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INSIGHT

Divergence of
Transatlantic
Partners in
Perceptions and
Policies Toward
China

Mehmet Fatih Ceylan
Ece Şölendil

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Mehmet Fatih Ceylan, *Ambassador (R.), President of the Turkish Atlantic Council Association and Ankara Policy Center*

Ece Şölendil, *Ph.D. Candidate, University of Edinburgh*

Abstract

Europe is neither fully converging with U.S.-led containment efforts nor accommodating China's expanding influence. Instead, it is adopting a strategy that combines selective alignment with the United States, continued but cautious economic engagement with China, and a gradual diversification toward Indo-Pacific partners. This posture places Europe at the center of a more complex triangular dynamic, where U.S. pressure, China's leverage, and wider systemic shifts intersect. This study examines how transatlantic partners are diverging in their perceptions and policies toward China, and what this means for the relationship between Euro-Atlantic and Indo-Pacific security architectures. Focusing on the period from the late 2010s through the mid-2020s, a phase marked by intensifying U.S.–China rivalry, Russia's invasion of Ukraine, and shifting U.S. strategic priorities, the analysis seeks to unpack the drivers of Europe's more calibrated approach.

Introduction

The intensifying geopolitical chess match between the United States and China is reshaping both the Euro-Atlantic and Asia-Pacific strategic landscapes, with increasingly interconnected consequences. Washington's hardline yet at times transactional approach to Beijing's growing military, technological, and geopolitical influence, particularly in light of China's support for Russia and its expanding global reach, has exposed underlying differences among U.S. allies. European actors, shaped by distinct economic interests, political constraints, and strategic cultures, have not uniformly aligned with Washington's approach.

As a result, Europe is neither fully converging with U.S.-led containment efforts nor accommodating China's expanding influence. Instead, it is adopting a strategy that combines selective alignment with the United States, continued but cautious economic engagement with China, and a gradual diversification toward Indo-Pacific partners. This posture places Europe at the center of a more complex triangular dynamic, where U.S. pressure, China's leverage, and wider systemic shifts intersect.

This emerging configuration is redefining the relationship between Euro-Atlantic and Asia-Pacific security. One of the most visible manifestations of this shift is the deepening, though uneven, proximity between Europe and China. As strategic competition intensifies and traditional alignments become less predictable, the need for a more flexible and multi-layered approach to managing these interlinked spheres becomes increasingly apparent.

In this context, this study examines how transatlantic partners are diverging in their perceptions and policies toward China, and what this means for the relationship between Euro-Atlantic and Indo-Pacific security architectures. Focusing on the period from the late 2010s through the mid-2020s, a phase marked by intensifying U.S.–China rivalry, Russia's invasion of Ukraine, and shifting U.S. strategic priorities, the analysis seeks to unpack the drivers of Europe's more calibrated approach.

The Emerging Europe–China Proximity

At different intervals and somewhat ambiguously, Washington has framed Beijing as its primary systemic rival and has embraced an overt containment strategy. The Trump administration's confrontational policies have inadvertently pushed European powers and China into deeper economic, diplomatic, and, at times, strategic proximity. The implications of this remain insufficiently recognized in Washington.

Evidence for this deepening proximity is significant. European manufacturers continue to expand investment in China despite rising political anxiety about industrial dependence. Structural incentives reinforce this trend: decades of producer price deflation, a 20 per cent depreciation of the renminbi (Brooks, 2025) since mid-2022, and China's exceptionally efficient supply chains have made the country a far cheaper production base than Europe, whose energy and input costs have soared since Russia's invasion of Ukraine. As a result, major corporations including Clariant, BASF, Shell, Danfoss, Schaeffler, ZF Friedrichshafen, Schneider Electric, Vestas, Roche, and AstraZeneca have expanded manufacturing and R&D operations across China.

The data illustrate this shift decisively. Between 2004 and 2021, Chinese mergers and acquisitions in European maritime infrastructure reached more than €9.1 billion, compared with just €1.1 billion in greenfield projects. Yet by 2023, this pattern had reversed. Chinese greenfield investment surged to €5.3 billion, with a clear concentration in the electric vehicle (EV) and battery sectors. Additional analysis from

the Rhodium Group shows EU greenfield FDI into China reaching a record €3.6 billion in the second quarter of 2023.

