

INTERNATIONAL POLITICS

Towards a common European China strategy?

Mapping EU Member States' policy documents on China

Author: Jacob Mardell

Published by Heinrich-Böll-Stiftung European Union

UPDATED VERSION - January 2025



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About the Author

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EXECUTIVE SUMMARY

The majority of EU Member States do not have any formal China strategy papers. Only Germany, Finland, Sweden and the Netherlands have published China-focused policy documents, while Slovakia has a 2017 strategy on enhancing economic cooperation with China, and Denmark a strategy from 2008. Some EU Member States, such as France and Belgium, and specific government ministries, such as the German Ministry of Economy, have adopted internal China strategies and guidelines that have not been officially released to the public. Austria has joined these Member States recently, reportedly having finalised an internal China strategy. Outside of the EU, Switzerland has adopted a China strategy in March 2021.

Commonly referred to as ‘China strategies,’ these documents outline national positions on China, rather than concrete strategies for managing bilateral relations.

Other countries are at various stages of formulating a China strategy, while some have published Indo-Pacific/Asia strategies, which include a focus on China. Many, however, are unlikely to publish China-specific policy documents in the near future.

Some countries have not published a policy document on China due to a variety of reasons. These can range from lacking capacity and resources to differences in political priorities. Others might choose to adopt only internal strategy documents because they do not wish to make their position public, as this might give away too many insights on government thinking, or could have negative effects on the relationship with China.

The China strategies of Germany, Finland, the Netherlands and Sweden, which experience similar issues in relations with China, are guided by principles that are all consistent with the China strategy communicated at the EU level.

Analysing other policy documents from the EU 27 that mention China, such as Indo-Pacific and Asia strategies or national security strategies, it is clear that differences between countries are more a question of relative emphasis on certain issues, particularly Russia–China, Taiwan and transatlantic cooperation, rather than radically distinct policies.

The China-specific policy documents of EU Member States should be seen as part of a wider evolution in China policy, expressed through various policy papers beginning from the EU-China Strategic Outlook through to the most recent German Strategy on China. In keeping with the Strategic Outlook’s framing of China as a competitor, partner and systemic rival, they help shift emphasis in the wider European discourse towards the ‘competitor’ and ‘rival’ side of the equation.

Who has a China strategy?

Four EU Member States have published foreign policy papers that deal exclusively with China:

- The Netherlands' policy paper '[China-Netherlands: A New Balance](#)' was published in May 2019.
- Sweden's government communication '[Approach to matters relating to China](#)' was released in September 2019.
- Finland's '[Governmental Action Plan on China](#)' was published in June 2021.
- Germany's [China Strategy](#) was published in July 2023.

Additionally, Slovakia published a somewhat outdated [strategy document](#) in 2017 on enhancing economic cooperation with China. Though not an EU Member State, Switzerland is notable for having produced a 40-page '[China Strategy](#)', adopted in March 2021.

Several EU Member States, such as Austria, are planning to formulate strategy documents on China, though these processes are at varying stages of development.

A range of EU Member States have published Asia or Indo-Pacific strategies that feature China to varying degrees, while some are currently formulating Asia-focused policy documents.

For the majority of EU Member States, we must look to generic foreign policy strategies, national security strategies or other official documents, in order to piece together a national position on China. However, many countries do not feature China prominently in official policy papers at all.

Table 1: Status of EU Member States' China strategies

Austria	Input paper commissioned in 2020; China strategy reportedly complete, but remains unpublished. ^I
Belgium	Possesses internal China strategy; may be a more general communication, but undecided.
Bulgaria	No official China strategy present.
Croatia	No official China strategy present.
Republic of Cyprus	No official China strategy present.
Czech Republic	China strategy is reportedly ^{II} in process of formulation; published Indo-Pacific strategy in November 2022, in which China features prominently; Security Strategy published in June 2023.

I 'China strategy' generally refers to public and official China-focused policy papers, unless otherwise stated.

II Reportedly' used here to refer to information obtained indirectly, i.e. from a trusted source but not public information or confirmation from someone directly involved in the process.

Denmark	Published now-outdated action plan on China in 2008 entitled ' Partnership for mutual benefit '.
Estonia	Report on future relations between Asia and Estonia published in June 2022; other projects in development.
Finland	Published a 35-page ' Government Action Plan ' on China in June 2021.
France	Internal China strategy reportedly completed in 2019; new strategy could be forthcoming this year, following Macron's state visit to China in April 2023.
Germany	Published a 64-page ' Strategy on China ' in July 2023; the German Federal Ministry of Economic Affairs and Climate Action also has internal China guidelines.
Greece	Strategy process reportedly began in 2020–2021, but lost momentum.
Hungary	No official China strategy present.
Ireland	No official China strategy present.
Italy	No official China strategy present.
Latvia	No official China strategy present.
Lithuania	Extensive mention of China in policy documents; Indo-Pacific strategy published in July 2023; no China-specific strategy.
Luxembourg	No official China strategy present.
Malta	No official China strategy present.
Netherlands	Published a 53-page policy paper entitled ' China-Netherlands: A New Balance ' in May 2019.
Poland	No official China strategy present.
Portugal	No official China strategy present.
Romania	No official China strategy present.
Slovakia	Published a paper on developing economic relations with China in 2017; new foreign policy strategy reportedly in development.
Slovenia	Asia strategy in development as part of review of general foreign policy strategy.
Spain	Unlikely to have China strategy in development; Asia strategy published in 2018, but doesn't focus on bilateral ties with China.
Sweden	Published a 22-page government communication in September 2019 entitled ' Approach to matters relating to China '.

Why publish a China strategy?

There are several reasons that a government might choose to publish a policy paper on any given topic. Doing so can help increase transparency and accountability in the policymaking process, presenting government policies while implicitly inviting a response from stakeholders and the general public.

A government might also publish a policy paper in order to demonstrate expertise and concern to the public on a hot button issue. Alternatively, they might seek to

stimulate debate and public concern around a government priority, or garner public support by explaining the rationale behind a position.

In terms of setting policy direction, a public document has an advantage over an internal paper in that it provides widely available terms of reference. A public strategy functions like a manifesto, conferring legitimacy to a particular policy direction and providing a government-wide framework for future action.

Often, the very process of formulating a position paper might form an important part of the policymaking process. In order to draft the paper, a government will consult with experts and gather information on a topic. Consensus may also need to be built between different parts of government. As has been the case with the German China strategy, the formulation process itself can be contentious. Through forcing a government to confront a topic and declare a position, formulating a policy paper may eventually help resolve internal differences.

The Dutch, Finnish, German and Swedish policy papers on China all respond to a perceived need to re-evaluate relations with China in light of changing geopolitical realities. They can be seen as part of a wider evolution in China policy, expressed through various European policy papers beginning with the [EU-China Strategic Outlook](#), published in March 2019. With reference to the Strategic Outlook's framing of China as a 'competitor, partner and systemic rival', they help shift emphasis in the wider discourse towards the 'competitor' and 'rival' side of the equation.

Why not publish a China strategy?

The majority of EU Member States have not published policy papers specifically dealing with China. Especially in the case of smaller EU countries, the most likely explanation for this absence is limited government capacity and political prioritisation.

China expertise is scarce and formulating a fresh China strategy is not considered a priority use of government resources. This does not necessarily indicate a reluctance to take a critical stance on China. For example, Croatia and Romania may not have the capacity to prioritise China policy, but are likely to instead orient themselves to the direction set by larger EU Member States, as well as by Brussels and Washington.

In other cases, countries may have the capacity to formulate a China strategy, but choose not to make this strategy public. For instance, Belgium and France both possess internal strategy documents on China, but have not yet published a China-focused policy paper.

The clearest reason to keep such a document internal would be to avoid China learning of its contents. However, it would be possible for a country to possess an internal strategy, as well as to publish a more general public document with sensitive information removed. Indeed, existing public policy papers on China do not contain much in the way of concrete strategy. Instead, they could be more aptly described as position papers, establishing the contours of a national position on China.

