

# Like-minded traders: What a Euro-Pacific trade alliance could deliver

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## INTRODUCTION

At a time when rules-based multilateral trade is under assault from the United States, long a pillar of the global open trading system, like-minded nations in Europe and the Pacific whose prosperity hinges on dependable commercial governance must join forces. US economic coercion may only worsen, with the lopsided EU–US trade deal likely to entice President Donald Trump to press for further concessions.<sup>1</sup> Trump has also hit Pacific allies with high tariffs.

This Policy Brief examines the EU’s strategic options for closer engagement with the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), which includes Australia, Brunei, Canada, Chile, Japan, Malaysia, Mexico, New Zealand, Peru, Singapore, the United Kingdom and Vietnam. Together, the EU and CPTPP trade blocs account for nearly 30% of global GDP. The paper evaluates three potential pathways: full accession to the CPTPP, the creation of a joint dispute settlement mechanism to supplement the paralysed World Trade Organisation (WTO), and the pursuit of enhanced, structured cooperation that delivers pragmatic economic and regulatory benefits without the complexity of formal membership. The third option is clearly the most practical.

The analysis explores the implications for economic diversification and competitiveness, trade governance and geopolitics and internal EU political dynamics. It weighs economic benefits against potential domestic fallout in certain member states (notably France) and possible risks to EU–China and transatlantic relations. It argues that deeper EU–CPTPP ties could both help

revitalise rules-based trade and provide a platform for advancing longer-term trade governance reforms.

European Commission President Ursula von der Leyen first floated the idea of closer EU–CPTPP engagement in April 2025 following Trump’s announcement of sweeping US tariffs on most of the world. She pitched the idea to EU leaders at the June European Council to “show to the world that free trade with a large number of countries is possible on a rules-based foundation”.

EU Trade Commissioner Maroš Šefčovič launched the first EU–CPTPP Trade and Investment Dialogue with the 12 CPTPP trade ministers in Australia in November. Discussions covered five key areas: trade diversification, digital trade, trade and investment facilitation, supply chain resilience and the global trade environment, including WTO reform. They issued a joint statement declaring common commitment to rules-based trade and indirectly criticising Chinese and US “market distorting practices, which distort trade and investment flows, affect resilient supply chains and cause excess capacity”.

## BACKGROUND: THE CPTPP

The CPTPP is one of the regional trade agreements (RTAs), with high trade liberalisation and standards. It grew out of the Trans-Pacific Strategy Economic Partnership agreement concluded by Brunei, Chile, New Zealand and Singapore in 2005. This paved the way for the later development of the Trans-Pacific Partnership (TPP), which the US sought to join before pulling out of negotiations in 2017 during Trump’s

first term. It provides comprehensive market access and the reduction of both tariff and non-tariff barriers across almost all trade in goods and services. All parties will liberalise at least 95.9% of their tariff lines by 2039 at the latest.<sup>2</sup> The level and the speed of tariff liberalisation varies by country (e.g., Singapore lifted all its tariffs at entry into force in December 2018, and New Zealand in 2024). At the same time, some CPTPP members keep tariff rate quotas (TRQs) to protect sensitive agricultural industries.<sup>5</sup>

The CPTPP now spans a broad region covering Asia-Pacific and the Americas, including major economies such as Japan, Canada, Australia, Vietnam and Mexico. The admission of the UK as the first European country in December 2024 and calls for the CPTPP's continued expansion<sup>4</sup> make the bloc far more than a traditional Pacific Rim pact. By its marker size, the CPTPP is already a significant player in global trade representing about 590 million people and about 14.4% of global GDP (\$15.8 trillion).<sup>5</sup>

CPTPP member states position the bloc as open and committed to trade liberalisation and a rules-based trading system. Liberalisation commitments in trade in services generally go beyond members' obligations under the WTO General Agreement on Trade in Services (GATS). The agreement includes extensive disciplines across a broad range of policy areas, including investment, government procurement, intellectual property, competition policy, state-owned enterprises, environmental and labour protection, electronic commerce, support for Small and Medium-sized Enterprises (SMEs), and transparency and anti-corruption. To reduce trade barriers and promote regulatory coherence, the CPTPP combines alignment on common regulatory principles with facilitation of sector-specific mutual recognition arrangements, enabling members to accept one another's conformity-assessment results and streamline market access.

The CPTPP is open to other countries to join in accordance with the Auckland Principles,<sup>6</sup> such as ability to meet the CPTPP's rules and market access commitments<sup>7</sup> and a history of compliance with their existing trade obligations. Several countries expressed their interest<sup>8</sup> in joining the CPTPP, including China, Costa Rica, Ecuador, Uruguay and others, with Costa Rica having advanced the most among applicants.

