to share costs, expertise and technology.

In addition, both the EU and Japan are increasingly wary of the militarisation or **weaponisation of space**. China and Russia have been dramatically increasing their operational satellite fleets and developing their counter-space technology (including missiles) in recent years, and want to deploy jammers in space to disrupt communications. Moreover, both of them are working together to counter what they consider to be US dominance in the space.¹²¹ In and by themselves, the EU and Japan cannot counter Sino-Russian cooperation, given budgetary and technological constraints. But they can work together with others to counter Beijing and Moscow – most notably the United States, but also Australia or South Korea.

Moving on to the **deep-sea bed**, the Digital Partnership should be utilised to ensure that the development of a submarine cable via the Arctic indeed goes ahead. This should also be of interest to other partners, including South Korea, Taiwan or the United States, so it would be advisable to include them in the project. In addition, the EU and Japan should explore the possibility of working together on deep-sea mining activity. This directly relates to retrieving minerals and deposits that can be used to strengthen supply chain resilience, support the energy transition, and reduce dependence on China in this area. Cooperation between the EU and Japan, as well as other partners with an interest in this activity, including Norway, South Korea, the United Kingdom, or the United States, should focus on its regulation to begin with. Indeed, some EU Member States, including France, Germany, Portugal, Spain and Sweden, have asked for a moratorium or precautionary pause to this activity.¹²² The ISA is currently debating this issue, and in theory should be the ultimate arbiter on whether or not the activity can go ahead.

When it comes to **promoting physical and digital connectivity of third countries**, the EU and Japan should prioritise launching a project under the aegis of their Partnership on Sustainable Connectivity and Quality Infrastructure. More than four years after the partnership was agreed, no project has been launched, even when the EU's Global Gateway has already led to several projects in the Indo-Pacific region. Launching the first project would signal the political commitment of the two partners in this area. To this end, the EU should focus on encouraging the EIB and EFSD+ to actively pursue partnership opportunities with their Japanese counterparts, as well as with similar agencies at the multilateral level or from like-minded countries, if necessary. In the meantime, the EU and Japan should also explore training and capacity building opportunities of third country experts and officials. So far, these joint activities have been limited.

¹²¹ Jack Detsch and Robbie Gramer, 'China and Russia are Catching Up to U.S. in Space Capabilities, Pentagon Warns' (14 April 2022): <https://foreignpolicy.com/2022/04/14/china-russia-us-space-race-catching-up/>.

¹²² Angela Symons, Deep Sea Conservation Coalition, 'Deep sea mining: Here's which countries oppose and support the controversial practice', *Resistance to Deep-Sea Mining: Governments and Parliamentarians* (2 August 2023): <https://www.euronews.com/green/2023/08/02/deep-sea-mining-heres-which-countries-oppose-and-support-the-controversial-practice#:~:text=Brazil%2C%20Canada%2C%20Costa%20Rica%2C,licences%20for%20deep%20sea%20mining>. See also, <https://www.euronews.com/my-europe/2023/09/01/deep-sea-mining-can-yield-many-riches-the-eu-is-against-but-its-neighbours-are-keen>

3.6 Conclusions

The EU needs to **prioritise strengthening its relations and cooperation with Japan**. As a G7 and G20 member with similar goals and interests, strong capabilities and shared values, Japan is an optimal partner for the EU. In fact, in recent years, as a result of China's growing assertiveness, the Trump presidency, US–China competition, and Russia's invasion of Ukraine, Japan has changed its perception of the EU as a security, diplomatic and economic partner. The new, more unstable and confrontational global geopolitics mean that the relationship between the EU and Japan is ripe for deeper cooperation, with the latter clearly prioritising relations with the EU and Europe in order to navigate the more complex international environment.

Starting with economic security, **the EU and Japan share an interest in maintaining a rules-based multilateral trading system**, while acknowledging that there is a need for state intervention and (if necessary) protectionism in certain high-tech sectors. The EU and Japan can work together to introduce measures that will ensure that they can compete against third parties that are not playing by existing rules. They can also cooperate to develop new technologies and supply chains, as well as to introduce rules and regulations with the potential to become universal. This can be done together with other like-minded partners that share their concerns about the need for a level global playing field.