It is likely that some governments simply judge that the risks of publicly framing Beijing as an adversary in a national strategic context outweigh the benefits of publishing a China strategy in the ways highlighted above. Another risk associated with formulating a China strategy is that the process might highlight, or even deepen, rifts within a country. These differences might then be instrumentalised by external actors. In presenting strategies, governments must do so involving a broad alliance of political actors.

It is also important to take into consideration variances in political cultures between EU Member States. While some countries are more accustomed to transparency and public engagement in the policymaking process, others may prioritise confidentiality and internal decision-making processes.

Synergies between China strategies

Finland, Germany, the Netherlands and Sweden: not much to disagree on

There is a good deal of common ground to be found between the China strategies of Finland, Germany, the Netherlands and Sweden. There is a clear progression in the sophistication of their assessments, but they largely identify the same bottlenecks in relations with China and profess to be guided by the same principles, all of which are consistent with China strategy communicated at the EU level.

The strategies present a balance of opportunities and challenges in relation to China, noting a shift of emphasis from the former to the latter, as per the 2019 EU Strategic Outlook statement that ‘in Europe, there is growing appreciation in Europe that the balance of challenges and opportunities presented by China has shifted’. The tone is captured well in the Dutch formulation of ‘open where possible, protective where necessary’. This ‘opportunity, but challenge’ formulation is a common thread throughout the strategies.

They all place a clear emphasis on the need for EU cohesion on China and on a values-driven China policy, particularly with regard to human rights. They emphasise that the EU is the ‘most important channel’ (Netherlands), ‘main reference framework’ (Finland) and ‘most important foreign policy arena’ (Sweden), while Germany’s strategy contains a section entitled ‘Germany’s strategy on China as part of the joint EU policy on China’.

There are differences between the strategies in terms of issue areas they cover, but the absence of a topic in one paper does not necessarily indicate disagreement. Some of these differences reflect unique national interests. For instance, Finland extensively mentions China’s influence in the Arctic and the Netherlands policy contains a section on Chinese influence in the Dutch Caribbean, while the German strategy also puts a focus on multi-level governance and Germany’s federal system.

The documents mostly differ in depth and their relative weighting of opportunity vs challenge in their assessment of relations with China. This is partly a question of timing, but not entirely. As might be expected of the most recently published policy

document, the German Strategy on China is the most detailed in terms of specific challenges and prospective solutions. It builds on several years of debate on competition and rivalry with China, as well as the successful development of policy tools at the EU level. However, the 2019 Dutch strategy provides a more thorough and critical assessment than the Finnish paper published two years later.

Of the four strategies, the Dutch and German documents are particularly sophisticated in their assessment of China, its place in the world and the state of bilateral relations. For instance, the Dutch strategy communicates an understanding of Chinese policy elites as being deeply wedded to anti-Western assumptions, noting that this ‘means that the Netherlands can do (or refrain from doing) relatively little to ‘keep China friendly.’

As suggested above, all four policy documents might more accurately be considered ‘position papers’ rather than strategies, in that their primary function is to outline the government’s understanding of China and clarify certain principles for managing the bilateral relationship. However, the Dutch and German papers also go further in specifying policy responses. While the Finnish paper makes promises like ‘Finland will pay specific attention to China’s global role and activities in developing countries,’ the Dutch paper contains a section in each chapter entitled ‘How will we do this?’, with pledges such as ‘The government will invest in creating extra capacity at the Netherlands Enterprise Agency (RVO) in order to give strategic and practical advice on the many visits of Chinese delegations.’ The German paper also suggests specific courses of action, but it is more abstract and non-committal than the Dutch strategy, for instance in statements like ‘The Federal Government will continue to work to raise awareness of risks related to China.’

Common ground and differences among the EU 27

Greater differences emerge when looking beyond the China strategies of Germany, the Netherlands, Sweden and Finland to the more general policy documents of the EU 27, ranging from national security to Indo-Pacific strategies, but there is still plenty of common ground to build on.^{III} Differences are rarely stark distinctions and are more often a question of relative emphasis on certain issues.

Although China strategies that have been published maintain what the Dutch call in their strategy a ‘constructively critical’ approach, the absence of a China strategy does not necessarily signal a neglecting, or even dovish, stance on China, as Lithuania illustrates.

China capacity and coordination

All four existent China strategies contain one absolutely clear policy recommendation. All of the policy documents end with a call to deepen expertise on China and

III Because many countries are lacking publicly available policy documents on China, their interests may not be properly represented. As discussed above, such documents are also unlikely to represent the full spectrum of EU Member States’ interests.

to enhance cooperation on China policy. The Swedish strategy, for instance, contains the provisions for the establishment of a national research-based knowledge centre on China – a programme that has already had some success.

The call to enhance national expertise on China is an obvious actionable item that few EU Member States would find objectionable. However, EU Member States clearly differ in their capacity to build China expertise in-country. The need to develop China expertise is most vital in those countries with limited capacity. The lack of critical, informed debate on China in countries like Malta and Cyprus means that Chinese media and officials have more room to shape the discourse. At the same time, these countries' investment-orientated foreign policies and limited capacity make them easy targets for extending Chinese influence in the EU.

Human rights and EU unity, in principle

An easy point of convergence between EU Member States on China is the need to pursue a value-based approach and to act in unity. Policy documents reliably reference these principles, but they do so with varying degrees of sophistication and commitment. In reality, these principles might take a back seat to national interest in bilateral relations with China, and this is already evident in policy documents.

The Netherlands, for instance, has a relatively progressive take on the centrality of human rights to its China policy. It states that 'China's view of human rights affects three levels: in China, in the Netherlands and at the multilateral level'. Meanwhile, the Greek foreign ministry's 'Strategic Plan 2022-2025' mentions China once, in the context of the foreign policy goal of 'developing cooperation with [...] Russia and China [...] in selected areas and within limits set by international legality, our commitments to partners'. The German strategy, for example, stresses that China has ratified both of the International Labour Organization's fundamental standards prohibiting forced labour and that the government is committed to preventing products made by forced labour from being sold on the European internal market'.

The BRI and connectivity

Many EU countries were initially enthusiastic about China's Belt and Road Initiative (BRI) and the prospect of Chinese investment in their countries' infrastructure. This is especially true of the Central and Eastern European countries (CEEC) that constitute the original 16+1 grouping of CEEC states plus China. The peak of BRI enthusiasm was between 2016-2019. Promise fatigue has since set in and few, if any, EU countries now hold out [hope for significant BRI investment](#). A common position on the BRI and the risks of Chinese investment in European infrastructure is now more accessible than ever. Even the 2020 Hungarian National Security Strategy of pro-China Viktor Orbán's government states, regarding the BRI, that Hungary must 'take into account the factors resulting from the vulnerability that may stem from investment in critical infrastructure'. At the same time, however, it does note that Hungary is 'interested in the vigorous and pragmatic strengthening of Hungarian-Chinese rela-

tions, in particular [...] the Belt and Road Initiative'. The tone differs drastically from the mainstream EU approach, but the commonalities remain. The German government has a particular global view in its China strategy, noting the importance of promoting partnerships with third countries, also as a way to counter the BRI.

The China–Russia axis

The war in Ukraine has changed the China calculus for the whole of the EU, but especially Eastern European countries. Their strategies now consider China in light of Beijing's support for Russia's war in Ukraine. There is an emerging European consensus that the partnership challenges European interests, and that is made crystal clear in the German strategy, which states 'China's relationship with Russia, in particular since Russia's war of aggression against Ukraine, is an immediate security concern for Germany'.

The Latvian foreign ministry's annual report, for example, states that 'China's distancing itself from condemning Russia's invasion of Ukraine is another worrying signal' and emphasises the need to call on China 'to take a more determined and responsible position against the war waged by Russia'. The new Czech Security Strategy, published June 2023, states unequivocally that 'Russia and China share the same interest – to weaken the influence and unity of democratic countries'.

Though not necessarily evident from written communications on China, the war in Ukraine appears to have softened the distinction on China policy between pro-China President Andrzej Duda in Poland and his more China-critical government. As usual, Hungary remains an obstacle to a more united EU position on this issue.