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China's case is politically sensitive, both because of its economic and geopolitical weight and due to its trade practices. Recent tension between China and Japan over Taiwan is also bound to complicate Beijing's bid.

Despite its relatively recent establishment, the CPTPP is already showing clear trend of growing impact, with members benefitting from improved market access<sup>9</sup> for both imports and exports – particularly in sectors where liberalisation went beyond what was available under bilateral agreements.

## STATE OF PLAY

### Growing ties amid WTO paralysis

The EU has recently stepped up in its bilateral trade and economic engagement in the Indo-Pacific, including with CPTPP members. It has trade and partnership agreements with nine CPTPP signatories<sup>10</sup> and is currently negotiating free trade agreements with two others (Australia and Malaysia), while also deepening its engagement with Brunei. About 11% of EU goods exports went to the 11 CPTPP countries in 2024, rising to 24% when the UK is included. CPTPP accounted for 10% of EU goods imports, or 17% including the UK.

These agreements between Brussels and Asia-Pacific countries are more comprehensive and innovative than anything agreed at the WTO,<sup>11</sup> particularly as the WTO's dispute settlement system has been crippled by US opposition. The EU has signed separate sectoral agreements supplementing existing FTAs with several CPTPP countries, notably in fast-moving policy areas such as digital trade, the green transition, raw materials, investments and mutual recognition of conformity assessments.

In the absence of a fully functional WTO dispute settlement system, many CPTPP signatories, along with the EU, have joined the voluntary Multi-Party Interim Appeal Arbitration Arrangement (MPIA).<sup>12</sup> Separately, the CPTPP operates its own dispute settlement system,<sup>13</sup> which governs conflicts arising among its members.

As the multilateral system has faltered over the last decade, broad-based plurilateral arrangements such as the CPTPP and Mercosur have appeared to fill the void and drive developments in trade alignment, harmonisation and liberalisation within specific regions. These blocs have proved a stable framework for deepening trade among their signatories.

Closer EU–CPTPP cooperation could focus on aligning practices across their respective dispute settlement mechanisms, with the aim of shaping a new body of international judicial trade jurisprudence. Given the long-standing US hostility<sup>14</sup> to the evolution of WTO case law, the two blocs have an opportunity to forge a shared understating of trade issues. One option would be to pilot a joint appellate mechanism building on the MPIA.

## Trade and diversification potential

The EU has expressed its intention to deepen cooperation and strengthen trade ties with the CPTPP as part of its EU Strategy for Cooperation in the Indo-Pacific.<sup>15</sup> The CPTPP brings together EU's strategic allies and partners that, in the EU's view, "share the same attachment to multilateralism, free and fair trade, and a rules-based global order". A network of existing bilateral trade and partnership agreements, strong economic ties and shared strategic interests already provides a solid foundation for deeper engagement.

EU-CPTPP cooperation could complement and reinforce these bilateral frameworks, enabling more coordinated regional engagement in priority areas including trade and economic security, as well as the green and digital transition.<sup>16</sup> Closer ties would also reinforce the EU's economic presence in the Americas and Asia-Pacific, improving access to dynamic markets.

Engaging through a plurilateral framework such as the CPTPP could lower compliance and administrative costs compared to managing a patchwork of bilateral agreements. It would also advance the EU's 'friendshoring' agenda by redirecting trade and investment towards trusted partners that share core values on transparency, sustainability and rules-based governance.

For CPTPP members, deeper cooperation with the EU could similarly strengthen economic security and diversification while reducing over-reliance on China in the region.<sup>17</sup> Cumulation with the EU<sup>18</sup> is a particularly important issue for several CPTPP countries, such as the UK and Japan, given the high degree of integration between their supply chains and the EU market, especially in automotive, electronics, machinery and certain high-value agri-food and chemical sectors.<sup>19</sup>

The CPTPP's rules of origin are widely viewed as one of the agreement's most strategically beneficial features,<sup>20</sup> providing a common, standardised framework across the bloc. Full cumulation<sup>21</sup> among CPTPP members allows exporters to source inputs from anywhere in the bloc while preserving tariff preferences and thus facilitating supply-chain diversification across the region.

