

TOWARDS 'EXTREME COMPETITION':

Mapping the contours of US-China relations under the Biden administration

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MAIN FINDINGS AND CONCLUSIONS

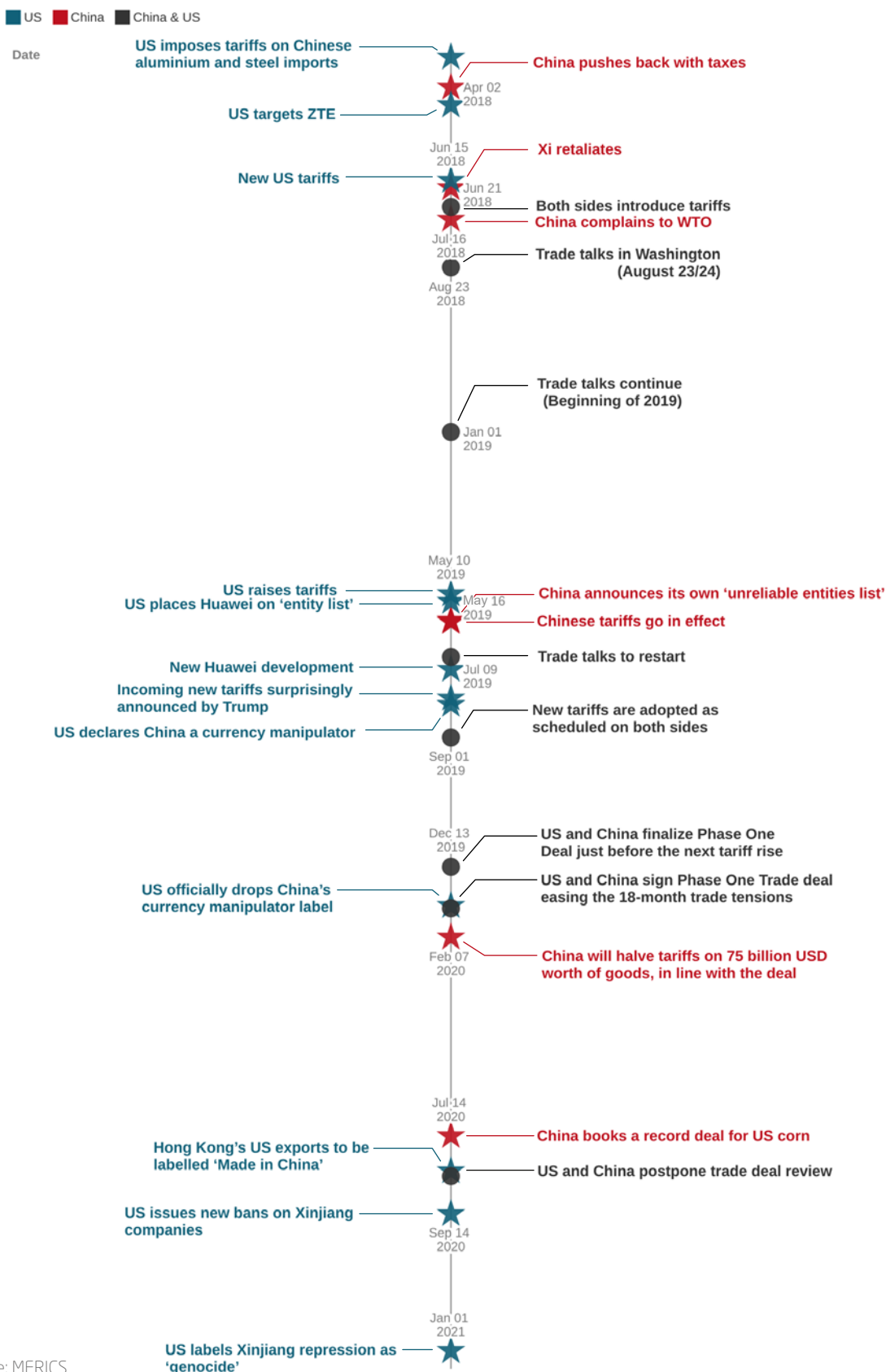
- The new US government under President Joe Biden is likely to adopt a significantly different approach to China than the Trump administration did. There are early indicators of how in its statements and actions in **five key areas**: economic relations, pandemic and climate change challenges, regional rivalry, and working with allies on values-based responses to China
- Members of Biden's team have already signaled that the US-China relationship will be framed in less zero-sum terms and seek to balance competition and cooperation.
- On **economic relations**, the administration will need to choose between a punitive and a constructive approach on trade and China's industrial policy. The key indicator will be whether it continues Trump's "decoupling," especially in critical technology and supply chains or focuses instead on domestic renewal and competitiveness.
- On the **global pandemic and climate-change challenges**, the administration has made clear it supports multilateral efforts, and its openness to cooperation with China. The crucial indicator will be whether it seeks a climate grand bargain with China or instead builds coalitions to compete with China on issues like green technology and "vaccine diplomacy."
- With regard to **regional rivalry**, the key indicator will be whether the administration emphasizes military and security issues or seeks to compete more on trade and investment issues, including infrastructure connectivity, in cooperation with others.
- Also important is how much the administration makes shared values the basis of working with others on China-related issues. Indicators will come on forging common **positions on China's actions in Hong Kong and Xinjiang**, and on its attempts at "economic coercion." Values may take a back seat to forging common responses on issues like the Belt and Road Initiative or the South China Sea.
- Europe will find **many opportunities to partner with the Biden administration** on shared concerns about China's economic and human rights behavior, and also to cooperate with both on global health and climate concerns. Yet, the United States will likely focus more on competition and even confrontation with China than a Europe that emphasizes a mix of competition, partnership and rivalry.