China's commercial entanglement in Europe also extends into critical infrastructure and digital technologies. Beijing has assumed operational roles within major European port facilities (Ditrych and Ekman, 2024) ranging from Greece's Piraeus to terminals in Germany, Belgium, the Netherlands, Malta, Sweden, Poland, and Italy. At the same time, Chinese investment in Europe's information and communications technology (ICT) sectors has averaged €3.1 billion annually between 2021 and 2023, with emphasis on 5G networks. This has heightened strategic concerns about technological dependence and the vulnerability of essential European digital infrastructure.

These economic and technological linkages are complemented by China's expanding military diplomacy. Although limited in scale compared with the U.S. or NATO deployments, China has participated in naval exercises (Kaufmann and Pagenkopf, 2025) in the Mediterranean, the Black Sea, the Baltic Sea, the South Atlantic, and the Pacific, sometimes together with U.S. NATO and Asian allies. Such activities, alongside increasing global port access, reveal Beijing's intent to operate as a rising global maritime actor with reach far beyond its immediate region.

China's diplomatic engagement with Europe has grown in parallel. President Emmanuel Macron's December multi-day summit with Xi Jinping underscored Beijing's efforts to court European leaders at a moment of intensified U.S.–China rivalry. Both leaders have warned of the possible "disintegration of the international order" and emphasized the importance of multilateralism, signaling a shared preference for engagement over confrontation. For China, France represents a bridge into EU politics and for Macron, the visit demonstrates France's global diplomatic role amid rising domestic and regional pressures.

Europe's response to these developments reflects ambivalence. European governments are increasingly aware of the strategic risks associated with China's assertiveness, support for Russia, industrial overcapacity, and dominance in critical minerals (Xiaoying, 2023) essential for the green and digital transitions. Yet, Europe's structural economic interdependence with China makes full alignment of Washington's containment agenda with that of Europe neither politically nor economically feasible.

Taken together, these dynamics point to a European position that is neither fully aligned with Washington's containment approach nor permissive of China's expanding influence. Rather, Europe is increasingly pursuing a strategy of selective hedging. While remaining committed to transatlantic security frameworks, European actors are simultaneously seeking to reduce strategic vulnerabilities vis-à-vis China and to diversify their external partnerships. This includes a growing emphasis on

strengthening economic, technological, and security ties with key Indo-Pacific partners such as Japan, South Korea, Australia, and, more cautiously, Taiwan. In this sense, Europe is not moving away from the United States, but it is also not moving closer to China; instead, it is repositioning itself within a more complex, multi-vector strategic environment.

The Emergence of U.S.–China Competition

These patterns of Europe–China proximity do not occur in a vacuum. They are shaped by deeper structural changes in global politics, especially the intensifying U.S.–China competition and the gradual reorientation of Euro-Atlantic security perceptions. The contemporary phase of U.S.–China strategic competition could be traced to President Barack Obama’s “pivot to Asia,” which reaffirmed the United States as a Pacific power. At the time, the shift was framed in relatively soft terms (Goldstein, 2023) and did not alter Washington’s longstanding “One China” policy. The competitive dynamic sharpened significantly during the first term of President Donald Trump, who elevated China to the top tier of American threat perceptions and urged U.S. allies in Europe to adopt a similar posture. Yet even as this competition intensified, the Trump administration refrained from challenging the One China policy directly.

Europe, however, did not initially view China through the same threat lens. Rather, Beijing was perceived as competitive but essential, economically significant and increasingly influential, but not an immediate security challenge. This divergence persisted until December 2019, when China was mentioned (NATO, 2019) for the first time in the NATO summit declaration. The carefully calibrated formulation—acknowledging China as both an opportunity and a challenge—reflected a compromise between Washington and the European allies and marked Beijing’s formal entry into the Euro-Atlantic security agenda.

This gradual shift was accompanied by a more tangible integration of China-related concerns into transatlantic policy debates. Within NATO, discussions increasingly expanded beyond traditional military threats to include issues such as technological dependency, supply-chain vulnerabilities, and the security implications of Chinese investments in critical infrastructure. Similarly, within the EU, the characterisation of China as a “systemic rival” (European Commission, 2019, p.4) began to gain traction, in the context of industrial policy, digital governance, and strategic sectors. While these developments signalled a growing awareness of China’s multidimensional impact on Euro-Atlantic security, they did not produce a uniform policy response. Instead, they exposed underlying differences in how the U.S. and European actors prioritised economic interdependence, security risks, and long-term strategic competition.