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An important opportunity for deeper EU-CPTPP cooperation lies in potential arrangements on rules-of-origin cumulation (diagonal or extended),<sup>22</sup> which could substantially strengthen EU-CPTPP supply-chain integration. Any such framework would need to include stricter origin disciplines vis-à-vis non-participants, given concerns over transshipment risks and unwanted indirect sourcing, for example, from China. In the near term, more flexible approaches of cumulation could be pursued, limited to specific products, sectors, partner countries or agreements, without requiring identical rules of origin across all parties. For example, as proposed by the Swedish Board of Trade, extended cumulation could be applied on existing EU-CPTPP trade agreements,<sup>23</sup> allowing the EU and individual CPTPP partners to treat selected inputs from other CPTPP countries as originating on a sectoral or product basis.

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However, important differences between the EU's and the CPTPP's regulatory environments must be assessed realistically. The EU's investment protection model centres on its Investment Court System (ICS), a permanent, two-tier tribunal staffed with tenured judges, strict ethical rules, full transparency and an appeal mechanism – designed to replace ad hoc Investor-State Dispute Settlement (ISDS) in line with Court of Justice of the EU requirements. By contrast, the CPTPP retains a reformed but arbitration-based ISDS system relying on party-appointed panels without a standing judiciary or automatic appeals.

Similarly, the EU's stricter GRDP rules, combined with the CPTPP's requirement for free cross-border data flows, poses a challenge: only three CPTPP members (Canada, Japan and New Zealand) are recognised by the European Commission as offering adequate data protection. Moreover, the EU generally applies more demanding standards on food safety, animal welfare and traceability,<sup>24</sup> embeds stronger sustainability and labour provisions, and relies on more detailed and administratively demanding rules of origin. It is unlikely to loosen them.

## Geopolitical considerations

The EU's closer alignment with, and potential accession to, the CPTPP carries significant geopolitical and economic implications well beyond the partnership itself.

How CPTPP members perceive EU engagement will be key, as these governments ultimately shape the bloc's negotiations and strategic direction. Reactions to date have been mixed, yet cautiously receptive. Japan,<sup>25</sup> Canada<sup>26</sup> and New Zealand have shown the most active engagement, while Australia and Malaysia participate indirectly through ongoing bilateral free trade negotiations with the EU. Key challenges include regulatory alignment, rules of origin, internal EU political dynamics and sector-specific disputes, such as those surrounding the EU Deforestation Regulation (EUDR) and the Carbon Border Adjustment Mechanism (CBAM).<sup>27</sup>

The wider strategic geometry is also crucial, with China's influence a critical factor. Beijing applied for CPTPP membership in 2021, but negotiations have stalled. Key obstacles include liberalising financial services, enabling cross-border flows of electronic data and addressing monopolistic practices by state-owned enterprises (SOEs).<sup>28</sup> Should China negotiate carve-outs or weaken standards, the regional framework risks dilution into a lowest-common-denominator agreement. Conversely, full compliance would integrate China into a rules-based system governing investment, SOEs and digital standards – an outcome that seems unlikely.

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China has not so far responded to the joint EU-CPTPP ministerial statement and continues to portray itself as fully prepared to join the bloc. It may well view the EU's association with the bloc as a contest of norm-setting and bloc influence. EU accession would strengthen the CPTPP's regulatory core and curb Beijing's ability to shape regional trade rules – a prospect likely to provoke Chinese resistance. If excluded, China might double down on alternative arrangements it already promotes, notably the Regional Comprehensive Economic Partnership (RCEP),<sup>29</sup> creating parallel frameworks that could counterbalance CPTPP influence.

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The United States is another variable. Its withdrawal<sup>30</sup> from the original TPP in 2017, framed as a move to protect domestic manufacturing and national sovereignty, left a strategic vacuum.<sup>31</sup> An EU-linked CPTPP would highlight Washington's absence from a framework it once championed and place additional pressure on the US-led Indo-Pacific Economic Framework (IPEF),<sup>32</sup> which lacks binding market access commitments. It could potentially reduce US economic leverage in a region Washington sees as decisive.

While EU engagement might be perceived as encroaching on US interests, projections indicate that exports from Asia-Pacific countries to the US could decline by around 6.4%.<sup>33</sup> US trade hawks including Trump himself, if riled, could frame EU-CPTPP cooperation as an 'anti-US' trade bloc. In reality, closer ties between two major trading blocs primarily reflects economic pragmatism, even if it may complicate transatlantic coordination on trade and regulation.