Tariffs, talks, winners, losers

Three years of US-China trade conflict



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1. THE BIDEN ADMINISTRATION FACES FUNDAMENTAL CHOICES OVER THE DIRECTION OF THE US-CHINA RELATIONSHIP

Over the last four years, the relationship between the United States and China descended into tension-filled acrimony. Increasingly caught between the world's two greatest powers, other countries now watch closely to what extent the administration of President Joe Biden will resemble or differ from that of Donald Trump in its dealings with China. It is widely agreed that **Trump's presidency saw the end of the decades-old US consensus around a strategy of "engagement" with China.**

Yet, despite continued talk of a new bipartisan consensus on China,¹ the Biden administration has been critical of the failures of the Trump's China policies and will seek to demonstrate the superiority of its own approaches. In doing so, it faces three fundamental choices:

- To prioritize competition or cooperation with China
- To prioritize punitive or constructive measures where the two countries are in competition
- To prioritize unilateral or multilateral approaches on China-related issues

The direction of the US-China relationship as a result of how the Biden administration makes these choices is of vital interest for Europe, which not only will be greatly affected if the relationship remains acrimonious but also has experienced tensions in its own dealings with Washington and Beijing. Biden and his advisors over time have given strong hints as to how they view these questions, but the decisions they make in the coming weeks and months will clarify how they wish to shape the US-China relations for the next four years.

Observers in Europe and elsewhere seeking a clear understanding as to what kind of relationship with China the Biden administration will pursue will find indicators of this in its early statements and actions across the following key policy areas:

- Framing the relationship
- Economic relations, especially over trade, technology, and industrial policy
- Global challenges of the coronavirus pandemic and climate change
- Regional Rivalry
- Working with partners based on shared values

For Europe, the principal question is whether it will have to live in a world in which China and the United States are in a confrontational, zero-sum relationship. Indicators in each of these policy areas will provide answers to that overarching question. This is not to overlook that China's actions will also be key in determining the direction of the US-China relationship during the Biden administration.

2. FRAMING THE US-CHINA RELATIONSHIP: COMPETITION VERSUS COOPERATION

How the Biden administration begins to frame the relationship with China will produce the earliest indicators for the direction of the US-China relationship in the coming years.

The previous administration shifted the existing framing of the relationship by seeing China as a "strategic competitor" rather than as a "strategic partner." Trump and many of his advisors came into office apparently sharing the view of Peter Navarro – whom the president appointed as his assistant for trade and manufacturing policy – that the United States risked "death by China."²

The administration's key documents and many official statements emphasized that China aims to replace the United States as the dominant power in Asia and globally. The 2017 *National Security Strategy* argued that China "seeks to displace the United States in the Indo-Pacific region, expand the reaches of its state-driven economic model, and reorder the region in its favor."³ The 2018 *National Defense Strategy* stated: "As China continues its economic and military ascendance, asserting power through an all-of-nation long-term strategy, it will continue to pursue a military modernization program that seeks Indo-Pacific regional hegemony in the near-term and displacement of the United States to achieve global preeminence in the future".⁴

In 2020 Trump and his Secretary of State, Mike Pompeo, increasingly portrayed China's authoritarian political system as a global existential threat, including insistence on naming the coronavirus the "Chinese virus" or the "Wuhan virus". As Trump's team prepared to leave office, it increasingly emphasized the authoritarian threat posed by the Chinese Communist Party (CCP). By the time Trump left office, the administration had brought to a greater level its combined emphasis on the balance-of-power and ideological threats posed by China to the United States and the rest of the global community.