Evolving EU and NATO Perceptions of China

Despite the announcement of a “no-limits partnership” between China and Russia on the eve of the February 2022 invasion of Ukraine by Russia, the Euro-Atlantic institutions did not initially categorize China as a direct military threat. In both NATO and the EU, Beijing continued to be framed as a partner on global issues and simultaneously as an economic and strategic competitor. This dual classification was reflected in the EU’s Strategic Compass of March 2022 and in NATO’s Strategic Concept of June 2022, both of which recognized China’s growing influence without identifying it as an imminent military danger.

However, this balanced assessment began to shift as China’s political, economic, and technological support for Russia became more visible and as the war in Ukraine evolved into a protracted confrontation. The Biden administration strengthened Washington’s harder stance on China and encouraged European partners to adopt a similar attitude just like his predecessor did. This contributed to a renewed focus across Europe on strategic vulnerabilities, technological dependence, and economic security.

Former NATO Secretary General Jens Stoltenberg captured this new focus, noting that China was “coming closer” to Euro-Atlantic security and that its rise would have a significant impact on the Alliance. Within the EU, debates around “decoupling” and “de-risking” reflected a growing recognition that Europe’s exposure to Chinese technological ecosystems and market leverage posed systemic risks.

As perceptions shifted, NATO statements became sharper on China, (NATO, 2023) reflecting mounting concerns about Beijing’s behaviour (NATO, 2024) and its implications for Euro-Atlantic security. Simultaneously, developments in Washington complicated transatlantic cohesion. President Trump’s second term marked a profound inflection point. His confrontational rhetoric and transactional approach to alliances strained trust and solidarity between the United States and its Allies and partners.

In the midst of Washington’s firmer line, American and European views on China have not fully converged. In several ways, Trump’s policies inadvertently pushed major European powers and China closer together, even as China continued to support Russia. Escalating trade tensions such as tariffs, export controls, and restrictions on dual-use technology, prompted many countries to “de-risk” not only from China but also from the unpredictable U.S. behaviour.

In this context, European policymakers have increasingly sought to preserve room for manoeuvre by avoiding rigid alignment with either side. While concerns over security risks associated with China have intensified, the perceived volatility of U.S. policies has reinforced the importance of seeking strategic autonomy. This has encouraged a

more differentiated approach in which European states selectively align with Washington on security-sensitive issues, while continuing to engage China in areas of economic and global governance related issues. The result is not a coherent alternative to U.S. strategy, but rather a pragmatic effort to navigate between competing pressures.

Collectively, these developments mark a shift from the optimism of a globalized “Brave New World” to what increasingly resembles an “Unbearable New Disorder”—a geopolitical environment characterized by fragmentation, rivalry, and fading trust.

Shifts in China’s Foreign and Security Policies

China’s foreign and security policy has also undergone a visible recalibration since Xi Jinping assumed power in 2013. Under his leadership, Beijing has adopted a more assertive and at times coercive posture toward its regional neighbours, challenging U.S. primacy in ways reminiscent of Russia’s approach in Europe. China’s actions in the East and South China Seas and across the Taiwan Strait have generated deep concern among neighboring states, including Japan, South Korea, the Philippines, and Taiwan.

Even as Xi centralized power domestically, he initially avoided disrupting the liberal economic order that enabled China’s rise. But this economic openness has been accompanied by a proliferation of global initiatives such as the Belt and Road Initiative, the Global Development Initiative, the Global Security Initiative, the Global Civilization Initiative, the Global Governance Initiative, the Made in China 2025 strategy, and the long-term Global China 2049 vision. Each reflects China’s ambition (Kausikan, 2025) to position itself as a central and dominant power in global order.

A key pillar of this strategy has been civil–military fusion. China has invested heavily in modernizing its armed forces, notably in its naval capabilities, seeking to build a “blue-water” navy capable of sustained operations in open seas. This ambition is visible in Beijing’s expanding overseas port infrastructure, especially in Pakistan and Sri Lanka, as well as China’s military base in Djibouti, illustrating its desire for a maritime presence beyond East Asia.

As a whole, these initiatives are not merely rhetorical but serve as instruments for shaping international norms, economic networks, and governance structures in ways that reflect China’s preferences. For instance, the Belt and Road Initiative, extends China’s influence through infrastructure, connectivity, and financing across Eurasia, Africa, and beyond, while the Global Development and Global Security Initiatives emphasise alternative approaches to development and security cooperation that prioritise state sovereignty and non-interference. Similarly, the Made in China 2025 strategy seeks to upgrade China’s position in global value chains by advancing domestic capabilities in high-technology sectors. Collectively, these frameworks

signal a more proactive and outward-facing Chinese strategy that seeks not only to participate in, but increasingly to shape, the evolving international order.