China as a security threat

That China poses a cybersecurity threat to national interests is a point readily acknowledged by EU Member States, though some still shy away from calling out China specifically. More controversial is the claim that China might pose a long-term conventional threat to European security interests. Some countries emphasise more than others the challenge posed by China's military modernization and regional power ambitions. The Dutch strategy notes that China does not pose a direct, conventional threat in the short to medium term, but without explicitly naming China as a long-term threat, it notes with concern China's 'substantial investments in expeditionary capabilities'.

Transatlantic alignment

EU member state policy documents all stress the need for cooperating with 'like-minded' allies on China, but the relative importance they place on cooperation with European vs transatlantic vs Indo-Pacific allies vary.

A clear point of contention is the degree to which alignment with the United States is stressed as a principle of policy on China. Following the war in Ukraine, smaller EU Member States, especially those in the East, have become more firmly committed to the transatlantic relationship. Though this need not be at the expense of EU alignment,

it does have implications for a common EU position. The Czech Indo-Pacific strategy describes the United States as Czechia's 'natural partner and close ally' in the region, for instance, while the French National Strategic Review depicts France as a 'balancing power' that 'refuses to be locked into bloc geopolitics'.^{IV}

The German Strategy also appears cautious regarding transatlantic alignment, noting with a sense of aloofness that 'China has entered into geopolitical rivalry with the United States'.

Interpretation of the Taiwan and One-China policy

Policy documents on China differ in their emphasis on 'enhancing relations' with Taiwan. The question of to what extent and how publicly countries pursue cooperation with Taiwan is likely to be a point of contention between EU Member States. The Baltic countries, along with Sweden and Finland, call for enhancing cooperation with Taiwan, but the majority of member state policy documents are silent on the issue. While stressing continued adherence to a One-China policy, the Dutch and German strategies mention the importance of ties with Taiwan, and the German document states that Germany wishes to expand relations with Taiwan.

Climate cooperation

Emphasising the need for cooperation with China on climate change is standard among policy documents on China and constitutes solid common ground. However, countries differ in the extent to which they emphasise cooperation vs criticism of China on environmental issues. The Dutch China strategy, for instance, strongly emphasises bottlenecks and points of contention regarding climate, including 'the risks of "green-washing" and the leakage of Dutch technology to China'. The German strategy stresses the need for cooperation with China on climate, but also covers the importance of competition with China in renewable technologies and implies that China is falling short of its responsibilities.

Dependence

The key divisive China policy issue within Germany is the extent to which the government should incentivise German companies to reduce their dependencies on China. Although the Finnish and Dutch China strategies raise economic dependence on China as an issue of concern, it is essentially the key concern in the German Strategy on China. Though German economic dependence on China is particularly strong, this is to some extent a reflection of the times. Particularly following Russia's invasion of Ukraine and the exposure of European dependency on Russian gas, the primary occupation and main buzzword in the European China policy debate has shifted from reciprocity to de-risking.

IV French 2022 National Strategic Review

Country by country assessment

Austria

Austria's China strategy, in development since late 2020, is [reportedly complete](#), but remains unpublished. The decision to withhold publication may stem from backlash to Germany's China strategy, released in July 2023, though the process seems to have stalled before then.

In September 2024, shortly before parliamentary elections and nearly a year past the original target, Austria released its new [National Security Strategy](#). The fifty page paper contains one generic paragraph on China, briefly mentioning the South China Sea and the EU's policy of de-risking, claiming that "a targeted reduction of dependencies in critical areas ("de-risking") without decoupling will have to be further developed."

The China policy of the Freedom Party of Austria (FPO), which in January 2025 was tasked with forming a new government, is [not entirely clear](#). Although the party has a pro-Russian stance and high ranking FPO officials have been [linked to China](#), they do mention China critically in their [election manifesto](#).

Belgium

Belgium's internal China strategy was formally adopted by the government in June 2023. Following the 2024 Belgian federal and regional elections, it is the intention of the Belgian foreign ministry to work on an update once a new government is formed. There are no plans to make the strategy or update public, unless the new government decides otherwise.

In December 2021, Belgium adopted its first [National Security Strategy](#). The 48-page document mentions China five times, stating the security threat posed by US-China great power competition and also Russia's and China's attempts to establish a presence in power vacuums along Belgium's periphery.

Belgium's political landscape is fragmented, and there is no clear hierarchy of economic interests and political values. At the same time, Belgium is a staunch sponsor of European unity and multilateral institutions, and its diplomacy regularly emphasises a commitment to democracy and human rights.

Bulgaria

Bulgaria has not published a China strategy, nor does it provide any signal on Bulgarian policy toward China in any official document. Formulating a China strategy is also unlikely to be a priority for the current government.

In February 2024, Bulgaria adopted a foreign direct investment (FDI) screening mechanism, aligning with the EU's 2019 regulation aimed at addressing security risks posed by foreign investments, [particularly from China](#). Following this, Croatia, Cyprus, and Greece remain the only member states without FDI screening mechanisms in place.

In April 2024, the Deputy Prime Minister and Minister of Foreign Affairs presented Bulgaria's first [Foreign Policy Strategy](#). A draft of the strategy has not been made public, but press releases made no mention of China.

Croatia

Croatia has not published a China strategy and is unlikely to release one in the near future. There is not much internal debate on China, and it will likely follow the lead on China from larger EU Member States.

Croatia's National Security Strategy, published in 2017, does not mention China. The Foreign Ministry's 'Implementation Programme' for 2021-2024 mentions China twice in broadly positive terms, citing the Chinese-led '17+1' grouping of Central and Eastern European countries ([now 14+1](#)) as an example of Croatia strengthening its position in the international community. It also states that in Asia, Croatia will prioritise improving relations with China, as well as India, Japan and South Korea.

Cyprus

Cyprus has not published a China strategy and it is unlikely that one is being formulated. Cyprus does not publish many policy documents. There is a reference to a 'Strategic Plan' for 2021-2023 on the foreign ministry's website, but only an ['Economic Diplomacy Strategy'](#), which does not mention China, appears to be public.

Cyprus has not implemented a foreign direct investment screening mechanism. Discourse on China appears largely centred around Chinese media and pro-China voices.^{VIII}

Czech Republic

In June 2023, Prague approved a new [security strategy](#) – the first in eight years. The 22-page document is tough on China, mentioning the country China 13 times, and stating in the executive summary: 'China calls into question the international order. This has adverse implications for Euro-Atlantic security'. It also states that: 'Russia and China share the same interest – to weaken the influence and unity of democratic countries. The systemic competition is of a long-term nature.'

^{VIII} A former ambassador to China made the comment in a 2020 newsletter containing a foreword by the foreign minister that Cyprus adheres to the policy of 'one China' with Taiwan as part and parcel of mainland China. She also called Xi Jinping 'the visionary president of China'.

Since then, no further policy documents on China have been published. This is despite reports that Prague was revising its China policy in 2023. It is unclear whether reactions to Germany's China strategy have discouraged Czechia from taking a similar approach.

Czechia also published a strategy document on the Indo-Pacific in November 2022. The 17-page English language version, entitled 'Closer Than We Think', mentions China 10 times, and acknowledges that 'the dominant topic is our response to China's growing geopolitical and economic influence and its global ambitions'. It notes 'China's grow-ing ambitions and assertive (if not confrontational) approach' and identifies the United States as Czechia's 'natural partner and close ally' in the region.

Further down, the report states that 'China poses a fundamental systemic chal-lenge globally and also in terms of direct influence operations in democratic countries, including the Czech Republic'. It also goes into some detail on the risks that China poses, mentioning 'Chinese investment in Czech and European critical infrastructure, China's domination of strategic supply chains, its control of the key commodities, and the way it develops emerging and disruptive technologies, especially AI, with no regard for ethical rules and international standards.'

Denmark

Denmark published an action plan for China, in 2008, titled '[Partnership for Mutual Benefit](#)'. Denmark's Ministry of Science, Technology and Innovation published a unilat-eral strategy on closer cooperation with China, but both documents are clearly outdated.

