



EUROPEAN POLICY ANALYSIS

Von der Leyen's Geopolitical Commission: Vindicated by Events?

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Summary

Since assuming office in 2019, Commission President Ursula von der Leyen has aimed to lead a 'geopolitical Commission'. This paper assesses the Commission's trajectory under von der Leyen's leadership, examining how its geopolitical ambition has evolved. Against a backdrop of global challenges and intensifying geopolitical rivalries, von der Leyen's Commission navigated crises such as the Covid-19 pandemic and the Russian invasion of Ukraine, instances that strongly influenced its policies and policy output. Drawing on academic literature, policy papers, media reports, and official documents, the analysis highlights key policy domains influenced by this shift and the Commission's response to external crises.

The analysis shows that initiatives connected to trade and industrial policy, in particular, have been developed in line with these ambitions. Moreover, the Russian war on Ukraine, and the EU's response to it, has strengthened the Commission's role within the policy field of security and defence. Looking ahead, factors such as transatlantic relations, enlargement debates, and internal reforms are likely to shape the incoming European Commission after the 2024 European elections. Moreover, balancing geopolitical ambitions with EU values and norms presents ongoing challenges, requiring careful navigation to safeguard the Union's identity.

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The opinions expressed in the publication are those of the author.

1. Introduction

When taking office in 2019, Commission President Ursula von der Leyen declared that she would lead a new “geopolitical Commission”. This outlined ambition sparked discussions on what it would mean for the Commission and its workings going forward (Haroche, 2023; Koenig, 2019). This European policy analysis aims to take stock of the Commission’s work during von der Leyen’s tenure in that regard. Additionally, it aims to outline and discuss how the Commission’s geopolitical ambitions have changed over these years and how this has affected the intra-institutional workings of the European Union.

In one regard, the proclamation of a geopolitical Commission could be seen as a logical continuation from President Jean-Claude Juncker’s (2014–2019) self-proclaimed ‘political’ Commission. Nevertheless, the outlining of a geopolitical Commission was also controversial, especially as issues connected to foreign and security policy are traditionally seen as the prerogative of the member states. Moreover, the concept is contested, and no common definition, especially in the EU’s case, has been established. However, as underlined by Gstöhl (2020):

Geopolitics lacks an agreed definition but can generally be understood as ‘great power rivalry’, which tends to view influence as a zero-sum contest of control over territorial (and increasingly also virtual) spaces, and does not separate economic from political or even military tools in this competition. (Gstöhl 2020, p. 1)

As we will see in this analysis, the Commission’s ambition to become a geopolitical Commission has been reinforced by external events and crises. In this regard, the Commission could be seen as having taken advantage of windows of opportunity and acted as a purposeful opportunist (Håkansson, 2023; Laffan, 1997; Nugent & Rhinard, 2015). Overall, we can observe during these years how the already ongoing great power rivalries, further fuelled by the Covid-19 pandemic, intensified the interaction between the Commission’s core areas of competence and foreign and security policy. In that regard, the heightened interconnection and interdependence among internal and external security domains have led to an expanded role for the Commission within EU foreign, security, and

defence policy (Håkansson, 2023; Lavallée, 2011; Niemann, 2016). Consequently, policy realms where the Commission traditionally possesses stronger competencies, such as trade and industrial policy, have become further intertwined with foreign and security issues, something that has also strengthened the Commission’s geopolitical claims during these years.

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To analyse the efforts of the von der Leyen Commission, this paper draws on academic literature, policy papers, media reports and official documents. The analysis proceeds as follows. The following section gives a short background on the von der Leyen Commission and its workings. This is followed by a section that outlines and discusses what the concept of a geopolitical Commission means. Moreover, this section discusses how external events and crises have only strengthened the Commission’s geopolitical role and ambitions. The fourth section aims to take stock of the Commission’s workings up to date, with a special emphasis on the policy domains most closely affected by its geopolitical turn. The final section sums up the overall assessment and looks forward to discuss how these developments can affect the next Commission’s workings after the next European Parliament elections.

2. Background

In terms of the Commission’s geopolitical ambitions, it is important to remember the backdrop of the process of electing von der Leyen, as she was not a Spitzenkandidat nominee and was proposed by the leaders in the European Council in a backroom deal. As underlined by Costa (2023, p. 109) ‘von der Leyen’s candidacy was given a cool reception, especially in the European Parliament (EP). Not only had the Spitzenkandidaten procedure not been respected, but the European Council was choosing a politician who had not taken part in the European elections, had never sat in the EP, and had limited knowledge

of the Union's institutions'. In the end, she was elected by the European Parliament with a slim majority. In that regard, she was seen as a weak president coming into office. Nevertheless, as will be elaborated on in this analysis, this view soon changed.