Biden and his advisors have long struck a different tone, but the core narrative they use in office will indicate the direction the relationship is likely to take. Biden wrote in *Foreign Affairs* last year that "China is playing the long game by extending its global reach, promoting its own political model, and investing in the technologies of the future," that Trump had failed to effectively confront this "special challenge," and that his administration would reinvigorate US domestic competitiveness.⁵

The key question is whether the Biden administration retains the language of "strategic competition." His National Security Advisor Jake Sullivan and Kurt Campbell, now Indo-Pacific coordinator in the National Security Council (NSC), wrote in 2019 that the era of "engagement" was over but the Trump administration's focus on "strategic competition" was unhelpful because it "reflects uncertainty about what that competition is over and what it means to win."⁶ They argued that the United States should instead aim for "clear-eyed coexistence [with China] on terms favorable to U.S. interests and values."

With Biden emphasizing that China should expect "extreme competition" from the US,⁷ other members of the administration have already begun to stress different tools and arenas for it compared to what they argue was the Trump administration's overemphasis on the military arena. Last year, Sullivan co-authored an article arguing that the United States' international economic and technological competitiveness, as well as its influence in global institutions, were just as important as military competition with China in Asia.⁸ Yet, the administration will need to decide exactly what balance to strike between the elements of a more comprehensive approach that includes economic, technological, and institutional approaches with more traditional security and military ones.

For early indicators of the Biden administration's emphasis on competition or cooperation, one can already look to statements made by appointees to China-related positions. For example, in his Senate confirmation hearing, Antony Blinken said that he had "no doubt" that the CCP's goal is for China "to be the world's predominant political, geopolitical, military and economic power, and for the United States to decline in relation".⁹

But in an indication of the administration's efforts to emphasize the multifaceted dimensions of the relationship with China, Blinken has also remarked that "Increasingly,

that relationship has some adversarial aspects to it. It has competitive ones. And it also still has cooperative ones.”¹⁰ Other appointees, such as Ely Ratner at the Department of Defense, can be expected to continue to emphasize China’s “illiberal” behavior domestically and internationally.¹¹

The choice of specific framing language will become more apparent in proposed high-level diplomatic summits as well as the administration’s eventual National Security Strategy and National Defense Strategy. For now, **what can be expected is that the administration will maintain much of the tough language about the economic, strategic, and ideological challenges posed by China**, while emphasizing the needs for a broader balance of cooperation and competition depending on the issue and the region.

How the administration frames the US-China relationship within its intention to better align foreign policy and domestic economic interests will also be revealing. The Democratic Party criticized the Trump administration for “launching a trade war with China that they have no plan for winning—creating incredible hardship for US farmers, manufacturers, workers, and consumers in the process.”¹²

Biden wrote in *Foreign Affairs* that he would “equip Americans to succeed in the global economy—with a foreign policy for the middle class [and that] to win the competition for the future against China or anyone else, the United States must sharpen its innovative edge.”¹³ He has also said that more effectively competing with China will require more job-creating investment in US technology and more cooperation with other countries to ensure that trade with China is fair.

3. RECALIBRATING ECONOMIC RELATIONS: THE CHOICE BETWEEN A PUNITIVE AND CONSTRUCTIVE APPROACH

How the Biden administration starts to tackle the economic issues that lie at the center of many tensions between the two countries will provide clear early indicators about the direction of the US-China relationship. The choice between a punitive and constructive approach in particular will play out in measures relating to trade and China’s technology and industrial policy.