The latest edition of Denmark's [foreign and security policy strategy](#), published May 2023 and covering the years 2023-2024, states a recognition that Denmark has "for a long time... been too naive" on China, necessitating a sharpened approach. However, the next paragraph notes the need to engage China, particularly on climate issues. In August 2023, Denmark and China signed a [Green Joint Work Programme for 2023-2026](#) under the framework of their Comprehensive Strategic Partnership and building on the joint work programme established 2017-2020. The document features the standard platitudes on cooperation typical of such joint communiqués. Despite the Danish foreign minister's apparent emphasis on engagement, Denmark's prime minister has also made [hawkish remarks](#) about China regarding its support for Russia's invasion of Ukraine. A fifth edition of Denmark's biennial foreign and security policy strategy is due in 2025.

Estonia

The Estonian foreign ministry completed, in June 2022, a report (in Estonian) on the future of Estonian relations in Asia. Although the working title of the paper was 'Asia Strategy', it evolved into a report on Estonian interests and a [scenario sketching exercise](#). China features heavily, with the four scenarios of 'cooperation', 'separation', 'adaptation' and 'collision' largely revolving around dynamics between the West and China. The report makes several recommendations based on these scenarios. Regarding China, it recommends: Creating 'an overview of value chains in which Estonia has a critical depen-dence on China, in order to prepare an action plan for the implementation of our China Plus One strategy'; In education, distinguishing which '(security-related) areas cooperation with China and other authoritarian countries will continue.'; 'Increas[ing] Estonian society's

awareness of China in order to balance the influence of China's soft power and reduce the threat of espionage.' Contributing experts are currently working on several projects that will develop certain aspects on paper.

Building on the International Security and Estonia 2022 report published by the Estonian Foreign Intelligence Service, the 2023 and 2024 editions also include a chapter on China, divided into three sections. The [2024 edition](#) focuses on China-Russia relations, "China's increasingly ideologised foreign policy," and "threats stemming from Chinese technology."

Finland

After collaboration between Finnish ministries, the Finnish ministry for foreign affairs published a 35-page '[Government Action Plan](#)' on China in June 2021. It had previously published a '[China strategy in 2010](#)'. Like previous China strategies, the action plan is more accurately a summary of Finnish principles and perspectives on issues within the scope of the Finland-China relationship.

The document emphasises the EU as 'the main reference framework for Finland's external relations' and that 'Finnish foreign and security policy is based on human rights'. It acknowledges the 'situation of China's ethnic minorities such as the Tibetans and Uyghurs' as 'key concerns,' and also states support for cooperation with Taiwan as 'an important Asian economy with a functioning democracy and shared values'.

The paper runs through various sectors and issue areas, stating both concerns with China's position and opportunities for cooperation. In contrast to the 2010 paper, the 2021 plan recognises China as a challenge (but not explicitly as a threat) to Finnish interests, shifting from the 2010 emphasis on economic opportunity.

The document references 'the situation of China's ethnic minorities' and Finland's support for human rights in the context of 'foreign and security policy dialogue'. In a long section entitled 'Aiming for a level playing field in commercial activities,' it states that companies are expected to 'have robust risk management processes in place for addressing sustainability and human rights,' and in reference to China's growing role in global value chains, that Finland seeks to avoid 'harmful strategic dependencies'.

Other than a few statements of caution, the rest of this section, and the following section on 'Multisectoral public sector cooperation,' largely deal in issue-specific, but fairly generic, statements such as 'Finland aims to strengthen the EU's Arctic policy and Arctic cooperation, with a focus on climate change mitigation and reducing China's black carbon emissions'.

The third chapter on 'The Overall Framework' of cooperation provides the government's assessment of China's goals and the current state of affairs regarding several trends. The headings of this chapter claim that 'Political stability is a priority for China,' 'China is solidifying its global position and striving for leadership,' and 'Great power competition and the technology race are challenging China'.

The paper does not make explicit recommendations, but it emphasises in the conclusion a need for 'national coordination' on China, 'up-to-date situational analysis' and the need to strengthen 'China-related knowledge' in Finland.

Finland has not updated its [2021 Government Action Plan on China](#) in the past years. China and Finland have however published a “Joint Action Plan” for 2025-2029, following on from Finnish President Alexander Stubb’s state visit to China in October 2024, and updating the previous [2019-2023 Joint Action Plan](#). As is typical of such documents, the plan covers various sectors such as “climate, biodiversity and the environment” with vague, positive promises of cooperation.

Despite potential roadblocks such as damage to a critical Baltic Sea gas pipeline by a Chinese-owned ship [in August 2024](#), the Finnish government has prioritised cultivating a positive bilateral relationship with China.

France

France has not published a strategy document on China. It does have an Indo-Pacific strategy, outlined by President Emmanuel Macron in May 2018 and last updated in February 2022. The document does not go into detail on France’s bilateral relation-ship with China, mentioning it mainly in the context of its economic importance to the region, and once in the context of ‘profound strategic changes’ in the Indo-Pacific: ‘China’s power is increasing, and its territorial claims are expressed with greater and greater strength. Competition between China and the US is increasing, as are tensions at the Chinese-Indian border, in the Taiwan Strait and on the Korean peninsula.’

Unlike in Germany, where the formulation of the China strategy is an inter-ministerial affair, foreign policy in France is highly centralised, especially under Macron, and the process is driven by the President himself. In 2018, Macron set a new direction for France’s China strategy with [his speech in Xi’an, China](#). An internal China strategy was finalised the following year, in 2019.

The defence ministry operates with slightly more autonomy on China policy than other parts of government. The 2022 National Strategic Review mentions China 15 times in 90 pages and contains a section on China. It notes the challenge China poses to France, ideologically, as well as economically, technologically, diplomatically and militarily. It also sees France in the role of ‘mediator,’ referring to France as a ‘balancing power’ that ‘refuses to be locked into bloc geopolitics.’

Since the [2022 National Strategic Review](#) and the last update to the [French Indo-Pacific Strategy in early 2022](#), France has not published any significant policy documents specifically addressing China. However, in practice, France’s China policy under President Emmanuel Macron appears to have evolved in 2024. In contrast with his more conciliatory tone during the French state visit to China in 2023, Macron took a firmer stance with Xi Jinping during the [Chinese president’s trip to Paris in 2024](#). France has also been vocal in supporting EU tariffs on Chinese electric vehicles, a move that triggered [retaliatory measures from Beijing](#).

Given France’s domestic political instability, a new China strategy is unlikely in the near future. Moreover, publishing an explicit, standalone China policy document would be at odds with French political tradition, which favors a less explicit and more situational approach to foreign policy. Paris remains skeptical of Germany’s 2023 China strategy, particularly due to perceived inconsistencies between the strategy’s rhetoric and Chancellor Olaf Scholz’s actual policy actions.

Germany

The German Federal Government published Indo-Pacific guidelines in 2020 and a 64-page 'Strategy on China' in July 2023, following the publication of Germany's first national security strategy in June.

Germany's National Security strategy, mentions China six times, highlighting that 'the elements of rivalry and competition have increased in recent years, but at the same time China remains a partner without whom many of the most pressing global challenges cannot be resolved'. Taiwan is notably absent from the strategy.

The Indo-Pacific guidelines, published in 2020, also mention China some 62 times in 72 pages, though it focuses largely on cooperation with China, referencing competition only in the context of 'technological competition between China and the United States', a development that it claims is 'putting Germany and the EU under pressure'.

The Strategy on China describes the challenges faced by Germany in its relations with China, balancing the need to reduce German economic dependence on China with support for maintaining trade and investment ties. The document explores specific challenges, for instance risks associated with the Chinese market and the need for 'technological sovereignty', but like other Member State's China strategies, it does not make many concrete commitments. More characteristically, it makes statements like: 'The Federal Government will consult on whether existing instruments should be further developed.' The document is also explicit that the strategy will be implemented 'at no additional cost to the overall federal budget.'

The strategy calls out China on human rights abuses, and while re-emphasising the EU's 'One-China' policy, makes it clear that Germany will continue engagement with Taiwan.

The document begins by setting out the logic behind a new German Strategy on China: 'China has changed. As a result of this and China's political decisions, we need to change our approach to China.' It expands on the aims of publishing such a strategy, mentioning first the goal of presenting the government's 'views on the status of and prospects for relations with China'. This section also claims that the strategy provides a 'framework' for Federal Ministries and forms the 'basis for enhanced coordination on China' within Germany, Europe and beyond.