When taking office, the von der Leyen Commission outlined six flagship areas of focus for the Commission's tenure. In that regard, it followed suit from Juncker who had outlined ten flagship projects. Moreover, von der Leyen largely kept a hierarchical system (with some tweaking) within the college of Commissioners with strong vice presidents to steer the policy agenda (Bassot, 2020; Kassim, 2023b). However, she also added three Executive Vice-Presidents in charge of its foremost priorities: the European Green Deal, an economy that works for people, and a Europe fit for the digital age. Besides these overarching policy goals, the von der Leyen Commission outlined promoting 'our European way of life, a stronger Europe in the world, and a new push for European democracy' as its other three focus areas.

To strengthen the geopolitical role of the Commission further, the new Group for External Coordination (EXCO) as a form of a collegial preparatory body was established within the College of Commissioners. This group was to be co-chaired by the Diplomatic Adviser of the President and the Deputy Head of Cabinet of the High Representative/Vice-President and was meant to bring 'together all Cabinets to prepare the external aspects of College meetings on a weekly basis and ensure full political coordination and coherence on external action matters'. Moreover, the purpose was that it would 'better align the internal and external aspects of our work and enhance the working relationship between the Commission and the European External Action Service' (European Commission, 2019, p.14).

3. The Geopolitical Commission Meets Reality

Before analysing the results of the geopolitical Commission, one must first try to define and discuss what the concept implies. Von der Leyen herself declared early on that it implied that the 'European Union needs to be more strategic, more assertive and more united in its approach

to external relations'. Moreover, she highlighted the need to 'strengthen the Union's capacity to act autonomously and promote its values and interests around the world', and in that regard 'better link the internal and external aspects of our policies' (von der Leyen, 2019a, p. 5). The ambition was thus to enhance and strengthen the co-ordination of the Commission's work with external bearing (Haroche, 2023). Moreover, the EU's crisis-torn decade and the increasingly hostile environment strongly influenced this framing from the Commission's side (Håkansson, 2023; Haroche, 2023). Assuming office against the backdrop of worsening transatlantic relations during the Trump presidency, escalating China-US rivalry, and a hostile Russia in its neighbourhood all played a significant role in shaping this context. In their evaluation of the von der Leyen Commission, Lorenzani and Szapiro (2023) argue that, having assumed office as a non-Spitzenkandidat, von der Leyen also employed the concept of a geopolitical Commission to establish legitimacy.

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Early on, analysts also suggested that the Commission's geopolitical shift could be more accurately seen in the context of a geoeconomics perspective. As highlighted by Helwig (2019), the von der Leyen Commission could rightly be labelled as a 'geoeconomic' one, given that the 'focus of her presidency comes at a time of increased global competition in the economic sphere and poor performance in respect of the EU's traditional diplomacy' (Helwig, 2019, p. 2). Throughout its tenure, these issues have also increasingly taken centre stage in the European political agenda.

While external events could be perceived as creating constraints for Juncker's political Commission, the opposite argument could be made for the von der Leyen Commission (Dawson, 2019). In this regard, the following analysis outlines and argues that the crises have influenced the geopolitical

role of the Commission's tenure. While this was not evident from the outset, the von der Leyen Commission and its leadership has arguably used external crises to strengthen its competences in several policy fields (Håkansson, 2023). In fact, the incumbent Commission has largely been in crisis mode since the beginning of its mandate. Within the first 100 days, the Covid-19 pandemic broke out, significantly impacting its trajectory. Nevertheless, it is noteworthy that the Commission chose to double down on its established priorities in response to the pandemic. Thus, in addressing the challenges posed by Covid-19, the Commission actively advanced both the Green Deal and Digital Agenda (as will be further elaborated on).

The pandemic also served as a catalyst or accelerator for already existing geopolitical and geo-economic tensions in world politics. It intensified Sino-American rivalry, a trend that has persisted from the Trump years into the current Biden administration in the US. Consequently, we witnessed the escalating and increasing weaponization of issues related to trade and technology (Farrell & Newman, 2019). The concept of (open) strategic autonomy in that regard experienced a resurgence after the pandemic, influencing policy outputs from the EU's side (European Commission, 2021; Helwig & Sinkkonen, 2022; Lewander, 2021; Tocci, 2021). However, the heightened focus on geoeconomic issues in world politics also meant that policy areas where the Commission has stronger competencies, such as in trade and industrial affairs, became even more entangled in foreign and security policy matters. As argued by Wolff et al. (2021, p. 16), today, 'economic interests are blurred with military or security goals, especially in strategic sectors such as cyberspace, finance, strategic materials and components, and control of critical digital infrastructure', something that clearly has affected the political and policy role of the Commission during its term.