The Trump administration emphasized restructuring the economic relationship given broad US frustration with what it labeled as China’s “economic aggression,” including its unfair trade policies and assertive industrial and technology policies. The White House’s 2020 *Strategic Approach to the People’s Republic of China*, for example, stated: “Beijing’s poor record of following through on economic reform commitments and its extensive use of state-driven protectionist policies and practices harm United States companies and workers, distort global markets, violate international norms, and pollute the environment.”¹⁴

Much of the Trump approach to address these concerns focused on the risks posed by China’s economic strategies and policies, and on punitive measures to combat them – from tariffs to investment screening, export controls, and the push to keep Huawei out of 5G rollouts around the world. Given that none of these issues have been resolved to Washington’s satisfaction, the Biden administration inherits many of these concerns. The question is to what extent it will also favor punitive measures or whether it will focus more on developing constructive measures aimed at domestic strengthening and coalition-building abroad.

Biden has not only criticized Trump's trade war with China as ineffectual and costly to the US middle class, he has also said: "I want to make sure we're going to fight like hell by investing in America first [and that the United States] will not enter into any new trade agreements until we have invested in Americans and equipped them to succeed in the global economy".¹⁵ Yet, such an emphasis on prioritizing domestic rebuilding and competitiveness does not mean the administration will ignore the continuing concerns the United States has with China's trade practices.

Speaking in January, Jake Sullivan noted specific areas of "most problematic trade abuses, including dumping, including illegal subsidies for state-owned enterprises, including forced labor and environmental practices that hurt American workers and farmers and businesses."¹⁶

Indicators about the direction of the US-China relationship during the Biden administration will be seen in its response to concerns about China's state-supported trade policies. In particular, in whether it retains specific Trump-era punitive measures like unilateral and broad-based tariffs or whether it switches to pursuing more joint action with international partners to reinforce existing institutions like the World Trade Organization. While for now, the administration has indicated that it will not pursue rejoining the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), it may yet engage in such discussions or in alternative frameworks along with Asian allies and partners, especially if China continues to hint at its own willingness to join CPTPP.

With regard to China's technology and industrial strategies, Biden inherits the Trump administration's "decoupling" agenda. This was motivated by concerns about China's tech-driven industrial and innovation policies, including unfair state support for Chinese firms and intellectual property theft. In response, the Trump administration relied heavily on punitive measures such as export controls, supply-chain security, financial controls, and pressure on allies to restrict Chinese tech firms from their 5G infrastructure.

Biden and his team have also voiced concerns about China's tech and industrial ambitions and policies. Biden has argued that "as new technologies reshape our economy and society, we must ensure that these engines of progress are bound by laws and ethics... and avoid a race to the bottom, where the rules of the digital age are written by China and Russia."¹⁷ But they have also argued for an approach less focused on decoupling and punitive measures, and instead more on constructive measures to strengthen the United States' domestic tech innovation and capacities and working with international partners to set global standards.

The administration is likely to put constructive support for domestic innovation and working with allies in Europe and Asia to develop and defend technology standards and ethics ahead of technological decoupling and punitive measures. An indication of this will be how much it continues to push for more punitive restrictions against Huawei and for decoupling of semiconductor supply chains versus more constructive support for domestic tech research and development or global tech alliances.¹⁸

4. ADDRESSING THE CORONA CRISIS AND CLIMATE CHANGE: WALKING A FINE LINE BETWEEN COOPERATION AND RIVALRY

The Biden administration has to make major choices for how to approach two vital global

challenges in which the United States and China are key players: the coronavirus pandemic and climate change. How it does so will be indicative as to what it kind of overall US-China relationship it wants.

With regard to the coronavirus pandemic and the broader question of global health governance that this has made highly salient, the Trump administration portrayed China as a global existential threat with talk of a “China virus” and announced the intention to withdraw the United States from World Health Organization (WHO) in July 2021. It also linked China’s role in the coronavirus crisis to the need for deeper decoupling in health-related supply chains.

For example, last May a State Department official said: “We’ve been working on [reducing the reliance of our supply chains in China] over the last few years but we are now turbo-charging that initiative”.¹⁹ More recently, a global competition over “vaccine diplomacy,” especially in developing countries, has been brewing between the United States and China (and Russia also).

In contrast, **Biden and his advisors have connected the need for a more coordinated and effective domestic response to the pandemic and reengaging on global health security**, including through the WHO. In initial calls with European officials, Biden has emphasized that the United States is keen to on “tackling common challenges such as climate change, Covid-19, and the global economic recovery”²⁰ and administration members indicated on their first day in office the intention to cooperate with the WHO’s COVAX global program for common vaccine and health coordination efforts, especially in developing countries.

Yet, the administration will likely walk a fine line between closer cooperation with China on this issue and pressure to hold China to account for the origins of the virus’s spread and on global vaccine competition.