The strategy repeats the EU-level framing of China as partner, competitor and systemic rival, emphasising that 'China's conduct and decisions have caused the elements of rivalry and competition in our relations to increase in recent years'. Regarding competition, the strategy makes clear that it is not the government's intention to 'impede China's economic progress', nor to pursue 'de-coupling', but that 'de-risking is urgently needed'. In reference to the rivalry side of the equation, the strategy notes that China is seeking to 'relativise the foundations of the rules-based order.' Five chapters follow the explanatory introduction:

- A two-page section situating the German strategy firmly within the EU context.
- A section entitled ‘Bilateral Cooperation with China,’ which details various aspects of bilateral relations, including on climate and human rights.
- ‘Strengthening Germany and the EU,’ which contains the core content of the strategy and explores German resilience in the context of competition and rivalry with China, e.g. diversifying supply chains and protection of critical infrastructure.
- ‘International cooperation,’ which recognises the necessity of cooperating with allies in responding to the challenges China poses.
- And finally a two-page concluding section on ‘Co-ordinating policy and build-ing expertise on China.’

The short section on the importance of a ‘joint EU policy’ stresses, as is standard in other member state China strategies, that ‘only an EU acting in concert [...] can achieve results in the cooperation with China.’ It also takes aim at EU candidate countries, noting that ‘it is important that EU candidate countries also shape their approach to China in a way that does not run contrary to pan-European interests’.

The chapter on bilateral relations acknowledges that ‘exchange with China’ has declined in ‘recent years,’ leading to a ‘growing asymmetry in relations.’ Here the strategy also calls out China for human rights abuses in Xinjiang and ‘backsliding on civil and political rights.’ A subsection on human rights also notes that respect for human rights ‘has an economic aspect,’ and that ‘competitive advantages’ should be allowed to arise from violations. A long subsection on the environment references Xi Jinping’s 2021 pledge not to finance coal overseas, noting that ‘China remains the world’s biggest financier of coal abroad.’ In the section on education, the strategy acknowledges, for the first of several times, the Chinese policy of ‘Military-Civil Fusion’ and how it complicates collaboration on civil-ian research projects. Separately, in a section on the 2030 agenda, the strategy notes China’s growing importance to ‘international financial institutions’ and China’s ‘special responsibility in the context of debt restructuring’ for indebted countries.

The next chapter on ‘Strengthening Germany and the EU’ further explores de-risk-ing and diversification measures. On diversifying supply chains, the strategy takes the example of dependence on Russia and states that it is a priority to ‘swiftly’ reduce risks, but at ‘a cost that is acceptable to the German economy’.

The section in this chapter on ‘Risks on the Chinese market’ contains some of the most important passages in the strategy. The strategy states that risks ‘must be more strongly internalised on the part of companies so that state funds do not have to be tapped into in the event of a geopolitical crisis’. In terms of policy response, the strategy simply notes that the government is ‘in dialogue with companies’, is ‘working to raise awareness of this issue’ and that it will ‘consult on whether existing instruments should be developed further.’

The strategy advocates for a ‘modern competition law’ to empower European companies against subsidised Chinese counterparts, and emphasises engagement with the EU for investment strategies. It acknowledges the need for an ‘umbrella law on critical infrastructure’, addresses resilience against interference, including overseas police stations and disinformation campaigns, and acknowledges Chinese cyber espionage.

The chapter on 'international cooperation' deals with global partnerships, multi-lateral fora and security policy. It acknowledges that 'numerous countries are pivoting ever more towards China,' and claims that this is 'due to a lack of alternatives.' In providing a better alternative, however, the strategy notes that it does not intend to 'promote a new confrontation between blocs or to force countries into making us-or-them decisions.' In this chapter, the strategy notes the main Chinese foreign policy initiatives, such as the Belt and Road Initiative, which it claims has 'contributed to unsustainable levels of debt' and has 'created strong political dependencies,' as well as the Global Development Initiative and Global Security Initiative, which it implies are superfluous and unduly China-serving.

The chapter notes the importance of international agreements and partnerships in trade diversification, technology and infrastructure, here referencing the EU's 'Global Gateway' initiative.

Taiwan is mentioned several times, and the strategy states that Germany has 'economic and technological interests regarding Taiwan.' In the section on security policy, China's 'rearmament efforts' are noted with concern, but Russia-China cooperation in the context of the invasion of Ukraine takes centre stage.

On the Taiwan Strait, the strategy claims that 'Germany is working for de-escalation,' and that the status quo 'may only be changed by peaceful means and mutual consent.' It references the 'situation in the South China Sea,' with support for 'efforts to create a substantive and legally binding code of conduct' between China and ASEAN, and it mentions in passing the 'situation in the East China Sea.'

The final section of the chapter makes a call for China to be part of 'multilateral efforts to develop high and binding standards' for responsible use of 'disruptive military technologies,' including artificial intelligence.

The final chapter on 'coordinating policy and building expertise' opens by contrasting German and Chinese political systems, claiming that Germany's political system is characterised by a 'variety of levels and remits of authority,' while the Chinese system is 'built on centralised control'. It notes that China attempts to influence at all government levels, and that as a response the 'Federal Government aims to increase, within current structures, coordination regarding its policy on China.'

This final version of the strategy is much softer than the draft leaked in November 2022, and represents a compromise between the German Federal Foreign Office and the Chancellery. Aside from using much less critical language, the final strategy also removes reference to several economic tools mentioned in the first draft, including a reporting requirement for German companies and the use of 'stress tests in order to identify China-specific risks at an early stage'. Compared to the leaked draft, the final strategy also de-emphasises the importance of working with allies on China, particularly with the USA and within the NATO framework.

Over a year since Germany published its much anticipated China Strategy in July 2023, results have been mixed. On the one hand, the controversial process of drafting the strategy did raise awareness of China across the government and provided some theoretical leverage for policymakers looking to discuss “de-risking” with German businesses.

However, Berlin’s policy actions in 2024 contrasted with even the watered down language on de-risking contained in the strategy document. For instance, despite the strategy explicitly mentioning telecommunications infrastructure, and the interior ministry calling for Chinese components to be removed “immediately” from the German 5G network, the government [finally agreed in July 2024](#), after dragging its feet, that Chinese components would be removed in 2029, when they are due to be replaced anymore. More starkly, Germany, alongside Hungary and Slovakia, was one of only five countries [to vote against tariffs on Chinese EVs](#).

Despite coordination on China being a priority of the strategy, this has been clearly lacking in practice. In June 2024, Digital Minister Volker Wissing traveled to Beijing and in what was seen as a unilateral move, signed a memorandum of understanding on transportation data exchange between Germany and China.

German China policy post-strategy has demonstrated that, without leadership from the top, a public policy document on China may not be enough to truly move the dial on China policy. In June 2024, economy minister Robert Habeck [called for an updated China strategy](#), but it will be up to the new government after elections in February 2025 to decide. The election paper of the CDU does call for a review of the National Security Strategy, but does not mention the China strategy explicitly.

Greece

Greece has not published a China strategy. Two years ago, the national security advisor to the Prime Minister was reportedly tasked with putting together a China policy memo, but the process has not progressed.

Last October, Greece’s national security strategy was presented at the Government National Security Council. China is likely covered, but it has not been published and will remain an internal document until the next general elections, in mid-2023, due to security concerns surrounding Turkey.

The Greek foreign ministry’s ‘Strategic Plan 2022-2025’ mentions China only once, in the context of the foreign policy goal of ‘developing cooperation with [...] Russia and China [...] in selected areas and within limits set by international legality, our commitments to partners [...] and our national priorities’.

Greece, along with Cyprus and Malta, remains without an FDI screening mechanism, though a bill to introduce one may be submitted to parliament in 2025. The [Greek foreign ministry’s strategic plan for 2024-2027](#) makes no reference to China.

Hungary

Hungary has not published a China strategy, and it is unlikely to in the near future. The foreign policy strategy published in 2008 only mentions China in terms of economic opportunity.

The latest national security strategy (2020) contains a section on China, again largely in positive terms. It states that Hungary is ‘interested in the vigorous and pragmatic strengthening of Hungarian-Chinese relations, in particular [...] the Belt and Road Initiative.’ It does warn that Hungary ‘must also take into account the factors result-ing from the vulnerability that may stem from investment in critical infrastructure.’