After emerging from the pandemic in a rather impressive manner, as will be elaborated on in the next section, Europe faced its next crisis. In February 2022, the Russian illegal full-scale invasion of Ukraine marked the return of war on the European continent. This backdrop of external events and existential crises for the Union has significantly influenced both the policy context and

the output of the von der Leyen Commission. The next section of this analysis will outline and discuss some of the new policy initiatives that can be said to impact and reflect the Commission's increasingly geopolitical role.

4. Taking Stock of the Commission's Work

In terms of legislative outcomes, despite the challenging backdrop of external events and crises, the Commission has worked relatively well in introducing new proposals. As of the autumn of 2023, the Commission had announced 610 initiatives, encompassing both legislative and non-legislative issues across all policy areas. In terms of its priority area of a stronger Europe in the world, the Commission had, by the autumn of 2023, proposed 69 different initiatives (Bassot, 2023).

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A detailed analysis across the six priority areas of the von der Leyen Commission reveals that over one-third of the announced initiatives have been formally adopted, with nearly another third progressing normally through the legislative process (Bassot, 2023). Examining the matters related to external relations, the incumbent Commission inherited certain files from the Juncker Commission and has persistently worked on them. However, other initiatives have been significantly influenced by external events and crises. The following section aims to outline and discuss a number of new initiatives and proposals launched by the Commission, assessing how they have impacted the geopolitical role of the European Commission. In that regard, this analysis argues that the crises have been an important factor in shaping and pushing forward a more geopolitical agenda from the Commission's side.

4.1 The impact of the Covid-19 pandemic

As underlined in the previous section, the von der Leyen Commission was faced early on during its mandate with the Covid-19 pandemic, an

exogenous crisis that shocked Europe. The EU as a political system, including the Commission, could be seen as reacting slowly at the start of the pandemic. As the virus spread in Europe, the lack of a response from the EU side attracted attention, especially in strongly affected countries such as Italy and Spain. Yet after the slow start, the Commission acted to respond to the crisis. Among other things, it worked to loosen up rules within the Stability and Growth Pact as well as state-aid restrictions to help member states to finance their response to the pandemic. The Commission also strengthened its role within EU health policy in response to the Covid-19 pandemic (Boin & Rhinard, 2023). However, its greatest achievements could be seen with the joint procurement of vaccines and the establishment of the Next Generation EU recovery fund (Alcaro & Tocci, 2021; Kassim, 2023a). Both these initiatives—and the Commission’s role in pushing them forward—should be seen as highly significant and historic given the Commission’s limited role in EU health policy and the hesitancy among several member states to take up joint debt (Alcaro & Tocci, 2021). Nevertheless, in terms of the Next Generation EU recovery fund, the results are mixed regarding the influence of the Commission on the set-up of the fund (see, for example, Krotz & Schramm, 2022; Smeets & Beach, 2023a; Tesche, 2022).

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Nonetheless, the Commission used the situation to push for utilising the recovery fund to strengthen its already established priorities with the Green Deal and the digital transformation. In that regard, in the final version of the agreed €750 billion Next Generation EU package, 37 per cent was earmarked for the European Green Deal and 20 per cent to digital transformation. This could generally be viewed as a situation where the Commission acted to strengthen its political role and it has been argued that ‘where European institutions had clear authority, they exercised

it’ (Anghel & Jones, 2023, p. 770). While the Covid response mainly had internal effects on the Union, it also demonstrated an increasingly active Commission and a stronger Commission President than many had predicted. Moreover, it also had a clear external element as it showed Europe’s vulnerabilities in its supply chains and the lack of important critical products, among other things. Subsequently, the EU started to work more closely on these issues and, as a result, the Commission outlined in the 2021 Trade Policy Review that due to geo-economic tensions, increasing global uncertainties, the rise of China and the fallout from the Covid-19 pandemic, the EU needed to strengthen its resilience. The Commission also emphasised the need for the EU to leverage its trade policy to advance its geopolitical interests (European Commission, 2021a).

4.2 Open strategic autonomy in EU trade policy

The development described above led to the introduction of several new policy initiatives by the Commission in recent years. While some were inherited from the Juncker Commission, others have emerged in response to the external environment and threats. In its 2021 Trade Policy Review, the Commission overall highlighted that the Union will ‘need to operate in a new multipolar global order marked by growing tensions between major players’ (European Commission, 2021a, p. 8). This recognition also gave rise to the new concept of ‘open strategic autonomy’ in its trade policy. The notion of strategic autonomy originated in the European foreign, security and defence policy debate, but today it is seen as having a broader meaning, encompassing trade and economic policy, industrial policy, health issues, climate and digitalisation (Gehrke, 2022; Helwig & Sinkkonen, 2022; Lewander, 2021; Tocci, 2021). In this context, the EU’s trade policy has arguably been reshaped to take into account global trends and challenges, aligning with its ambition outlined in the ‘a stronger Europe in the world’ section of the von der Leyen Commission’s political priorities. Thus, the Commission outlined in its 2021 Trade Policy Review that:

A stronger and more resilient EU requires joined up internal and external action, across multiple policy areas, aligning and using all trade tools in support of EU interests and policy objectives

[...] ‘Open strategic autonomy’ responds to this need. Open strategic autonomy emphasises the EU’s ability to make its own choices and shape the world around it through leadership and engagement, reflecting its strategic interests and values (European Commission, 2021a, p. 4).

