Think

new things

Make

new connections

Conference Summary

Partnering with the Indo-Pacific:
how can the West best partner with
the fast-growing economies of the
Indo-Pacific to maximise global
economic growth, make progress on
the climate crisis and increase
shared resilience to shocks?

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DITCHLEY

EXECUTIVE SUMMARY

This conference considered the partnerships and frameworks that shape relations between Western countries and those of the Indo-Pacific – specifically India, Japan, Australia, the Philippines, and other countries in the wider region, including China.

Are existing partnerships working well enough to deliver on common interests in critical areas? These include global economic growth; support for greater resilience to shocks, (whether climate-related, geopolitical or technological); and support for the advanced technologies seen as essential to future prosperity and to the balance of power across international relationships.

Could there be better and new partnerships between the West and countries of the Indo-Pacific over joint development in, for example, AI, quantum and biosciences to support the technological progress needed? Do the current trade collaborations work well enough, and should there be explicit regional efforts to diversify and de-risk supply chains? In the context of a global energy transition, are there shared approaches to the development of green transition technologies and to energy security?

The starting point for this discussion was the recognition that many frameworks already exist and operate at different geopolitical levels and scales. These arrangements cover trade, security and conflict resolution, technological development, education and knowledge sharing, climate change mitigation, development aims and disaster response.

The question at the heart of this conference was whether these existing frameworks can steward future growth and security in ways that match changed geopolitical circumstances or whether new arrangements between Indo-Pacific countries and the West are now needed. For some, existing institutions could be adapted, while others felt that new and different arrangements were required to reflect the multi-polarity of global power.

Either way, there was agreement that the institutions of the post-World War II settlement were creaking and struggling to evolve. At the very least, there needed to be a change of mindset across these institutions to recognise the centrality of the Indo-Pacific to the future global economy and to global security. India and Indian leadership in the region and the world was a topic returned to several times during this conference.

So too, was a debate about the prioritising of national economic security by the United States in the context of competition with China. The US position was summarised as a new 'Washington consensus', replacing the post-World War II 'Washington consensus' that had set the context for postwar global trade to date. For some, this new consensus brought new risks with a trade-off between prosperity and security. For others, the new primacy of national interests allowed countries of the Indo-Pacific to move out of the hegemonic world of Western 'values' and to recognise and operate within a multi-polar world.

A focus on 'shared interests' and objectives between the countries of the Indo-Pacific and those of Western partners, as opposed to (Western) insistence on 'shared values', was seen as helpful. Greater pragmatism and a recognition that national self-interest is likely to shape all international and bilateral relationships was seen as a constructive starting point.

Context and why this was important

US-China competition, concerns about economic security, threats to global energy supplies and energy security set the context for this discussion about regional partnerships. There has been some retreat from the ambitions of globalisation, particularly over technological advances. How do

economic, geopolitical, technological, research and knowledge partnerships now support both global growth and security?

As the economic relationships between African economies and those of the Indo-Pacific are becoming more important, this conference picked up the central role for business and entrepreneurship, ideas discussed in Ditchley's October conference on 'Business in Africa'.

People

The conference brought together interests from India, Japan, Singapore, the Philippines, the United States, Canada and Australia and across sectors of national and global governance. Participants included experts and practitioners in diplomacy, technology, business, think tanks, politics and journalism.

Analysis

FULL REPORT

What is the Indo-Pacific?

The conference began with definitional challenges. What is the Indo-Pacific? Where does the region start and end? Do the smaller countries recognise themselves as part of it and, if so, what opportunities does a conception of the Indo-Pacific bring for them? The detailed answers to these challenges were secondary to a primary recognition that the economic, demographic and geographic significance of the region fundamentally changes geopolitics. The Indo-Pacific is ascendant and the immediate context for a still rising China (which prefers the term Asia-Pacific) and for greater integration with the Global South, alongside a focus on India as a dominant regional power.