The position on China demonstrated in policy documents is broadly in keeping with the pro-China inclinations of the current Hungarian government. In May 2024, during President Xi Jinping’s visit to Budapest, Hungary upgraded bilateral ties with China to an ["all-weather comprehensive strategic partnership,"](#) joining a small group of China’s closest partners, including Belarus, Ethiopia, Kazakhstan, Pakistan, Uzbekistan, and Venezuela.

Ireland

Ireland published ‘Global Ireland: Delivering in the Asia Pacific Region to 2025’ in January 2020. The 20-page document mentions China 14 times, purely in terms of economic cooperation.

In October 2023, Ireland published an update to its Asia-Pacific engagement strategy, titled [“Global Ireland: Renewing Our Commitment to Delivering in the Asia Pacific Region to 2025”](#). As in the 2020 strategy, China is mentioned only in the context of engagement. A section titled “China’s Role in the World” reaffirms that “economic, political, and cultural relationships” with China remain a “priority”, adding that this priority will be balanced with efforts to “protect our values and promote our interests. Other government policy papers also make no significant men-tion of China, other than in passing as an economic or cultural opportunity. However, Ireland’s Foreign Minister Michael Martin has staunchly supported the European Commission’s de-risking and economic security agenda.

Italy

China is not a top priority of Italian foreign policy, a fact reflected in the absence of China in Italian foreign policy documents. Italy has not published a China strategy, nor is it in the process of formulating one. The Italian Ministry of Foreign Affairs published, in January 2022, an English language document entitled ‘Italian contributions to the EU Strategy for the Indo Pacific,’ but it mentions China only in passing. In December 2023, Rome informed the Chinese government that it would not be renewing the memorandum on Belt and Road Initiative cooperation signed in 2019, becoming the [first country to formally “leave” China’s Belt and Road Initiative.](#)

Latvia

Latvia has not published a China strategy, and it is unlikely that one will be published in the near future as relations with China have been deprioritised. The [2023 “Annual Report”](#) from the Latvian foreign ministry references China critically many times, though with enhanced concern for the “deepening of the China-Russia strategic partnership.

The 2022 version features a section of China that runs through several Latvian concerns, including China’s relationship with Russia and its ‘growing authori-tarian tendencies, including systematic human rights abuses, especially in Xinjiang’. It stresses the need for a ‘common denominator’ for EU-China cooperation to be found that is based in ‘unity, the ability to defend universal basic values, ensure economic independence and defend one’s economic interests.’

Referencing Lithuania's withdrawal from what was originally the 16+1 mechanism, the 2021 edition of the foreign ministry's 'public overview' recommends 'the development of cooperation to all EU Member States in a common "27+1" format'. The Latvian foreign ministry also publishes on its website the foreign minister's speech at the annual parliamentary foreign policy debate. The [2024 edition](#) mentions China more times than any other, noting that China is "partner," "threat," and "opportunity," and emphasising that the "main point" is not to "create a new dependency" as Europe had done with Russia.

Lithuania

Lithuania does not currently have a public China strategy, though China features in numerous policy papers that have been published. The 2016 'Lithuanian Government Programme on Foreign Policy' is outdated, but the 2020 'Resolution on Directions in Foreign Policy' notes that China is 'challenging EU's unity and essential interests of the Community', and advocates for 'finding a common position on its relations' with China. In this context, it emphasises the need to ensure human rights standards, safeguard strategic economic independence, protect European infrastructure and enable export controls, and supports the development of cooperation with Taiwan and Hong Kong. The 2021 National Security Strategy, extensively mentions the threats posed by China, though it is informational rather than advisory.

In July 2023, the government published a 16-page [Indo-Pacific strategy](#) ('For a secure, resilient, and prosperous Future: Lithuania's Indo-Pacific Strategy'),³⁴ which mentions China 18 times and Taiwan 16 times. The strategy particularly highlights the challenges that China poses (economic and political coercion, Russia-China alliance, willingness to alter the world order, and territorial and maritime disputes).

Although it is more of a report on developments rather than a strategy or policy paper, the 2022 'National Threat Assessment', published by the Intelligence Services and State Security Department, is focused on China and is also a helpful measure of the tone of debate. The paper mentions China 72 times across 74 pages, and its bottom line is that 'authoritarian Chinese foreign policy, economic and information activity are becoming increasingly aggressive.'

Lithuania's [2024 "National Threat Assessment"](#) notes an intensification of Chinese intelligence activities against the country. Similar to the 2022 and 2023 assessments, the report identifies China, alongside Belarus and Russia, as a national security threat. Additionally, Lithuania has passed [progressive de-risking legislation](#) that will take effect in May 2025, aimed at preventing Chinese companies from gaining remote access to the control systems of solar and wind farms.

Luxembourg

Luxembourg has not published a China or an Asia strategy. It publishes an annual foreign policy address by the minister for foreign affairs, the 2022 edition of which featured China 17 times over 38 pages. In this speech, the foreign minister focuses on China's support for Russia, which he sees as 'pro-Russian neutrality'. He expresses support for maintaining the status quo in the Taiwan Strait, but also strikes a more cautious note, warning that 'American policy towards China risks bringing Russia and China even closer together', and stating that 'though there are clearly major disagreements [...] China is and will remain a partner [for Europe] in many areas.'

Malta

Malta does not appear to have any foreign policy documents related to China. Like Cyprus, Malta is a potential gateway for Chinese interests into Europe. There is little policy debate on China and discourse on China is largely dominated by Chinese media.

The Netherlands

The Netherlands published a policy document focused on China in May 2019, entitled 'A New Balance'. The 53-double-paged document explores five themes in relations with China: 1) sustainable trade and investment, (2) peace, security and stability, (3) values, human rights and the international legal order, (4) climate and (5) development cooperation.

The document is less of a strategy and more of a position paper, elaborating bottlenecks in bilateral relations and stating grievances. However, it does go further than the Swedish and Finnish strategies in suggesting specific policy responses, with sections in each chapter on 'Aims' and another entitled 'How will we do this?'.

The first section explores Dutch and European grievances with the bilateral relationship, including lack of reciprocity and level playing field in the economic relationship. With regards to national security and economic activity, it adopts the creed 'open where possible, protective where necessary'. The paper refers to the Dutch cabinet's position as 'constructively critical', and calls for a 'new approach' that is 'open where possible, protective where necessary, and based more on reciprocity'.

On security, it states that China does not pose a conventional short- to medium-term threat, but that the cyber threat is substantial, and expresses concern over 'substantial investments in expeditionary capabilities.'

In the values section, the paper claims that 'China's view of human rights affects three levels: in China, in the Netherlands and at the multilateral level'. It mentions the situation of Uyghurs in Xinjiang and reiterates the government's belief in universal human rights.

The climate chapter, while stating that the Netherlands 'sees opportunities for cooperation with China', also tackles dependency on China for raw materials, and highlights the 'risks of greenwashing' and the leakage of Dutch technology.

On development and debt, the paper states that the 'government sees China primarily as a donor, lender and superpower', and acknowledges both the positive contribution of China as a development actor and 'negative impact, in particular on UN human rights policy, trade policy and multilateral debt forums.'

On the EU, the paper states that 'the government sees the EU as the most important channel in its relationship with China [and] European China policy stands or falls with EU cohesion'. It urges the EU to 'take more account of China's strategic operations and long-term thinking', and that 'the Netherlands would support an EU dialogue with the US on China [and that] coordination of the input with EU Member States is necessary'. It states its priorities in the relationship with China at the EU level as: a) level playing field; b) implementation of the Paris climate agreement; c) human rights and situation of the Uyghurs; and d) the international legal order.

The document devotes space in its chapter on 'cooperation within the kingdom' to 'China's increasing influence in the Caribbean and the surrounding area.'

It makes an interesting acknowledgment that due to the Chinese Communist Party's belief in hostile Western intentions, 'the Netherlands can do (or refrain from doing) relatively little to keep China friendly'. It concludes that 'it is therefore important to seek cooperation on the basis of interests, without having to deny that there are ideological differences'.