The added notion of an ‘open’ strategic autonomy reflects the still liberal-minded Directorate-General for Competition under the leadership of Commissioner Margrethe Vestager. Nevertheless, the Commission has developed several new tools with external and geopolitical implications. Gehrke (2022) assesses that the EU, and the Commission, has in recent years developed instruments to tackle economic distortions, defend itself against economic coercion, and improve and enhance critical infrastructure and supply chain resilience, as well as new instruments linked to the Union’s values and sustainability. This includes new tools in the EU’s trade defence toolkit such as the Anti-Coercion Instrument (ACI), the EU’s Carbon Border Adjustment Mechanism (CBAM), the EU’s Foreign Direct Investment (FDI) regulation (adopted under the former Commission and in force under the incumbent), new export control measures, and the Commission’s proposal for a Critical Raw Materials Act, among other things (Gehrke, 2022; Helwig & Wigell, 2022; Olsen, 2022).

4.3 A new turn in EU industrial policy

The EU, and the Commission in particular, has also, as a consequence of the pandemic and increasing geopolitical rivalries, pursued a more active industrial policy. In the last couple of years, the Commission has proposed and launched several new initiatives and tools, including updating its industrial strategy, developing and launching the European Chips Act, advancing the number of Important Projects of Common European Interest (IPCEI) and proposing the Net Zero Industry Act and the Strategic Technologies for Europe Platform (STEP) initiative (European Commission, 2021b; McNamara, 2023; Seidl & Schmitz 2023). Both the Net Zero Industry Act and the STEP initiative should be seen in the light of and partially ‘spurred by the shock of the Russian invasion, geopolitical tensions and the challenge presented by the US IRA’ (the 2022 Inflation Reduction Act) (Tagliapietra et al., 2023, p. 2; see also McNamara, 2023). Moreover, since the pandemic and as a

consequence of the economic downturn caused by Russia’s full-scale invasion of Ukraine, the Commission has relaxed the state aid rules within the Union. However, this has also been criticised for skewing the market. An analysis using the adopted Temporary Crisis Framework (TCF)/ Temporary Crisis and Transition Framework (TCTF) (adopted after Russia’s full-scale invasion of Ukraine) shows that Germany and France have received around 70 per cent of the total state aid approved by the Commission (Euractiv, 2023).

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Overall, it could be said that the EU and the Commission through both its new trade policies, under the auspices of the ambition of open strategic autonomy, and its new industrial policies is changing its mindset and pursuing a more geopolitical economic strategy. Kathleen McNamara, for instance, outlined that the EU is now ‘pursuing a visibly interventionist European industrial policy and geopolitical strategy’ (2023, p. 1). In turn, Schmitz and Seidl (2023) outline that the ‘geopoliticization of trade in particular has changed the Commission’s view about how to best serve European interests’ (p. 834) and argue that its use of the concept of open strategic autonomy ‘does not completely break with neoliberal ideas of open(ing) markets, [though] it constitutes the most significant challenge to and departure from these ideas so far’ (p. 841). In 2023, the Commission and the European External Action Service (EEAS) also launched a new economic security strategy, which underscores that:

With geopolitical tensions rising and global economic integration deeper than ever before, certain economic flows and activities can present a risk to our security [...] New geopolitical and technological realities requires us to adapt our approach, preserving the vast majority of Europe’s highly valuable economic links to the world while ensuring that the new risks we face, which are narrow but critical, are effectively tackled (European Commission and HR/VP, 2023, p. 1).

Thus, it could be argued that ‘the new geoeconomics reality is changing the European Commission’s mindset, as shown by its stronger willingness to throw the EU’s economic and regulatory weight behind its actions in global politics’ (Helwig & Wigell, 2022, p. 3). In other words, within these policy fields we are clearly seeing the effects of the geopolitical Commission and the ambitions stemming from it. For instance, Garcia-Duran et al. (2023) assess that the new trade and industrial tools give the Commission significant authority, solidifying EU trade practices within the framework of power politics (see also Matthijs & Meunier, 2023); and, as Hoeffler (2023a, p. 9) argues, ‘the recent European Economic Strategy testifies to the growing entanglement of economic and security logics in EU policies’.