Between 2000 and 2019, the Indo-Pacific was said to have accounted for 50% of global economic growth and 50% of energy flows. (By contrast, the EU was reported to have contributed only 10% of growth.) It is only logical for there to be more international focus on a region where there is huge potential for greater cooperation.

Along with geopolitical realities come technological challenges. Fundamental changes in geographies and techno-digital economies were considered to require new approaches to partnership, perhaps also reflecting generational differences and a shift in perspective from 'government' to 'industry'. A changed mindset is a necessary starting point for any (and all) new partnerships. Instead of framing the region from a post-1945, US perspective, it can be reframed to show the linkages across and within the region and with the rest of the world. Changing perspectives and transcending (already outdated) orthodoxies of global regions helps to envisage new kinds of partnerships and in so doing can help to deal with critical global issues. In this sense, the concept of the Indo-Pacific was considered to help challenge established thinking on global governance.

There were calls too for globalisation to be reimagined for the digital age. Such co-operation could support objectives for stronger supply chains, greater diversification of methods of production, and more openness about the role of technology within larger economic ecosystems. The Indo-Pacific was described as a necessary concept to manage globalisation in areas of technological growth. The setting of international norms and regulation of technology is at an early stage and many countries will want to incentivise their own AI companies to lead this race. The international community must therefore consider the context in which all countries can try to improve their own competitiveness in new technologies. Countries will have to work through these issues, not just in terms of safety or arms control, but eventually as the context for all international trade.

The Indo-Pacific, regulatory and economic frameworks

For new partnerships in the field of AI regulation, clarity is key. Three layers for new kinds of partnerships were outlined. The first is related to creation of chips or computer power, where there is limited competition (since one company currently dominates the market). The second layer is at the level of platforms, the operation of which are both commercial and geopolitical. The third layer is the provision of new services, and this, it was suggested, is likely to be the realm for initial international collaboration. A further set of distinctions separated emergent areas of AI. There are enabled big data analytics, generative LLMs and autonomous AIs. There will be a race to be the first mover in creating regulatory frameworks in all these areas.

More generally, the context for any new partnerships is the complex set of existing frameworks formed at different historical moments and driven from different geopolitical starting points (for example, Japan's long-term regional investment or Australia's engagement as the first country to coin the term Indo-Pacific). In recent decades, most of the major democratic blocs — the United States, the EU, the UK, Japan, Australia, Canada, France, and Germany — have rolled out Indo-Pacific strategies, with a broad range of bilateral programs on trade, investment, energy, connectivity quality infrastructure, and climate change and the green transition.

A business rationale for foreign investment has shaped much recent partnership. India and the larger countries in Southeast Asia are markets for economic growth, as well as sources of skilled and unskilled labour and manufacturing capability. Economic security has also motivated collaboration as countries such as India and several ASEAN nations are viewed as trusted partners for critical dependencies in building resilient supply chains. Geopolitics has added a strategic rationale for regional partnership. A strong India – economically and militarily – is generally considered to provide a balance or counterweight to China to ensure greater stability in the region and the world.

This existing policy framework (drawing on legacies of investment, economic arrangements and strategic geopolitics) was seen as remaining durable for the near term and usable as a context for countries seeking to accelerate innovation and economic development. Existing frameworks were characterised as operating in three areas: bottom-up, grassroots initiatives; hybrid public-private partnerships; and top-down government initiatives. Can these existing frameworks accommodate a rethinking of established norms, or are newer opportunities now emerging?

The bottom-up partnerships include many people-to-people arrangements offering educational and training programmes for students, young entrepreneurs, and professionals to increase skills and create networking opportunities, such as those led by the United States and India on Critical and Emerging Technologies (iCET) and Science, Technology, Engineering, and Maths ("STEM") talent exchanges and management training courses and university partnerships. A second set of bottom-up initiatives involves the creation of networks, incubators, and ecosystems of investors, business executives, and others to promote innovative projects.