Beyond bilateral and regional considerations, EU engagement with the CPTPP carries significant implications for multilateralism. Accession could accelerate the shift towards mega-regional agreements and plurilateral rulemaking amid WTO paralysis. Yet the CPTPP could also serve as a testing ground for WTO reform and as a coalition of the willing capable of reinvigorating global trade governance. The EU's involvement could help align CPTPP disciplines with multilateral norms, turning the bloc into a laboratory for next-generation rules on digital commerce, sustainability and supply-chain resilience. However, higher CPTPP or EU-level standards also risk widening the gap between 'rule-makers' and 'rule-takers', raising barriers for countries unable to meet the requirements.

## Internal EU dynamics

Within the EU, there is varying enthusiasm for exploring closer ties with the CPTPP. Germany and the Nordic states are strongly in favour of what the Commission has framed as a 'structured partnership' rather than full accession to sidestep sovereignty concerns and potential political backlash. Agricultural states such as France, Poland and Ireland strongly resist any trade agreements that heighten farm competition, as has been demonstrated by persistent opposition to

the EU-Mercosur agreement. Closer ties with a bloc that includes major food producers such as Australia, Canada and New Zealand could reinforce fears of being flooded by beef, sugar and poultry imports, requiring safeguards such as quotas, exclusions or long transitions.

Beyond agriculture, disputes over food safety, pesticide limits, geographical indications and protection of public services complicate negotiations. Combined with unanimity requirements and likely vetoes, these factors make full EU accession improbable, leaving structured cooperation and incremental regulatory alignment as the politically realistic path.

But high-standard EU public policy objectives should not prevent cooperation. In the near term, targeted, sector-specific solutions look more feasible than full regulatory convergence. EU sectoral partnerships (e.g., digital partnerships,<sup>34</sup> mutual recognition agreements<sup>35</sup> and sustainable food system dialogues) could serve as templates for broader regional cooperation.<sup>36</sup>

The CPTPP is designed to be a ‘living agreement’,<sup>37</sup> with a built-in review mechanism so that it stays relevant to evolving trade and investment challenges. Shared interests in economic security, countering unfair competition, and promoting sustainability create space for deeper cooperation on trade rules and standards.<sup>38</sup> The EU could potentially contribute to the CPTPP’s review process, supporting incremental alignment and regulatory best practices in these areas. In other areas, an approach based on equivalence for regulations, aligning with internationally recognised norms rather than identical rules, offers a pragmatic way forward.<sup>39</sup>

## PROSPECTS AND RECOMMENDATIONS

- ▶ Full EU accession to CPTPP would integrate the EU fully into the agreement, consolidating existing bilateral free trade agreements with CPTPP members and automatically incorporating countries with which the EU lacks FTAs. It would significantly boost the EU’s ability to shape global trade rules and create one of the world’s largest trading blocs. However, recent experience highlight the difficulty of achieving such large-scale deals. The EU–Australia FTA remains stalled over beef and dairy access, while the EU–Mercosur agreement took two decades to negotiate and remains unratified mainly due to agricultural and environmental concerns. Despite its potential benefits, full CPTPP accession would entail high political costs within member states and require negotiations of unprecedented complexity, not least due to the size of the two blocs.
- ▶ **Enhanced structured cooperation** offers a more pragmatic path to tangible trade and regulatory gains without the burdens of full accession. Immediate measures could include non-aggression pacts to prevent new trade barriers, including in raw materials, mutual recognition agreements in critical sectors such as digital standards and green

technology, joint efforts to counter third-country trade distortions, and targeted arrangements on the cumulation of rules of origin.

- ▶ **While pursuing structured cooperation, creating a joint EU–CPTPP Dispute Settlement System** could address dispute resolution shortcomings in the WTO without requiring full trade integration. Expanding the Multi-Party Interim Appeal Arbitration (MPIA) into a permanent appellate system for EU–CPTPP disputes would fill the void left by the WTO Appellate Body. Politically, this could be framed as a temporary fix aligned with WTO rules and be linked to a broader economic security alliance.

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The evidence points to structured dialogue and cooperation on WTO reform, combined with expanded use of the MPIA, as the only realistic and timely way forward. For the EU, the strategic value lies less in full CPTPP membership, which would require prolonged negotiations with the possibility of failure, than in achieving a political alignment that reinforces its role as a central pillar of a rules-based trading order while preserving its strategic autonomy.

Aligning more closely with the CPTPP without formal accession would allow the EU to deepen trade cooperation with some of the fastest-growing economies of the Asia-Pacific without unduly alarming Washington or Beijing. Such an approach could strengthen governance frameworks built on high regulatory standards, while keeping WTO reform a long-term goal. The EU’s partnership with the CPTPP would thus be a calculated step to preserve a European ‘third way’ – combining strategic autonomy with an integrated, rules-based vision for trade in the Indo-Pacific and beyond.

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