4.4 Change and continuity in the EU’s security and defence policy

In terms of the traditional field of security and defence, Alcaro and Tocci (2021, p. 1), in their assessment of the EU’s response to the Covid-19 pandemic, conclude that ‘foreign and security policy is the one area in which Covid-19 has failed to trigger a thrust towards deeper cooperation.’ However, this policy area was soon also to be affected by external events and crises, namely Russia’s full-scale invasion of Ukraine, as elaborated on below. Yet, the ambition to strengthen the Commission’s role within the area of EU foreign, security, and defence policy was something that von der Leyen inherited from the Juncker era (Håkansson, 2023; Haroche, 2023).

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As already mentioned, the von der Leyen Commission has followed on from the new ambitions set by the Juncker Commission, continuing to bolster its role in the EU’s security and defence policy. Upon taking office in 2019, the Commission made a strategic decision to launch a dedicated Directorate-General for Defence

Industry and Space (DG DEFIS) to manage the defence policy initiatives initiated by the Juncker Commission. The establishment of a dedicated DG for these issues unequivocally signals the increasing importance of this policy area (Nugent & Rhinard, 2015). Under the current Commission, the European Defence Fund was finally established in 2021, following its development by the Juncker Commission (Håkansson, 2021; Hoeffler, 2023b). Another noteworthy development in EU foreign, security and defence policy during this period was the creation of a new Strategic Compass for Security and Defence. This ‘white book’ exercise for the Union was developed by the European External Action Service in collaboration with member states over a two-year period up to 2022 (Sus, 2023). However, it also implied a greater role for the Commission within the policy field, addressing areas where the Commission held competences, including cybersecurity, economic security, and its competencies in trade and industrial policy (as elaborated above). Moreover, established initiatives such as the European Defence Fund and its space policy initiatives have contributed to enhancing the Commission’s influence in the Compass process (for a more detailed discussion on this, see Håkansson, 2022). The increased influence of the Commission was also highlighted by officials from both the EEAS and the Commission closely involved in the working process of the Compass (Håkansson, 2024). Moreover, several of the new defence-industrial initiatives developed later on were built on the ambitions within the Compass (see below).

4.5 The impact of the Russian war on Ukraine

The biggest push for foreign, security and defence policy integration came after the Russian full-scale invasion of Ukraine in February 2022. Described as ‘a tectonic shift in European history’ by the heads of state and government in the European Council, or as a ‘watershed moment for our Union’ by President von der Leyen, it underscored the dire situation Europe faced (European Commission, 2022b; European Council, 2022). Just weeks after the full-scale war started, the leaders in the European Council put forward the Versailles declaration outlining new ambitions for their defence, industrial and energy policy. Among other tasks, the leaders assigned the Commission and the European Defence Agency (EDA) to provide an analysis of defence investment gaps

and propose further initiatives to strengthen the defence industrial and technological base in Europe (European Council, 2022), a task that was also incorporated in the EU Strategic Compass. In that regard, the Commission and EDA returned with proposals that highlighted the necessity for increased European collaborative initiatives and shared procurement efforts (European Commission and HR/VP, 2022).

Subsequently, the Commission first proposed the new European Defence Industry Reinforcement through the Common Procurement Act (EDIRPA) to support joint procurement in the EU. This instrument is intended to run from 2023 to 2024, with a limited budget of €300 million (Council of the European Union, 2023; European Commission, 2022a). Later on, also after a push from the leaders in the European Council, the Commission developed the €500 million instrument Act in Support of Ammunition Production (ASAP) to ramp up its production capacities in ammunition and missiles in Europe. Both of these initiatives are noteworthy given the member states' earlier reluctance to give the Commission a stronger role in defence procurement matters (for a more extensive discussion on the development process, see Håkansson, 2024). Building on these new initiatives, the Commission has also launched a new EU Defence Industrial Strategy in 2024, including a new European Defence Investment Programme (EDIP), drawing upon the experience of the EDIRPA and ASAP initiatives (European Commission, 2023b). However, there has also been some pushback and resistance from member states on giving the Commission a greater role and competences within the policy field of defence-industrial cooperation (Fiott & Simón, 2023; Politico, 2023a), underscoring how sensitive this policy field still is.

The Commission has also arguably taken on a stronger role than anticipated in responding to the war on Ukraine. This includes the above-mentioned new defence-industrial initiative as well as its role stemming from the EU Strategic Compass. However, it also took a central and new role in the process of developing the different sanctions packages against Russia after the war. Especially von der Leyen and her cabinet were closely involved in this process, and they were a

very important node in coordinating the response with the US and other important G7 partners (Håkansson, 2024). Moreover, Baracani (2023, p. 1467) has shown that President von der Leyen's important 'ideational agenda-setting leadership shaped the EU's response to the crisis that followed the Russian full-scale military invasion of Ukraine'. In that regard, she assesses that 'President von der Leyen, in line with her geopolitical Commission, has played a very active foreign policy role. In particular, to be recalled is her relationship with President Biden, for whom she has become the EU's interlocutor'.