The document ends with a call to strengthen knowledge and capacity on China at all levels, and states that the cabinet will 'invest in a long-term knowledge network in the field of China' in collaboration with the national government.

The Netherlands' China strategy, "[Netherlands-China: A New Balance](#)," was published in 2019, and much has happened in EU-China relations since then that is not reflected in the policy document. While there is occasional talk of updating the strategy, no official update or new strategy has been announced.

However, periodic letters from the Cabinet to the Dutch Parliament have served as de facto updates to the government's assessment of China. The [most recent letter](#), an 11-page document dated December 2024, draws on the latest threat assessment from Dutch intelligence services, stating that China, "together with Russia, is seen as the greatest threat to our national security interests."

As with many other China strategies across Europe, capacity building and knowledge sharing remain the most tangible outcomes, with the Dutch China Knowledge Network (CKN) playing a key role in strengthening China expertise across government agencies.

While a new strategy may not be forthcoming, the Netherlands [continues to take the lead on de-risking measures](#), notably through a proactive stance on export controls in the semiconductor sector.

Poland

Poland does not have a China strategy, and it is unknown whether it is in the process of formulating one. China is mentioned only in passing in the Polish foreign policy strategy, and once in the 2020 National Security Strategy, in reference to the 'growing strategic rivalry' between the US and China.

Poland has not released a new foreign policy or national security strategy since the formation of Donald Tusk's government in 2023. However, in April 2024, Foreign Minister Radosław Sikorski [presented the country's "foreign policy tasks" to the parliament](#). On China, Sikorski advocated a position of "cooperate where possible, compete where needed, confront where necessary," echoing the EU's "partner, competitor, rival" framework and reiterating verbatim the European People's Party's 2020 position paper on China, which he is credited with authoring.

In the past, there have been differences between the more pro-China policies of Poland's President Andrzej Duda and the Prime Minister's government, but following the war in Ukraine, the two camps have become more aligned with each other and distant from China.

Regarding U.S.-China competition, Foreign Minister Sikorski emphasized that Poland does not want to be forced into a binary choice "between maintaining good relations with a major trade partner on the one hand, and the most important security provider on the other." While acknowledging Poland's close economic ties with China, he stressed that national security has become the country's overriding priority following Russia's invasion of Ukraine. He called on China to better understand Poland's security concerns, implying unease about China's growing alignment with Russia.

In June 2024, on the occasion of President Andrzej Duda's trip to China, China and Poland also published an ["Action Plan" for 2024-2027](#), running through the usual platitudes on cooperation that typically characterize such joint communiqués.

Portugal

Portugal has published neither a China strategy nor an Indo-Pacific strategy, though it has been a [vocal advocate of the EU Indo-Pacific strategy](#). Foreign ministry texts mention China only in passing, largely in terms of economic opportunity. Its 2013 defence strategy mentions China three times, also in the context of seeking a stronger partnership. A [revised](#) strategic concept [is due](#), and it is possible that this document will incorporate a more critical and up-to-date version of geopolitical realities.

Romania

Romania has not published a China strategy, and it is not known to be formulating one. Neither does it have a national strategy for the Indo-Pacific. Any new decision on a Romanian China strategy will be postponed until after new elections scheduled for March 2025, after the first round in November 2024 [was annulled](#) following allegations of irregularities involving Chinese-owned social media platform TikTok. China was not high on the agenda for election candidates and the Asia-Pacific remains relatively low on the list of Romanian foreign policy priorities. Its 2021-2024 Government Programme contains a paragraph on Asia that briefly references EU initiatives and documents, claiming that 'Romania can contribute to the achievement' of the EU Indo-Pacific strategy by 'developing bilateral relations with like-minded partners in the region'.

On Romania's relationship with China, it states that 'activities arising from the broad partnership and cooperation will be continued, respecting the economic and strategic interests of Romania and in accordance with the [2019 EU] Joint Communication.' It also states that Romania 'will contribute constructively to the strengthening of a single voice of the EU Member States in relation to China.'

Romania's National Defence Strategy 2020-2024 briefly mentions China in the context of China-US tensions, stating that US 'pre-eminence' will 'remain indisputable', and that this is 'tantamount for Romania's national interests.'

Slovakia

In 2017, Slovakia published an optimistic strategy on developing economic relations with China. This was intended to be followed up with an action plan, but the foreign ministry stopped its adoption after it was realised that the plan overly focused on economic opportunities. There is a foreign policy strategy under preparation that should include a chapter on the Indo-Pacific, but the status of preparation is unknown.

The Slovakian foreign ministry publishes several policy documents that touch upon China. Its 2022 Strategic Foresight document mentions China 46 times in 56 pages, and outlines several scenarios that turn on the admission that 'geopolitical development' is 'primarily determined by the ongoing rivalry between the US and China.'

The 2021 annual foreign affairs report contains an interesting emphasis on not only European, but transatlantic alignment: 'A credible approach to European and transatlantic integration and a clear stance towards our allies in order to consolidate European and transatlantic unity must be part of our foreign policy.'

The 2020 foreign policy framework suggests a slightly softer stance on China, inserting before the EU's framing of China as a partner, competitor and rival the assertion that 'China is at the centre of current geopolitical dynamics, and Slovakia wants to develop bilateral relations with China with an emphasis on economic cooperation and resolution of global problems'.

Slovakia's 2021 National Security Strategy, the most recent available, reiterates the partner/competitor/rival framework, and acknowledges that China is using military, economic and political means to 'assertively [...] advance its interests,' and promises to take into account in mutual relations the fact that China 'promotes its own model of governance and a different understanding of human rights and freedoms'.

Although the shift has not been formalized in any specific policy document, Slovakia has taken a markedly pro-China turn under the Euroskeptical populist Robert Fico, who was elected in October 2023. During Fico's state visit to China in November 2024, Slovakia and China elevated their bilateral ties to a "strategic partnership," issuing a [joint statement](#) that included a commitment to "firmly oppose the politicization and instrumentalisation of human rights issues." Slovakia, alongside Germany, Hungary, Malta, and Cyprus, also voted against proposed EU tariffs on Chinese electric vehicles.

Slovenia

Slovenia has not published a China strategy. Neither has it published a strategy on Asia, but a new [Slovenian foreign policy strategy](#) was adopted in December 2024. The forty page document mentions China only in passing, noting that "China is strengthening its presence in Europe, but despite providing business opportunities, it is becoming an ever-stronger systemic and strategic rival. The Slovenian National Security Strategy (2019) does not mention China.

Spain

Spain does not have a China strategy, nor is one likely to be in development. In February 2018, the foreign ministry did publish a 32-page document entitled 'A Strategic Vision for Spain in Asia' that mentions China 33 times, but largely in terms of China's economic importance. It does contain a section on the BRI, which claims that the initiative presents 'numerous opportunities' and has 'attracted interest in Spain,' but cautions that it requires monitoring by Spain and the EU 'to ensure that the principles of openness [...] are duly taken into account'. The document also notes that the 'human rights situation in most Asian countries is not good', but does not single out China.

Spain's 'Foreign Action Strategy' for 2021-2024 mentions China 25 times in the 122-page document, firstly in the context of US-China rivalry, and then in the section on Asia. The chapter on Asia states that 'China is the most relevant country with which more balanced relations should be sought, especially in the economic sphere, while at the same time trying to strengthen the EU's position'.

It outlines three principles of Spain's policy towards China: 'that it establishes a long-term framework for relations with China'; that it 'enables the major global challenges such as the fight against climate change [...] to be tackled jointly'; and that 'it does not ignore the clear elements of rivalry that exist in the areas of values and interests.'

Spain's current 'Foreign Action Strategy' covered the period 2021-2024, so it is anticipated that Madrid will develop a new strategy for subsequent years, though there is no official release date announced for the forthcoming strategy. Spain's latest Asia strategy, covering the years 2018-2022, has expired and is expected to be updated.

Sweden

Over the past several years, Sweden and Lithuania have had the most strained relations with China among EU countries. However, Sweden has recently entered a period of relative normalization, with the Swedish trade minister's [visit to China in November 2024](#) marking the first ministerial-level exchange since 2018.

Sweden has published a government communication on China, a 22-page document, dated 26 September 2019, entitled 'Approach to matters relating to China.'