Moving on to climate change and green transition, **the EU and Japan are at the forefront of international efforts to mitigate and reverse the negative effects of climate change**, while ensuring that green, more sustainable economic growth takes hold. Climate change and green transition require universal cooperation, especially within the UNFCCC framework. Otherwise, it will not be possible to tackle man-made natural disasters, extreme weather events, and other conditions related to climate change. In particular, the EU and Japan can take a leading role in ensuring that multilateral solutions to climate change are implemented and that green transition takes place as agreed. Working together with partners and other countries, Brussels and Tokyo can help provide this universal public good.

Continuing with security and defence, the EU and Japan have only recently realised the importance of bilateral cooperation. Yet, this is an area in which both of them see great potential for joint work, whether it is on cyber security, maritime security, or other security areas. From Japan's perspective, there is a degree of overlap in terms of cooperation between the EU, EU Member States and NATO. But this should not hinder security cooperation between Brussels and Tokyo. On the contrary, **as the EU and its Member States increase their presence in the Indo-Pacific, work with partners to support Ukraine and, more generally, to carve a new security role at the global level, are growing**. This can open up new opportunities for cooperation with Japan.

Now focusing on multilateral fora, **the EU and Japan believe in the importance of the UN framework to govern global politics and should continue to support it**. At the same time, other organisations, such as the G7, the G20, the OECD or ASEM, are relevant to EU–Japan relations, along with minilaterals including the US–Japan–South Korea Trilateral or the Quad. NATO is also becoming increasingly relevant. The EU needs to understand this new reality and decide which fora are more relevant to work, together with Japan, depending on the issue.

Finally, **the EU should also explore cooperation with Japan in new areas, most notably the governance of global commons and promoting the physical and digital connectivity of third countries**. Potential cooperation in these two areas underscores that EU–Japan links are constantly expanding and are not only for their benefit, but for the benefit of third countries as well. This way, the EU can utilise its relationship with Japan not only to enhance its own security and boost ties with a close partner, but also to strengthen its position vis-à-vis other countries as well.

4 Recommendations

4.1 Recommendations to the European Parliament

1. Led by the European Parliament's Committee on Foreign Affairs (AFET) and the Delegation for Relations with Japan, **continue inter-parliamentary diplomacy** by engaging in regular consultations and visits with the National Diet of Japan, taking a holistic approach covering politics, security and economics to reflect the deepening bilateral EU–Japan relationship and avoiding the previous narrow focus on economic matters.
2. Led by AFET and the Delegation for Relations with Japan, **continue to monitor that the Commission-led strategic dialogues and sectoral dialogues are held at regular intervals**, focus on the priorities of the EU, and serve to consolidate and strengthen the bilateral relationship between the EU and Japan.

4.2 Recommendations to other EU institutions

Recommendations to all institutions

1. Boost **cooperation with Japan and other like-minded partners**, including but not limited to Australia, Canada, New Zealand, Norway, South Korea, Switzerland, the United Kingdom and the United States. Deepening EU–Japan ties should go hand in hand with nurturing relations with other partners that share their liberal values and commitment to a rules-based international order. Considering the challenge from authoritarian regimes including China, Iran, North Korea and Russia, working together with like-minded partners is crucial for the EU and Japan to promote their shared interests.
2. Boost **knowledge inside the EU about the national politics and other internal dynamics in Japan**. Compared to other countries such as China and the United States, or European partners including Norway, Switzerland and the United Kingdom, knowledge about domestic affairs and different internal political, economic and security currents in Japan is limited in the EU. This constrains the EU's ability to understand how to interact with different stakeholders in Japan, including following a change in government.
3. **Bolster knowledge about the EU in Japan**. Japan's leadership, diplomatic circles, but also scholarship still lacks sufficient awareness about the functioning of the European Union. The focus on the United States is still largely at the top of Japan's priorities, relegating Europe (but also Africa and other more distant geographical areas) to secondary positions. Bridging this gap is essential to further promote constructive EU–Japan ties by increasing interest in and understanding of what the EU is, what it does, how it works, and how it can cooperate with Japan.
4. Ensure that **Japanese views are taken into consideration** when discussing, processing, and implementing new policies and legislation. The EU's actions and policies have a direct impact on partners, and Japan is no exception. The EU can prevent unnecessary political and diplomatic disputes with Japan by ensuring that existing dialogues and ad hoc exchanges are used to explain decisions and, when appropriate, to consider the positions of this partner.