'The Commission has also arguably taken on a stronger role than anticipated in responding to the war on Ukraine.'

The war in Ukraine has also pushed forward the enlargement process again after a long period of 'enlargement fatigue' in the Union. Just a few days after the war started, von der Leyen declared that Ukraine is 'one of us, and we want them in' (Politico, 2022). Furthermore, in terms of economic support for Ukraine, the Commission could be seen drawing on its experience from the Covid-19 pandemic with the setup of the Next Generation EU and the SURE packages when establishing the macro-financial support for Ukraine (the MFA+) (European Commission, 2023a; Fabbrini 2023). Fabbrini (2023, p. 55) even argued that 'the EU's financial response to the war in Ukraine in 2022 reveals a trend towards the consolidation of fiscal capacity in the EU'.

4.6 Energy policy and Russia's war in Ukraine

Even before Russia's war in Ukraine, the EU was faced with rising energy prices across Europe. However, these issues became even more pressing after the war started. Thus, ahead of the informal European Council Versailles summit, the Commission presented its first REPowerEU communication in March 2022 to address the energy crisis, mainly through increasing renewable energy sources and supporting increased energy efficiency in Europe. After intense discussions in the European Council as well as hesitancy within the Commission, the Commission nevertheless

launched a Market Correction Mechanism (price cap) proposal in November 2022 to mitigate energy price hikes in Europe (Smeets & Beach, 2023b). Siddi (2023, p. 100) also assesses the REPowerEU plan as:

While the European Commission carefully worded the Plan as an instrument to accelerate the energy transition, in the short term the policy of phasing out Russian fossil fuels and the decrease in Russian gas supplies led to a switch from gas to coal in some contexts, and especially to a rapid increase in imports of liquefied natural gas (LNG) over long distances.

While reducing dependency on Russia, the initiative could thus be seen in part as an obstacle for the green transition, as well as something leading to increasing dependencies on other (mainly LNG) suppliers. In general, the Russian war in Ukraine has led the EU to shift from broader energy cooperation to a narrower and more strategic group of partners in terms of energy supplies. In fact, Siddi and Prandin (2023) show that the Commission shifted its focus from the more multilateral approach in its Green Deal initiative to a more geopolitical and strategic outlook, in particular through initiatives like the REPowerEU plan, the Critical Raw Materials Act, and the Net-Zero Industry Act. Overall, the authors show that ‘the EU’s policies for a green energy transition have taken a decisive geopolitical turn following the Covid-19 crisis and particularly Russia’s attack on Ukraine in February 2022’ (Siddi & Prandin, 2023, p. 293).

‘[...] the Russian war in Ukraine has led the EU to shift from broader energy cooperation to a narrower and more strategic group of partners in terms of energy supplies.’

4.7 Multilateralism in crisis

Another focus in von der Leyen’s 2019 political guidelines was the strengthening of multilateralism. In the latter, she declared that multilateralism ‘is in Europe’s DNA. It is our guiding principle in the world. My Commission will keep on championing this approach and ensure that we uphold and

update the rules-based global order’ (von der Leyen, 2019b, p. 17). Yet, the state of multilateralism in the world can be described as in crisis, which already served as a backdrop when the von der Leyen Commission took office. The multilateral world order was also strongly affected by the Covid-19 pandemic, with the utilisation of vaccine diplomacy and increasing geopolitical tensions. Recent studies have shown that the EU developed a more geopolitical outlook in its development policy through the Team Europe approach in response to the pandemic and the escalating tensions in world politics (European Commission and HR/VP, 2020; Koch et al., 2024). The development of the Team Europe approach has generally been attributed to the Commission, and a key driver for its creation was geopolitical considerations. The pandemic created a situation in which the EU felt it needed to expand its scope and to demonstrate visibility of its support in partner countries, particularly in light of the geopolitical competition with China (Koch et al., 2024, p. 15). By 2021, the Commission had also launched a new Communication to strengthen the EU’s contribution to rules-based multilateralism, promote global peace and security, and defend human rights and international law (Kassim, 2023b).

To protect the multilateral order, it has been argued that the EU over time entered into survival mode on multilateralism. In that regard, Schuette and Dijkstra (2023) show in recent research that the EU has been quite effective in defending specific multilateral institutions under threat these past few years; however, the Union has been less effective in trying to reform or extend multilateral institutions at the same time. Moreover, both the Russian war in Ukraine and the Gaza conflict following the Hamas attack on Israel in October 2023 have highlighted the differences between the West and other international actors to a greater extent. These aspects are likely to impact multilateral cooperation going forward.