With regard to climate change, Biden’s policies will stand in sharp contrast to those of Trump’s, which pulled the United States out of the Paris Agreement and ended climate cooperation on China begun under the Obama administration. In his *Foreign Affairs* article, and in the same paragraph where he notes that China is the world’s largest carbon emitter, Biden stated: “The United States must lead the world to take on the existential threat we face—climate change.”²¹ He has appointed former secretary of state John Kerry to a new cabinet post as his special presidential envoy for climate.

Climate policy will feature prominently in the administration’s dealing with China; the question is whether it will favor a more cooperative approach to construct global alliances or a more competitive one that highlights America’s willingness and ability to combat climate change while emphasizing the gap between China’s lofty climate rhetoric and its often-lagging follow through.

While rejoining the Paris Agreement is an early indicator of a commitment to work for global climate solutions, how the administration approaches the UN climate conference in November will provide a more detailed picture. At that and other forums, the United States may choose to work directly with China on reforging a grand bargain on climate or instead working with European and other partners to pressure China to meet its own domestic and international climate and environmental commitments.

5. US-CHINA REGIONAL RIVALRY: BEEFING UP ECONOMIC AND INSTITUTIONAL COMPETITION

The growing competition between the United States and China over the last four years has played out not only at the bilateral and global levels but also in Asia, Africa, and Latin America as well as in parts of Europe to some extent. The Biden administration's policies in these regions, especially in fields that relate to China's activities there, will also provide indications as to the future of the US-China relationship.

The Trump administration chose to frame strategic competition with China in Asia through the concept of the Free and Open Indo-Pacific (FOIP). In its 2019 FOIP document, the State Department said that the United States "is and always will be an Indo-Pacific nation" and that "competition...is not conflict."²²

Biden's advisors have signaled that they will build on, but also revise this Trump-era framework, including substituting "secure and prosperous" for "free and open" in their language. **Washington's approach to the Indo-Pacific may also be less focused on the military sphere.** Jake Sullivan wrote that "Trump has continued to emphasize traditional military and security investments" and that the United States also needed to shore up its economic, technological and institutional competitiveness relative to China in the region.²³

In Asia as in other regions, the Trump administration warned other countries of China's malign intentions and influence as well as its predatory economic policies. For example, the 2020 *White House Strategic Approach to the People's Republic of China* argued that projects associated with the Belt and Road Initiative (BRI) "are characterized by poor quality, corruption, environmental degradation, a lack of public oversight or community involvement, opaque loans, and contracts generating or exacerbating governance and fiscal problems in host nations."²⁴ The Trump administration branded such activities as "debt trap diplomacy."

Biden and his advisors have said relatively little directly about the BRI. Sullivan has argued that the United States needs to understand the sources of China's strength and weaknesses beyond just Asia, and that to counter the BRI across Eurasia and Africa it needs to deploy "the softer tools of competition—from providing alternative sources of 5G technology and infrastructure investment to showing competent leadership in tackling global problems."²⁵

The Biden administration seems set to adopt a different approach than Trump's to competing with China at the regional level. As the details of this approach emerge, they will also provide important indicators for the direction of the US-China relationship. One broad indicator will be whether the administration makes significant efforts to focus on non-military engagement with allies and partners in the Asia-Pacific or if it emphasizes military and security issues like tensions with China in the Taiwan Strait and the South China Sea or long-simmering concerns about North Korea.

If it continues to focus on the Quad format of military and security cooperation and coordination with Australia, India, and Japan, this is likely to indicate a retained focus on narrower military competition with China in Asia. On the other hand, cooperation with others in the region such as South Korea, Taiwan, and Southeast Asian countries on economic development issues as a counter to the BRI will indicate shifting the balance away from military and security issues.

6. THE ROLE OF PARTNERS: GETTING ALLIES ON THE SAME PAGE WITH REGARD TO CHINA

A key element of the Biden administration's approach to dealing with China will be the extent it tries to do so alone or with partners. The Trump administration withdrew the United States from cooperative, global efforts to set climate and trade standards, yet it also worked more closely with Indo-Pacific partners, specifically through the Quad, on shared concerns about China's military and technology policies and behavior in Asia and beyond.

Alliances and multilateralism were at the heart of Biden's entire foreign policy campaign platform, and thus he stressed this dimension when with regard to China. For example, in December he said that the best China strategy "is one which gets every one of our — or at least what used to be our — allies on the same page. It's going to be a major priority for me in the opening weeks of my presidency to try to get us back on the same page with our allies."²⁶ The coming weeks and months will show to what extent his administration puts this into practice and prioritizes efforts to forge common positions on China.