Public-private partnerships in areas of critical and emerging technologies are in development with US government officials tapping into private sector expertise to establish the best policy framework for these new technologies. Financing is a feature of public-private partnerships, for example governments of the Quad countries (Australia, India, Japan and the United States) and elsewhere are coordinating across national development agencies as well as export credit agencies to support private sector investment in the Indo-Pacific. As part of its G20 leadership, India promoted blended finance mechanisms, which involve the strategic use of government funds to de-risk and stimulate private capital flows.

From the top down there are regulatory changes in both investor and recipient countries. For example, to support increased high technology defence, trade and even co-production abroad, countries such as the United States are seeking to ease export controls and streamline licensing processes in some areas, while clamping down in others. However, complex challenges exist even between close allies such as the United States, Australia and the United Kingdom with regulatory hurdles for example over advancing the AUKUS initiative. Given complexities across 'allies', this was said to be even more complex with countries seen not as close allies but rather strategic partners, such as India.

The strengths and weaknesses of existing frameworks were the subject of discussion. The OECD, described as a bastion of Western influence, suffers from a lack of clear unity among Western nations in policy formulation. Could existing institutions such as the Quad and AUKUS be made more effective and would this be preferable to creating new institutional frameworks? Leadership from the Quad is important but seen as an insufficient mechanism to engage the wider Pacific. The evolving landscape demands a rethinking of established norms and structures from diverse perspectives.

The conference broke into three Working Groups to discuss in more detail: shared strategies for resilient innovation and supply chains; the green transition and energy security strategies; and methods and frameworks for engagement.

Resilient innovation and supply chains

This group discussion reflected on the limitations within the WTO and its recent history, but the more recent turns towards economic security led by the United States dominated much of the discussion. The US policy experimentation in the Inflation Reduction Act and CHIPS Acts were considered prime examples of a confusing interplay between domestic policy and international economic policy. The key to this discussion was whether resilience and competition could be separated with some sectors (critical minerals, advanced batteries, APIs, hypersonic and semiconductors) considered to require diversification, while others needed better support to enhance competition. Creating effective policy interplay between these very different policy jurisdictions (technology and geopolitics) was described as difficult to achieve and core to current geopolitics. The dominance of the private sector in innovation and investment adds further complexity to multi-dimensional policy ambitions.

Clarity and adaptive capacity over the 'small yard, high fence' approach was called for, given that China is already ahead in some areas of technology and could retaliate if excluded. In addition, attitudes towards some frontier technologies, currently defined as technologies to be protected, may need to be revised as they become mainstream technologies. There was concern that actions taken to exclude China from key supply chains risk consequences that could make the West and rest of the world poorer. A contradiction was called out between US domestic policies pursuing protection of its middle classes whilst trying to incentivise allies to change trade policies.

A goal to optimise both growth and economic resilience is further challenged by the central role of corporate decision-making. Governments can only try to mitigate risk. The private sector wants to know how its investments will pay out and so the scope of policies such as export controls matters. In the defence sector the need for government-to-government frameworks was thought to be reasonably well defined and levels of control can be set for dual-use technologies. However, in areas like quantum and AI this scope has not been defined and there is overlap between sensitive and non-sensitive uses, a situation further complicated by innovation coming mostly from the private sector.

Ideas such as cross-country councils were proposed as forums to define what is truly sensitive. Could the number of sensitive technologies be defined and limited via consultation or negotiation between allied countries with 'small yard, high fence' policies created in tandem? However, this assumes that

national security concerns are shared across regions and countries. It is not evident, for example, that Europe should pursue national security as defined by the United States, over optimising regional economic growth.

On the other hand, failure to organise could also see Chinese hegemonic control increase in the Indo-Pacific region, so defining the economic offering in partnerships with the West is therefore essential. For Europe, improved focus on the Indo-Pacific may improve European competitiveness. Many countries prefer bilateral agreements, but a specialised approach to avoid unproductive competition was also suggested. There is no point, for example, in competing with China's trade with India in areas of base manufacturing. However, the UK and Japan are focused on exporting in very different areas e.g. auto or financial services and could therefore build on specialisations or technologies of the future.