In addition—and connected to its plan to strengthen multilateralism as well as to rival China’s Belt and Road framework—there is the EU’s new Global Gateway initiative. The Global Gateway is an initiative that intends to allocate €300 billion in public and private financing by 2027 for global infrastructure development. Unveiled in von der Leyen’s 2021 State of the European Union address,

it has been seen as a flagship connectivity initiative to counter China's Belt and Road framework (Politico, 2021). Heldt (2023), in her assessment of the Global Gateway, outlines how the rise of China as a global infrastructure financier, together with strong and entrepreneurial leadership from the Commission, clearly pushed forward this initiative. She concludes that the 'Global Gateway marks a geopolitical turn in EU politics through which the EU can project its power in the world' (p. 230). Yet, while it has taken an ambitious approach and has been argued to mark 'a real shift in the approach to partners in Africa, Asia-Pacific, and Latin America and the Caribbean', it is still uncertain if the €300 billion investment target could be met (Teevan & Bilal, 2023, p. 2). Nonetheless, the project shows a new connectivity approach from the Union's side, something also underlined in its 2021 EU strategy for cooperation in the Indo-Pacific (Biscop, 2020; European Commission and HR/VP, 2021).

'The Global Gateway [...] has been seen as a flagship connectivity initiative to counter China's Belt and Road framework.'

4.8 Relationship with other powers

The Union's China policy has also changed under the incumbent Commission. This is a relationship that has often been seen as Janus-faced, and even before the current Commission took office, the EU had described China as simultaneously a negotiation partner, economic competitor, and systemic rival (European Commission and HR/VP, 2019). Yet early in its mandate, the von der Leyen Commission, with clear backing especially from Germany and France, sought to push forward with the Comprehensive Agreement on Investment (CAI) with China. However, the rush to complete the agreement in 2020 was soon criticised for not being coordinated with the incoming Biden administration in the US. In the end, the deal was also halted in the European Parliament after MEPs and EU citizens had been sanctioned by China (European Parliament, 2021; McElwee, 2023).

However, as a result of the pandemic and increasing rivalry between China and the US, the EU and

the European Commission have also taken a more critical outlook on the relationship with China over time. In a keynote address on EU-China relations in the spring of 2023, President von der Leyen outlined:

And we know there are some areas where trade and investment poses risks to our economic and national security, particularly in the context of China's explicit fusion of its military and commercial sectors. This is true for certain sensitive technologies, dual-use goods or even investment which comes with forced technology or knowledge transfers. This is why—after de-risking through diplomacy—the second strand of our future China strategy must be economic de-risking. (European Commission, 2023c)

The speech clearly underlined that Europe does not seek to decouple from China. Nevertheless, it took a more critical outlook on the relationship with China than before, especially in terms of economic security issues. The transatlantic relations on this have been noticeable, where senior White House officials, like National Security Advisor Jake Sullivan, have also started to use the concept of de-risking from China following the speech by von der Leyen (Benson & Sicilia, 2024; White House, 2023). However—and this is something this analysis will come back to in the conclusions—several member states have been increasingly critical of the more active and hard-line Commission on these issues. There have been internal divisions within different parts of the Commission, too, with different opinions on the more assertive trade, tech and industrial policies pursued by the Commission. Nonetheless, the effects and lessons from the pandemic clearly implied a renewed focus on balancing different interdependences, which we can see in terms of the relationship with China.

In terms of the US, and after the tough Trump years, the EU tried to get a fresh start with the new Biden administration. However, as underlined before, the relationship got off to a rough start when the incoming US administration criticised the EU for pursuing the CAI agreement with China and not coordinating the issue with the US. The relationship has greatly improved over time, however, especially in response to the war in Ukraine. Von der Leyen and her team have in that regard been in very close contact with the

US administration to coordinate the transatlantic response (Håkansson, 2024; Politico, 2023b).

Another aspect with both external and internal implications for the EU has been Brexit. The von der Leyen Commission inherited the issue, and in 2023, the Commission reached a deal known as the Windsor Agreement with the UK (European Commission, 2023d). The new framework and its development process could, in that regard, be viewed as a continuation of the Juncker Commission's approach to handling Brexit issues (Laffan, 2023; Schuette, 2021). Moreover, over time, the relationship between the EU and the UK has improved. This improvement has also been facilitated by the strong coordination between the UK and the EU in response to the Russian war on Ukraine (see also Martill & Sus, 2024).

5. Conclusions: Looking Back and Looking Ahead

This analysis has shown that during its mandate, the Commission has evolved and taken on a larger geopolitical role than many anticipated. However, it has also been a Commission that has clearly been affected by crises, influencing different initiatives and responses. According to Kassim (2023b, p. 180), in an initial evaluation of the early years of the von der Leyen Commission, it was noted that, overall, the Commission has demonstrated rather impressive results. However, he also notes the increasingly strained relationship between the Commission President and her counterpart in the European Council. Haroche (2023, p. 970), in turn, commented that 'the geopolitical Commission should be understood as the result of the interactions between exogenous factors—the intensification of global power competition and the rise of geoeconomic strategies—and endogenous factors, such as the rivalry between the Commission and the European External Action Service and the functional link between the Commission's economic powers and international security issues.'