A crucial part of this will be how much the administration makes shared values the basis of its multilateral efforts in China policy. Writing in *Foreign Affairs*, **Biden said he would aim to enhance the United States' leverage over China by coordinating foreign policy with democratic partners.** He has also said: "The most effective way to meet [the China] challenge is to build a united front of U.S. allies and partners to confront China's abusive [economic] behaviors and human rights violations."²⁷

Biden's talk hints at the possibility of a US-led grand coalition, likely of Asian and European countries. Yet, Kurt Campbell and Rush Doshi, now Director for China in the NSC, have argued that the United States "will need to be flexible and innovative as it builds partnerships. Rather than form a grand coalition focused on every issue, the United States should pursue bespoke or ad hoc bodies focused on individual problems."²⁸ Given their emphasis on the importance of the Indo-Pacific framework, their argument suggests the administration will prioritize Asian partnerships for leverage on certain issues and European alliances for others.

The Trump administration also emphasized the threats that the CCP and its authoritarian system pose not only to US and global interests but also at the level of values. The White House's 2020 *Strategic Approach to the People's Republic of China* stated: "When Beijing... promotes or abets authoritarianism, self-censorship, corruption, mercantilist economics, and intolerance of ethnic and religious diversity, the United States leads international efforts to resist and counter these malign activities."

However, Biden and his advisors have argued that the Trump administration failed to consistently emphasize democracy, human rights, and liberal values as part of strategic competition with China. For example, Campbell and Doshi argued that Trump was "cavalier about support for democracy and human rights in ways that weakened the United States' natural partners and emboldened Chinese authorities in Hong Kong and Xinjiang."

The importance the Biden administration places on partnerships based on shared values will be shown by who it chooses to work with and on which issues as it tries to build coalition to exert leverage over China. It will also be reflected in how it approaches issues of democracy, human rights, and liberal values in relation to China. Early indicators in this regard will come on forging common human rights-focused positions and responses

on Hong Kong and Xinjiang as well as on which countries are invited to Biden's proposed Summit for Democracy.

On alignment among liberal democracies on economic issues, an early indicator will be decisions about common positions with European and Asian allies and partners on China's "economic coercion" or its trade and investment restrictions targeted at countries such as Australia, Norway, and Sweden. Yet, on some economic and security issues, especially in Asia, emphasis on democratic or liberal values may take a back seat to forging common responses with some Central Asian countries on responses to the BRI or with countries like Vietnam on China's military activities in the South China Sea.

7. CHINA'S ROLE IN THE GAME: DEMONSTRATING STRENGTH AND ASSERTIVENESS ACROSS POLICY ARENAS

How US-China relations evolve will also have a great deal to do with China's policies and responses to the United States and others. As Sullivan and Campbell noted in 2019, "China will have a say in whether [coexistence] is possible."²⁹ Across the policy areas discussed here, these are the key trends to look out for.

Framing the US-China Relationship: China is likely to continue to emphasize US efforts to contain it and to deepen efforts to show that it is the more reliable economic partner for many developing countries as well as a leader in promoting trade openness and global responses to climate change compared to a fickle United States. It will continue to emphasize the effectiveness of its governance model compared to the US one and will promote itself as a leader in international "development."

Economic Relations: China will continue to bargain with the United States on key trade and investment issues such as market access and protection of intellectual property rights, while emphasizing the importance of the foreign investment law that it adopted during its negotiations with the Trump administration. Yet, it will also ramp up its efforts to minimize the risks it perceives from interdependence with the United States and will emphasize tech-related industrial policy.

Global Challenges: Drawing an explicit contrast with the United States, China will ramp up efforts to show that its response to the coronavirus pandemic is a model to be emulated and will focus particularly on "vaccine diplomacy,"³⁰ especially with developing countries in Asia, Africa, and Latin America. It will also emphasize its commitments to climate and clean-energy goals at home³¹ while promoting its global leadership and commitment to a green BRI. In both policy areas, it will likely be willing to bargain with the United States and others to demonstrate its commitment to addressing global governance challenges.