There is a clear European offer for the Indo-Pacific to be developed. Europe has a large rich and developed market with significant pools of capital, science, university strengths, digital and energy transition skills. At same time, there are sensitive technologies for which IP should be protected. A broad European view is that it is best to keep a collaborative approach rather than 'too small a yard and too high a fence'. American policy is more rigid and there is concern amongst some in Europe that it will be pulled along by US momentum. The UK government's integrated review approach is viewed as a pragmatic middle ground with a focus on outcompeting rather than protectionism. The West cannot and should not undo China's strengths, but it can expand competitiveness.

India is central to the region's future but has not seen the same benefits as Western countries have from Chinese trade and is therefore cautious of multilateral arrangements. The key sectors for India are telecommunications, computing and IT. Here India was said to be opening doors to trusted partners in the West.

Overall, the discussions highlighted the complex interplay between global economic policies, technological advancements, the role of governments versus corporations, and the differing perspectives of nations like China, Europe, the United States, and India in shaping international trade and economic strategies.

The green transition and energy security

For the Indo-Pacific, a 'green transition' means transitioning away from a fossil fuel-based energy supply — but towards what? A range of potential energy sources (nuclear, solar, hydrogen and others) was explored, each with varying degrees of potential, but across all these the common themes were cost, an overreliance on technological support from China, relative weakness in relation to China (not just in technology but also in business practice), risks of technological leakage and the potential for dual use.

Despite continued reliance on fossil fuels (coal use in India is currently at 60%), the region was considered well placed to develop new energy sources, but this potential is tempered by very substantial questions not just of costs but also fairness. The concept of a 'just' transition dominated. Why should the prosperity of India, for example, be held back to ameliorate the climate damage caused by the industrialisation of Western nations?

The green transition was considered fundamentally to be about cost. At present the cost of solar is high and cost of Japanese solar technology, for example, was said to be a barrier. Transmission and distribution are the biggest cost in Southeast Asia and as a result there has been some turn towards 'off-grid' localised energy sources using solar. In South Africa there are many individuals and SMEs buying solar to use off the grid — could there be a similar story in Asia? What are the opportunities

for partnerships, technology transfer, debt cancellations and joint approaches to natural resources? The most promising renewable energy source for the region was thought likely to be solar, but there is no getting away from that fact that regional development of solar energy is largely dependent on China for technology. There are innovations in for example in UK-based solar technology, but the connections and collaborations are not being made at sufficient scale with partners in the Indo-Pacific.

Technology sharing with India was considered to have become more complicated since the Russia-Ukraine war. There was a discussion about the risks of technology sharing as all energy-related tech was said to have the potential for dual use. If geopolitics and borders harden, the parameters of what countries are willing to share will change. There are also issues bound up with the mining and refining of the critical minerals necessary for renewable technologies which could, aside from global competition for these resources, also have military implications. There is also concern over the prospect of extraction economies developing across African countries and what this might mean for longer term relations between the Indo-Pacific and the Global South.

The potential for much greater attention to nature-based solutions and restoration of coastal environments across many parts of the region was a focus for discussion. Satellite technology is already capable of monitoring the extent of environmental change and the benefits of restoring natural landscapes. The technology and expertise exist, yet the potential of these natural carbon sinks is underdeveloped because the relevant finance and leadership is lacking. What might be the right partnership framework to support action that could contribute much to the climate objectives of small island states?

There was interest in the potential for carbon pricing and a range of much newer technological solutions (i.e. hydrogen and potential uses of the ocean). But political questions associated with the energy transition dominated, namely the belief that regional economies should be allowed to develop and not be 'unfairly' held back. Western democracies have built wealth and power on the back of fossil fuels, so what does a 'just' transition look like for the Indo-Pacific?