I argue that overall, in terms of its ambition to become a geopolitical Commission, the von der Leyen Commission could be seen as having, on balance, quite an impressive result. This has been clearly influenced by both an unstable (and even hostile) environment and a crisis-driven agenda, as well as—surprisingly—by the strong leadership

of the Commission president given her initially weak mandate upon taking office. However, these results also imply new questions for the workings of the Union going forward, and the incoming new Commission after the 2024 European elections, especially if the crisis-torn context continues.

'[...] we will continue to see a European Commission that is active in dealing with security policy and, more broadly, strategic considerations in a range of policy areas.'

This analysis nevertheless assesses that we will continue to see a European Commission that is active in dealing with security policy and, more broadly, strategic considerations in a range of policy areas. This is largely due to the fact of increasing policy entanglement between issues connected to foreign and security policy and policies traditionally pertaining to the Commission's competences, including trade, economic policy and internal market policies. However, there are several aspects that could affect the work ahead.

Firstly, the leadership of the Commission matters. As highlighted, von der Leyen was initially perceived as a rather weak president when she assumed office. However, this perception has evolved during her mandate, significantly influencing its operations. Von der Leyen has adopted a hands-on approach to her work to develop various new initiatives. In this respect, the Commission has maintained a presidential structure since the 2014–2019 Juncker Commission, with a top-down management approach (Brooks & Bürgin, 2021; Nugent & Rhinard, 2015). Kassim (2023b, p. 188) concludes that 'the fact that von der Leyen has been able to emulate Juncker suggests that the powers of the presidential office have, to a large extent, become institutionalised'. Similarly, the primacy of the President's cabinet over other Commissioners' cabinets has persisted from the Juncker Commission to the current von der Leyen Commission (Kassim & Laffan, 2019). Additionally, the strengthening of the Secretariat General within the Commission has continued since the Juncker Commission, something also

influenced by the crises the Union has faced in recent years (Brooks & Bürgin, 2021; Giurcanu & Kostadinova, 2022; Kassim & Laffan, 2019; Lehne, 2022). However, this expanded role for the Commission and its president has, at times, strained relations with other European institutions. Under the current Commission, occasional tensions have surfaced in relations with the European Council and its leadership (Haroche, 2023; Kassim, 2023a; Lorenzani & Szapiro, 2023; Nováky, 2021). Additionally, similar challenges in relations have been observed at times with the EEAS and the EDA (Haroche, 2020). Furthermore, criticism has been directed towards the ‘von der Leyen approach’ within the Commission, where she relies on a small group of officials in her own cabinet (Financial Times, 2023; Håkansson, 2024). This leadership style could potentially lead to both internal issues within the Commission and intra-institutional challenges ahead.

Secondly, divisions within the Union also persist on issues such as China policy and the EU’s new assertive stance on trade, economic, tech and industrial policies. Furthermore, the lack of consultation—both with member states and internally within the Commission—regarding new policy initiatives has been identified as a problem under the current leadership. In the spring of 2024, we have seen the introduction of new initiatives, including the new economic security package and defence-industrial initiatives. These could spark new discussions and tensions within these policy domains. We can also anticipate that enlargement issues will be at the forefront of policy discussions for the next Commission. There are evident geopolitical considerations in the current enlargement process, and discussions on internal reform are also expected to intensify during the upcoming Commission mandate (Costa &

Schwarzer, 2023; von Sydow and Kreiling 2023). These issues are likely to impact and influence the incoming Commission significantly.

Thirdly, a factor likely to influence the next Commission is the transatlantic relationship, particularly with a looming US election. The Biden administration has generally collaborated closely with the von der Leyen Commission, despite occasional hiccups, such as the lack of coordination during the US withdrawal from Afghanistan or the US IRA package. Nevertheless, this relationship has notably strengthened during their tenures; however, a new US administration could impact future collaborations. Additionally, the ongoing war in Ukraine and the crisis in the Middle East are expected to persist, significantly influencing the work of the next European Commission.

‘We can also anticipate that enlargement issues will be at the forefront of policy discussions for the next Commission.’

Finally, and more broadly, the more geopolitical role of the Commission could also have its pitfalls. As highlighted by Bargués et al. (2023, p. 2283), ‘by turning into more of a geopolitical actor, the EU might also be putting at risk some of the key foundations of the LIO [the liberal international order] and its own identity as a liberal actor.’ With geopolitical considerations likely to remain at the forefront for the new European Commission in 2024, these aspects need to be taken into account. In that regard, the Union also needs to tread carefully in its quest to become a more geopolitical actor.

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