Regional Rivalry: China will continue to emphasize its role as a leader and engine of international development and will attempt to bolster solidarity with developing countries in Asia, Africa, and Latin America. Beijing will continue to emphasize the importance of the BRI, increasingly substituting clean-energy technology and investment for coal within it, and promoting the Digital Silk Road and the Health Silk Road. Southeast Asia and developing country regions like Africa are likely the two arenas China will focus on in competition with the US.

Values and Ideology: China will continue to emphasize the chaos and dysfunction of

democracy in the United States, especially if the latter's domestic politics remain violent and polarized. China will likely double down on its brand of systemic competition by continuing to emphasize the importance of "stability" at home and abroad and to argue that its system of government is uniquely adept at ensuring that stability—especially compared to the United States.

8. IMPLICATIONS FOR EUROPE: HIGH HOPES FOR TRANSATLANTIC COOPERATION, BUT HARD WORK REQUIRED

The decisions of the Biden administration, as well as the likely actions of China, will condition Europe's room for action. Following four years of friction, many in Europe see opportunities for a reinvigorated transatlantic relationship built on common concerns about China. This has been encouraged by the rhetoric from Biden and his advisors on the importance of allies.

Yet, as the controversy over the EU-China Comprehensive Agreement on Investments (CAI) shows, getting the two sides, in Biden's words, "on the same page" will be easier said than done. What is more, the United States had begun to focus more on Asia, where it also has strong networks of allies and partners, during the Obama administration. The Biden administration will not necessarily need to choose between its European and Asian partners, but it will certainly test the waters for what kinds of alliances are likely to live up to the high expectations created by its emphasis on working together with like-minded democracies.

Across the policy areas discussed above, these are the key trends to look out for.

Framing the US-China Relationship: Europe can expect the Biden administration to make early efforts to work toward common positions and policy responses on China. Yet, Europe's framing of China as simultaneously a partner, competitor, and systemic rival will remain a more delicate (or even quixotic) balancing act than even a US approach that downplays China as an existential threat. Any effort by the administration to balance competition and cooperation with China will likely entail a confrontational edge and stressing elements of systemic rivalry beyond what Europe is likely to endorse.

Economic Relations: The potential and imperative of US-Europe cooperation on several issues related to China is high. If the Biden administration downplays hard decoupling and instead emphasizes coalition-based standard setting and shoring up international trade and investment rules, then the prospects for cooperation are high. It is likely to be keen to push quick cooperation with Europe on tech-related and economic security issues.

At the same time, Europe should be wary of Chinese overtures meant to thwart greater transatlantic coordination on economic issues. The recently signed CAI deal will not scupper greater US-Europe cooperation on shared economic concerns about China, but it does highlight EU commitments to forge its own path on China policy. Successful US-EU coordination on economic issues will require an initial focus on practical, even technical cooperation on issues with clearly measurable outcomes.

Global Challenges: Heightened interest from the Biden administration in promoting global climate and sustainable-energy cooperation provides a major opportunity for US-Europe collaboration. The UN climate conference in November will be a major opportunity for the

two sides to align their climate goals and to push China for more ambitious climate action. Yet, as with trade and investment, either the United States or Europe may be tempted to sign up to separate agreements with China in a bid to demonstrate their own climate leadership.

Equally, on the coronavirus pandemic, the Biden administration focusing on enhanced vaccine access and recovery cooperation, especially in developing countries, opens many opportunities for US-Europe cooperation. The primary question will be whether that is framed as a broader cooperative effort with China or as part of enhanced, competitive “vaccine diplomacy.”

Regional Rivalry: If the Biden administration maintains the Indo-Pacific framework for competition with China in Asia, then ongoing efforts in Europe to also adopt Indo-Pacific strategies (for example, by France, Germany, the Netherlands, and the United Kingdom) will create broad scope for coordination with the United States and Asian countries such as Japan and India.

Yet, because European approaches to the Indo-Pacific will continue to be less focused on military and traditional security approaches than the US one, there will likely be greater scope for cooperation in trade, investment, and standard setting in tech and infrastructure. NATO’s recent focus on China offers a potential venue to bridge security and economic issues in the transatlantic and Indo-Pacific frameworks.

Values-based Partnerships: Europe will find much broader scope for cooperating with the Biden administration on emphasizing democratic values and human rights on shared concerns about China’s policies on issues like Xinjiang and Hong Kong. If the Biden administration chooses issue-specific, ad hoc coalitions, European policymakers will need understand how it will balance its emphasis on cooperation with European versus Asian partners, and where Europe can gain most traction by cooperating with the United States.

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