Methods and frameworks for engagement

The frameworks for partnership and engagement in the Indo-Pacific region tend to focus on East-West dynamics, but the North-South dimension was considered under-developed. The key priorities include advanced technology cooperation, supply chain dynamics and establishing rules and norms. There is a divergence (East-West, North-South) between those prioritising security and those seeking economic prosperity. There was some optimism over the recent announcement (November 2023) of a tactical pause in competition between the United States and China and hope that, for example, better military-to-military contact might signify a greater desire for responsible management. Nevertheless, it was felt that a gap in understanding between the United States and China remained the context for the complexities of Indo-Pacific engagement. The priorities for the United States, Japan, the EU, Canada, and the United Kingdom must include extending cooperation with India to the broader Global South.

China's 'belt and road' initiatives (already a decade old) will evolve as China shifts toward digital infrastructure. The question for Western-led partnerships is whether credible alternatives to Chinese infrastructure can be offered. Connectivity, both global and regional, now inevitably links with geopolitics. Should the West mimic China or hold onto its strengths, promoting the private sector and increasing the commercial value of countries? Finding direction and leadership in engaging with the Indo-Pacific is crucial. Existing partnerships were considered in need of more guidance from regional leadership and Japan, Australia, and ASEAN are assuming some leading roles in this evolving landscape. What about the role of Indonesia, the Philippines, Sri Lanka, and others?

It was felt that the strengths of the private sector could be better leveraged. Infrastructure development such as ports, roads, bridges, rail, and satellite constellations could, cast in the right ways, become part of the green transition. Countries like Sri Lanka are collaborating with Japan to restructure debts, but these initiatives remain overshadowed by the scale of China's current investments. Common goals can be shared among nations in the ASEAN region with each country playing a different yet essential role, especially in advanced technology. Such arrangements were considered promising, and it was noted that the frameworks established now will significantly impact the Indo-Pacific's median and longer-term future.

Differences in priorities between the West and smaller countries in the Indo-Pacific can create mistrust. There is a sense that smaller nations with lower living standards are forced to prioritise the interests of larger countries, often sidelining their own needs. Partnerships that build prosperity across countries must therefore be a priority and the 'working group fora' that sit within the formal multi-lateral partnerships were thought to be able to incorporate such capacity.

There are questions about how AUKUS, incorporating a European component, could engage with other powers, like Germany, in an inclusive security dialogue over China. Unlike many international financial institutions, multilateral Development Banks (MDBs), including newcomers like the AIIB, remain robust, showcasing a greater willingness to disperse funds effectively; MDBs need to enhance their strategies.

The Quad could provide leadership in areas such as space, artificial intelligence, and quantum computing, where India and the United States excel. However, the Quad is still considered to be in its early stages and requires sustained political will in Washington to progress. Tangible progress is necessary for the Quad to maintain momentum. Focusing on climate, healthcare, critical minerals, and space could drive significant change. Digital Public Infrastructure is a mechanism for greater partnerships and seen as particularly promising because it can be adapted to various societal contexts and exported globally. Digital connectivity and platforms are strengths in the Indo-Pacific, offering opportunities, especially for India. Given its focus on infrastructure, quantum, AI, and expanding its reach into Asia and Africa, India could be crucial in driving progress.

Final discussion

Is the 'Indo-Pacific' a clear enough concept? It is a diverse and dynamic region and expected to be the region with the most economic growth in the short to medium term. But where does it start and end? Does the Indo-Pacific stretch from the east coast of Africa to the west coast of the United States? Should it be called Asia or Asia-Pacific (as China would prefer)? The smaller economies within the region do not necessarily recognise the Indo-Pacific framing. How could a concept of the Indo-Pacific be better communicated to those smaller economies seen to be part of it? How does the Indo-Pacific framing help those countries to solve their own domestic issues? Are there common issues that can be addressed at a regional scale? Western democracies need to understand how China has helped countries in the region solve their domestic problems. In the end, the smaller regional countries want the standards to facilitate trade and the functioning of markets to achieve greater prosperity.