The document describes itself as an outline of 'Sweden's relations with China and the Government's approach to matters relating to China,' which it claims as necessary 'in light of China's growing influence in the world and the new implications, opportunities and challenges this brings.'

After the introduction, the paper begins with an assessment of China today, under headings such as 'China's system of government' which states that 'China is a one-party state without general and free elections.' The chapter also contains sections on state involvement in the Chinese economy, China's growing global influence, military capabilities, and China's innovation and technology development. The following chapter briefly outlines bilateral relations, followed by a chapter emphasising the EU as 'a cornerstone' of Swedish China policy.

The fifth chapter outlines 'The Government's Approach to China,' running through a number of issue-specific sections: Security and defence policy; Trade and economics; Climate and environmental issues; China as a multilateral actor; Human rights; China as a development actor; Technology, innovation, and digital transformation; Research and education; and Culture and media.

The beginning outlines several principles in the government's general approach to China:

- 'Build on the interests and values of Sweden and the EU'
- 'Harness the opportunities that China's development offers and manage the challenges'
- 'Increase collaboration [on China] within and between the public sector, business and civil society'
- 'Promote stronger EU cooperation [on China]'
- 'Increase knowledge of conditions in China.'

As with other Member State's China strategies, it strongly emphasises a common EU approach.

On security, the paper stresses the need to ‘consider the risks’ posed by ‘collaboration that occurs between Swedish and Chinese actors.’ It urges greater cooperation between allies on assessing and acting on security challenges posed by China.

On the economy, it states that the Swedish government ‘will be a driving force’ for EU negotiation of agreements that facilitate a more ‘level playing field for Swedish companies.’ It supports the participation of Swedish companies in Chinese infrastructure projects in third countries.

On climate, it states that the government will seek cooperation with China, but that it ‘supports the EU making greater climate and environment demands of China.’

On multilateralism, it states that Sweden will, primarily through the EU, ‘demand that China abides by its international law obligations and that it take responsibility for rules-based multilateral cooperation.’ It also states that ‘China should no longer be considered a developing country.’

On human rights, it pledges that the government ‘will raise the issue of the serious human rights situation in China in a clear and consistent manner.’

On development, it states that it ‘is essential that China endorse the Paris Declaration and the principles of aid and development effectiveness, cooperate with OECD/DAC and comply with the ODA criteria.’

On technology, it acknowledges that ‘China is becoming increasingly important for Swedish companies’ with regards to innovation, but that there are also ‘risks and challenges associated with China.’ Here it calls for more knowledge on conditions and trade-offs that may arise.

It strikes a more optimistic note on research and education, stating many challenges but also the primary goal that ‘awareness of Sweden as a knowledge and innovation nation is high’ in China.

The paper does not suggest concrete policy solutions, but rather states support for EU policy, or makes general statements such as: ‘The Government will protect and promote international law in cyberspace and existing models of internet governance built on multiparty collaboration rather than state control.’

In conclusion, the document acknowledges the communication as ‘the start of, and basis for, a broader discussion on China.’ Its clearest call is for establishing a greater knowledge base on China and enhancing communication on China, nationally and across the EU.

There is limited political will in Sweden to publish a new China strategy similar to the [2019 Government Communication on China](#), although some voices have called for a more operational approach. The most tangible outcome of the 2019 document was the establishment of the Swedish National China Centre. Beyond that, the strategy process elevated China as a policy issue, keeping it on the agenda across various government agencies for several years.

China is no longer the polarizing issue it was in 2019. A broad consensus has formed around viewing China as a competitor and rival, reducing the appetite for a new policy document that might unnecessarily provoke Beijing.

In July 2024, Sweden published a new [National Security Strategy](#), which mentions China 20 times—compared to only once in the 2017 iteration. The strategy unequivocally states that “China’s totalitarian development, geopolitical ambitions, and efforts to reshape the rules-based world order pose a threat to Sweden’s national security.”

(Non-EU) Switzerland

Switzerland has a 40-page 'China Strategy', adopted 19 March 2021. True to Switzerland's reputation for neutrality, it adopts a slightly less critical tone than the German, Finnish, Dutch or Swedish strategies, and is more focused on economic cooperation. Focus areas are: Peace and security; Prosperity; Sustainability, and Digitalisation.

It acknowledges that because of 'Switzerland's commitment to democracy, the rule of law, human rights and a liberal international order', the relationship with China 'increasingly faces conflicting objectives.' The document does not shy away from acknowledging the challenges China poses to Switzerland. The balance of interests is summed up here: 'Switzerland is neutral, does not belong to any bloc, and is committed to dialogue with all states. At the same time, it will continue to defend its long-term interests and values.'

The document poses several objectives in its relationship with China:

- 'Switzerland will pursue its long-term interests and values with regard to China's security policy agenda more effectively.
- Switzerland will champion the principles of the international order in its dealings with China.
- Switzerland will encourage constructive engagement from China on arms control.
- Switzerland will defend against Chinese espionage and interference activities on Swiss soil.
- Switzerland will promote respect for human rights in China.'

(Non-EU) United Kingdom

In the UK, the most important document related to China strategy is the 'Integrated Review of Security, Defence, Development and Foreign Policy', published by the Cabinet Office in March 2021. The document describes China as a 'systemic competitor' and notes that 'China's increasing power and international assertiveness is likely to be the most significant geopolitical factor of the 2020s.'

The 2023 Integrated Review Refresh (IR2023), in March 2023, included a much longer section on the threat posed by China, using the phrase 'epoch-defining and systemic challenge.' The updated IR2023 pledges that the government will double funding for China capabilities across the government. The IR2023 uses three buzzwords to describe its China policy: 'protect', meaning national security and defence of supply chains, academic freedoms and critical infrastructure; 'align', meaning working with allies to counter China abroad; and 'engage', meaning cooperation with China and continued economic engagement where possible.

Recommendations for further research

This study provides a starting point for further research into the difference between EU Member State's China policies and the value of having a public China strategy.

Only four EU Member States have published China focused policy documents in the past five years. Even these documents, commonly referred to as 'China strategies', are not so much concrete strategies as position papers on China.

In order to assess the common ground and points of divergence on China policy between EU Member States, it would therefore be necessary to go beyond publicly available policy documents. Further analysis of officials' statements on China and desktop research into relations with China, as well as interviews with stakeholders and country experts, would provide more substance for analysis.

The absence of policy documents on China is interesting in and of itself, and raises the question of whether EU countries *should* be working towards national strategies on China. It would be highly valuable to further assess the role such documents play in the policymaking process.

This mapping exercise touches upon the likely motivations behind publishing or not publishing a China policy paper, but further research should be conducted on the process around formulating a national China strategy document.

It would be worthwhile asking what effect the published strategies in Finland, Germany, Sweden and the Netherlands have had on China policy and the debate in those countries. Learning how these countries have or have not implemented review and evaluation mechanisms might also provide valuable insights for countries currently moving forward with the strategy drafting process.

Additionally, and drawing from stumbling drafting processes in Austria and Greece, it would be worth considering how governments might keep momentum going during and after the process of formulating a China strategy document.

Map 1: China policy documents and Indo-Pacific strategies in EU Member States, UK and Switzerland



Source: Jacob Mardell (research) & Joan Lanfranco (DataViz) created with Datawrapper.

Towards a common European China strategy?

Mapping EU Member States' policy documents on China

The majority of EU Member States do not have any formal China strategy papers. Some EU Member States and specific government ministries have adopted internal China strategies and guidelines that have not been officially released to the public. Commonly referred to as 'China strategies', these documents outline national positions on China, rather than concrete strategies for managing bilateral relations. Other countries are at various stages of formulating a China strategy, while some have published Indo-Pacific/Asia strategies, which include a focus on China. Many, however, are unlikely to publish China-specific policy documents in the near future. Some countries have not published a policy document on China due to a variety of reasons. These can range from lacking capacity and resources to differences in political priorities. Others might choose to adopt only internal strategy documents because they do not wish to make their position public, as this might give away too many insights on government thinking, or could have negative effects on the relationship with China. In this publication, Jacob Mardell unveils the state of play of these strategy papers in all EU Member States, Switzerland and the United Kingdom.

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