U.S. Containment Strategy and China's Counter-Leverage

Despite increasing transatlantic concern over China's expanding global influence, it remains essential to distinguish between American and European perceptions of the challenge posed by Beijing. The United States—under the Trump administration—has adopted a markedly more forceful approach, framing China as the principal systemic rival and pressing allies across both the Euro-Atlantic and Indo-Pacific to harden their stances. Between 2024 and 2025, Washington has implemented an expansive set of restrictive measures, including export bans on more than one hundred Chinese technology firms, additional tariffs ranging between 25 and 245 per cent, targeted barriers against electric vehicles and battery technologies, and licensing blocks affecting semiconductor manufacturers. These steps reflect a containment strategy rooted in techno-economic denial and an effort to curtail China's access to advanced capabilities.

These efforts, however, have not always been matched by policy consistency in Washington. The 2025 U.S. National Security Strategy places greater emphasis on the Western Hemisphere followed by other priority areas, contributing to perceptions among some European policymakers that China tends to become a secondary priority (The White House, 2025) in U.S. grand strategy. This perception has been reinforced by episodes in which the United States appeared to recalibrate its economic confrontation with China in the face of potential retaliation, specifically in the domain of critical minerals, where Beijing retains significant leverage. Such developments have introduced a degree of uncertainty among European allies regarding the long-term direction and credibility of U.S. policy.

At the same time, recent U.S. strategic documents suggest that Washington's approach is not purely confrontational but increasingly combines elements of competition, deterrence, and selective cooperation. The 2025 National Security Strategy characterizes China less as an immediate military threat and more as a strategic competitor seeking to expand its global influence, advocating the use of selective multilateral partnerships to protect U.S. interests. Similarly, the 2026 National Defense Strategy emphasizes deterrence and balance-of-power dynamics over direct confrontation (Department of War, 2026), highlighting the role of regional allies in strengthening collective defense capabilities. This framework points to a more calibrated approach aimed at managing rivalry while avoiding uncontrolled escalation.

The U.S.–China relationship remains highly transactional. Much like Xi Jinping, President Trump has adjusted the bilateral tensions to suit broader American political and economic interests. Nationalistic mercantilism has become an increasingly

prominent feature of U.S. policy, reinforcing a zero-sum logic that diverges from Europe's preference for managed competition and selective engagement. Even as the United States adopts a more confrontational posture, it recognizes the limits of unilateral action: Washington cannot effectively offset China's rising power without substantial allied support.

The feasibility of a comprehensive containment framework is further complicated by China's dominant position within global critical mineral and clean-technology supply chains. China controls 65 per cent of global lithium refining, 90 per cent of graphite processing, 73 per cent of cobalt refining capacity, 70 per cent of rare earth element production, and 77 per cent of global battery cell manufacturing (International Energy Agency, 2025). These structural advantages grant Beijing considerable counter-leverage and make it difficult for the United States to lead an international coalition without imposing significant economic costs on itself as well as its partners.

Building Stability Through Dual-Track Engagement

The divergence between American and European approaches to China does not diminish the growing interdependence of Euro-Atlantic and Asia-Pacific security. On the contrary, the interplay between China's regional assertiveness, its global economic reach, and its expanding footprint in Europe underscores the need for a more deliberate and coordinated response. For European actors, within this increasingly contested environment, a dual-track strategy should be understood not as an abstract framework, but as a set of operational policy choices which includes balancing deterrence, engagement, and strategic flexibility while acknowledging the structural realities of the changing international order.

The first track concerns the recalibration of the transatlantic relationship on China. Rather than full alignment with an expansive U.S.-led containment strategy, European states are likely to pursue selective convergence with Washington in areas where interests overlap. This includes maintaining strong cooperation on export controls, investment screening, and the protection of critical infrastructure, while also enhancing supply-chain resilience in sectors such as semiconductors, energy transition technologies, and critical minerals. At the same time, Europe is expected to preserve a degree of strategic autonomy by avoiding across-the-board decoupling and maintaining channels for economic engagement with China. This calibrated approach reflects both Europe's structural economic exposure to China and its preference for managing competition rather than escalating confrontation.