The final conference discussion again challenged what was seen by some as the underlying premise of the conference. What's meant by the question of how the West can best partner with the fast-growing economies of the Indo-Pacific? Is it fundamentally about the West diversifying away from China? If so, then the argument was made that Western government systems are not structured in a way that could achieve such a goal. The objectives of 'competitiveness', it was argued, should not be mixed up by Western economies with those for greater 'resilience'. Do these two objectives requires separate strategies? At present, public policy systems were said not to have capacity for fundamental restructuring of supply chains. Even where some careful and modest reshaping of

supply chains is appropriate in the interests of national security, it was argued that such a strategy could risk damaging national economies.

There was a consistent call for a challenge to orthodoxy over the ways partnerships work. India was described as following its interests and taking an 'a la carte' approach to international collaboration in doing so. A pursuit of national self-interest is a move away from an expectation that 'shared values' are the basis for collaboration. Instead, countries might share objectives. A recognition of shared interests as opposed to shared values was argued to be a better pragmatic framing and the basis for better longer-term partnership frameworks.

The institutions of the post-war settlement were described as 'creaking' and by some as unable to evolve and adapt. Institutions are unwilling to cede ground or power whilst they're holding it. Others thought there was mileage in building better working relationships and partnerships within existing structures and that significant innovation could be achieved by doing so. Reforming mainstream institutions to meet the drive and innovation from the trade and business sectors at the grass roots is a current challenge. There is a significant unmet need for better facilitation of regional momentum and entrepreneurialism.

There must be more attention on what the countries of the Indo-Pacific want. A basic ask from the region is for a common set of standards around which trade can be organised. This would include for example, the operation of carbon markets, renewable energy and the manufacture of EVs. There is work to be done to make existing frameworks cohere into a systematic architecture to guide the development of partnerships across the Indo-Pacific.

Will the emergence of AI and the technological change it brings present a moment of clarity for the setting of common standards and norms? The 1648 peace treaties of Westphalia, the 1815 Congress of Vienna, and the 1945 establishment of the UN were all created after massive conflict. But it is also worth noting that the bases for these treaties were set by powerful victors and on their hegemonic terms. Nevertheless, Russia's invasion of Ukraine has forced clarity over the need to reorganise supply chains. If this challenge is not yet sufficient to drive greater clarity over the need for partnerships that deliver for current global crises, is global conflict becoming more of a threat?

Bilateral partnerships are the most likely pragmatic way forward and agreements include various levels of partnership. There are multiple powers to support the architecture needed for a free and open Indo-Pacific that is not trying to contain China. Specific challenges were made with regard to India's regional role. Why doesn't India take more responsibility for being a global power? India (it was suggested) does not have ambitions to be a great power, but rather holds a straightforward goal to grow and prosper. India's perspective is shaped by a view of history that sees Western wealth as built on fossil fuel use. Attempts to deny similar development opportunities to Indo-Pacific and Global South countries were described as unfair. This thinking is evident in regional approaches to climate change policy and to formulations for carbon taxes and pricing. Could these financial mechanisms work to redress past inequities?

Partnerships between the Indo-Pacific and the West are changing the frameworks of global power and the agency of nation states. In the post-war period, the agency of the world's individual countries was constrained within a global framework of power relation with very few globally powerful countries. But this framework of great power is shifting and the implications for states and alliances appears to be in flux. Alliances such as the EU are concerned about an ability to exercise global power in a changing global context. The US belief in its global power is an article of American faith and thought (by Americans) to be sustainable indefinitely. China is outwardly confident but inwardly less certain. The global framework of power relations is to be constantly remade and partnerships are

the means to create frameworks stable enough to allow the growth and economic expression of smaller regional countries and to connect more deeply to those in the Global South.

This Note reflects personal impressions of the conference. No participant is in any way committed to its content or expression.

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