4.3 Recommendations to the European Commission

1. Establish a **single coordinating entity for economic security**. Given the deeply cross-cutting nature and the rising importance of the issue for the EU, the Commission should ensure appropriate coordination of the various areas currently covered by different DGs (TRADE, GROW, CONNECT, DEFIS, etc.), as well as the European External Action Service (EEAS). A nomination of an **Ambassador-at-large**

for Economic Security could facilitate representation, as well as improve communication with partners such as Japan.

2. Determine the **priority areas for cooperation under the Green Alliance**. The alliance highlights five priority fields for cooperation. Budgetary constraints and human resources limitations mandate that the Commission is going to have to decide which of these to prioritise in the short term and which ones to pursue in the long term. Arguably, energy transition and environmental protection are greater priorities and should be prioritised first.
3. Continue to provide **support to the UN system, including UNFCCC, IAEA and the WTO**, in cooperation with like-minded countries. These institutions have successfully underpinned multilateral cooperation for decades. Even if currently being challenged, continuing to support them serves the interests of the EU and Japan, and signals that the two partners will work together to uphold the multilateral rules-based international order.
4. Continue to **expand the scope of the remit and actions of the G7 or G7+**, acknowledging the limitations of multilateral institutions under the current global geopolitics. G7 members continue to hold formidable economic capabilities and boast considerable politico-diplomatic power. They can thus seek to shape global politics and the actions of third parties when their interests and actions align.
5. Explore the possibility of **boosting EU–NATO–Japan/AP4 security cooperation**, as NATO–AP4 ties continue to deepen following the Madrid and Vilnius summits. From the perspective of Japan, NATO is becoming an increasingly important security partner in the Indo-Pacific and globally. In consideration of growing EU–NATO ties and the considerable overlap between EU and NATO memberships, the EU should seek ways to boost security cooperation with Japan, together with NATO.
6. Continue to boost cooperation in the **governance of the global commons**, as exemplified by the Copernicus Cooperation Arrangement signed in 2023 or the exploration of the potential development of a sea cable via the Arctic. Capacity and budgetary constraints dictate that the EU is going to have to increase cooperation with partners in the governance of the global commons. Japan should be prioritised as a partner, given its capabilities, as well as shared interests and values with the EU.
7. Decide on the **implementation or the reassessment of the Partnership on Sustainable Connectivity and Quality Infrastructure**, also in the context of the launch of the first projects under the Global Gateway. The lack of any tangible outcome since the partnership was launched in 2019 is a source of tension between the EU and Japan (and within the EU), in a relationship that otherwise does not have significant friction points. It is necessary for the EU to reach a decision on its level of commitment to this initiative.

5 Annexes

List of interviews

We acknowledge with gratitude interviewees for sharing their insights. For the record, we note the position of the interviewee and the date of each online conversation. Interviewees remain anonymous due to their request for confidentiality to discuss EU, Japan and EU–Japan affairs freely. None of the below are responsible for the analysis presented in this study.

1. Interview with EEAS official 1, Brussels, 26/09/2023
2. Interview with EEAS official 2, Brussels, 26/09/2023
3. Interview with a former EEAS official, Brussels, 28/09/2023
4. Interview with EEAS official 3, Brussels, 02/10/2013
5. Interview with a senior Japanese diplomat (MOFA), Brussels, 05/09/2023
6. Interview with a senior Japanese expert and national security advisor, Brussels, 05/09/2023
7. Interview with a senior Japanese expert on economic security, Paris, 11/09/2023
8. Interview with a Japanese security and defence expert, virtual/online, 18/09/2023
9. Interview with a Japanese expert on digital, virtual/online, 18/09/2023

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