At the same time, a second track is increasingly necessary: a more structured and systematic engagement with Indo-Pacific partners. For many countries in the region such as Japan, South Korea, and Australia, the United States remains the indispensable security anchor. However, deeper engagement with Europe can complement these existing security arrangements by providing additional economic,

technological, and regulatory partnerships. In practical terms, this could involve expanding EU–Asia-Pacific trade and investment frameworks, strengthening cooperation on supply-chain diversification, and deepening collaboration in green technologies, digital governance, and standards-setting. More regularised and structured security dialogues, alongside selective cooperation on maritime security in the South China Sea and the Indian Ocean, could further enhance collective resilience. By diversifying their strategic partnerships, Indo-Pacific states can reduce overdependence on any single external actor while strengthening their ability to navigate intensifying great-power competition.

A credible dual-track approach also requires sustained and carefully managed engagement with China itself as a third, stabilising dimension. Although China has become a more assertive and, at times, coercive actor, it remains a central pillar of global economic stability and an indispensable partner in areas such as climate policy, development finance, and global health. For European actors, managing relations with Beijing necessitates a calibrated balance between reducing vulnerabilities and avoiding unnecessary escalation. This implies maintaining open diplomatic channels, engaging China within multilateral frameworks, and developing mechanisms to regulate crises and prevent miscalculation in sensitive theatres such as the Taiwan Strait and the South China Sea. Engagement, in this sense, does not imply accommodation but functions as a tool of strategic risk management.

These tracks cannot be pursued in isolation. Their effectiveness depends on greater coordination between Euro-Atlantic and Indo-Pacific actors. As China's influence continues to expand across both regions, and as U.S. policy signals remain more often than not ambiguous, Europe is likely to assume a more prominent role as a stabilising intermediary, bridging transatlantic priorities with Indo-Pacific realities. Closer alignment on investment screening, critical infrastructure protection, technology governance, and responses to economic coercion will be essential. Existing frameworks, including NATO's partnerships with Japan, South Korea, Australia, and New Zealand, as well as EU dialogues with key Indo-Pacific actors, provide an initial foundation. Expanding joint maritime activities, strengthening information-sharing mechanisms, and developing shared risk-assessment frameworks would further consolidate this cross-regional architecture of dialogue and engagement.

As China's influence continues to expand across Europe and Asia, and as transatlantic approaches to Beijing diverge, such a multidimensional strategy will be essential for sustaining regional stability, economic security, and a gateway to a more functional international order.

Conclusion

This study has examined how transatlantic partners are increasingly diverging in their perceptions and policies toward China and what this means for the relationship between Euro-Atlantic and Indo-Pacific security. The analysis shows that this divergence is not temporary, but reflects deeper structural changes in the international environment.

For Europe, the challenge is not choosing between the United States and China, but managing relations with both under growing pressure. Security ties with Washington remain essential, while economic links with China continue to shape policy choices. This makes a fully unified transatlantic approach unlikely and reinforces a more selective and pragmatic form of alignment.

Looking ahead, the key issue will be how this divergence is managed rather than whether it can be eliminated. More focused coordination in areas such as technology, economic security, and critical infrastructure will be important, even if strategic positions remain different. At the same time, the increasing connection between the Euro-Atlantic and Indo-Pacific regions means that policies in one region will continue to affect the other.

Ultimately, the way Europe adapts to the strategic environment will have consequences. Its ability to balance competing pressures and work with both the United States and Indo-Pacific partners will play an important role in shaping future patterns of cooperation and stability in the international order.

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Mehmet Fatih Ceylan

He was born in 1957 in Bursa. He graduated from Ankara University, Faculty of Political Sciences in 1979. In the same year, he started to work at the Ministry of Foreign Affairs. He received his Master's Degree from Rutgers (USA)/Princeton Universities. He worked at the Embassy of Islamabad, Consulate General in Deventer and Permanent Representation of Turkey to NATO, Embassy in Brussels and Turkey Mission to the EU. He served as the Consulate General in Düsseldorf and the Ambassador to Sudan and NATO. His last position was Deputy Undersecretary for Bilateral Political Relations. He retired in February 2019. He is currently the President of the Turkish Atlantic Association and Ankara Policy Center.



Ece Şölen dil

Ece Şölen dil completed her undergraduate and master's studies at the Department of International Relations of Middle East Technical University (METU). She is currently a PhD candidate in Politics and International Relations at the University of Edinburgh. Her research focuses on Middle East politics, Turkish foreign policy, and International Relations Theories. She is a member of the Middle East Research Group and the International Relations Research Group at the University of Edinburgh, and is affiliated with the British Society for Middle Eastern Studies.

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