



Geopolitics and the Covid-19 pandemic: a distorted turn in EU external relations

Richard Youngs*

Summary

The declared priority of the new EU leadership is to ensure the Union acts as a more 'geopolitical' power. While this geopolitical turn has been widely welcomed, it is based on many questionable assumptions. This policy analysis identifies three key features of recent EU external action: a more protective approach to security; more geo-economic priorities; and a more eclectic stance on global order. It suggests that the EU's responses to the Covid-19 pandemic are set to accentuate these three trends.

The EU has confusingly ended up bemoaning the geopolitical tenor of global politics while insisting on its own turn to geopolitics. The EU's deficiency is not so much an aversion to geopolitics as an increasingly narrow conception of self-interest. Its geopolitical narrative is a questionable basis upon which to design policy for the Covid-19 era.

* Richard Youngs is a senior fellow in the Democracy, Conflict, and Governance Program, based at Carnegie Europe. He works on EU foreign policy and on issues of international democracy. Youngs is also a professor of International Relations at the University of Warwick.

1 Introduction

In the last year a narrative has gained prominence: the European Union (EU) needs to be more ‘geopolitical’. The new EU leadership has promised a ‘geopolitical Commission’.¹ French President Emmanuel Macron has called for the Union to be a ‘geopolitical power’.² High Representative Josep Borrell has enjoined the EU to ‘re-learn the language of power’.³ Politicians, diplomats and analysts seem almost universally to welcome this incipient geopolitical turn.

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This policy analysis takes a contrarian line by questioning some of the core assumptions on which the EU’s new geopolitical narrative is based. It challenges the received wisdom that EU external action has erred mainly in being insufficiently driven by realpolitik self-interest. The report identifies three powerful recent trends or axes in EU external action that relate to geopolitical strategy in complex and varied ways: ‘protective security’, geo-economics and a more instrumental approach to liberal order. These axes add nuance to what lies behind the EU’s geopolitical narrative, and in important ways cast doubt on its sufficiency and appropriateness. Crucially, the report argues that the Covid-19 pandemic is set to intensify these existing trends in EU external policies. The coronavirus emergency makes the EU’s geopolitical narrative an even more problematic way of framing external aims.

2 Distorted narrative

Geopolitics has long been a fiercely contested concept; it is not in itself a term that prescribes any particular course of foreign policy action. It is ostensibly about having an overarching strategy for managing the geography of power.⁴ To this end,

acting geopolitically can mean almost anything, from assertive foreign interventions through to strategically astute inaction. While a geopolitical narrative has gained prominence, the EU has so far offered little detail about how it defines a geopolitical policy. In practice, European leaders and senior officials customarily deploy the term geopolitics loosely to denote a kind of more committed, generic realpolitik.

In this respect the EU’s base justification – the starting point – for its geopolitical turn is built upon some questionable assumptions. The fairly common diagnosis is that EU foreign policy has erred for many years in being too weak in the pursuit of European self-interest. The widely accepted starting point is that the EU has been a liberal power whose benign concern with norms and global public goods is increasingly and sadly thwarted by a world of raw power politics. The line is that the EU has been too liberally noble for its own good, too enlightened and other-regarding to wield power in the name of Europe’s own interests. The common call is for the EU to be more deeply engaged in global challenges in ways that assertively prioritise interest and power calculations.

Post-liberalism in denial. For those long on the receiving end of European power and foreign policies these claims might seem curious. In truth, the EU and its member states have always been strongly driven by their interests and in recent years have engaged in a great deal of hard-nosed realpolitik. For quite some number of years the EU has already exhibited in a fairly pronounced form at least some features of a post-liberal power; in adapting to a more challenging global context it has overridden many of its ostensibly liberal principles. The European narrative supposes that threats to liberal order are due entirely to *others’* actions; yet member state governments have themselves often acted in ways that compound the fragilities and imbalances of the current global order. Far from having to ‘re-learn power’ the EU has for at least a decade been doubling-down on a much more narrowly instrumental understanding of what its own power-protection requires.

¹ ‘Meet von der Leyen’s geopolitical Commission’, *Politico*, 14 April 2019

² ‘Emmanuel Macron warns Europe: NATO is becoming brain-dead’, *The Economist*, 7 November 2019

³ J. Borrell, ‘Embracing Europe’s Power’, *Project Syndicate*, 8 February 2020

⁴ G. O’Tuathail, S. Dalby and P. Routledge (eds) *The Geopolitics Reader*, London, Routledge, 2003

The EU's liberal narrative has always been somewhat at odds with the more eclectic reality of its external policies. It is a story the Union tells itself and about itself to others, in at least some measure as a tool for building a legitimising identity – both internally and externally. If the EU was never quite the kind of power it claimed or perhaps aspired to be, this gap between narrative and reality has certainly grown wider and more palpable in recent years.⁵ The mantra that the EU's main problem lies in it being too liberally-cosmopolitan and power-shy to safeguard its own immediate interests is hard to square with the evidence of the last decade.

Consider just a selection of policy developments in the last few years. The EU has sought multiple strategic and economic partnerships and alliances outside the rubric of multilateral norms and institutions. The EU and its member states have massively increased funding for cooperative authoritarian governments. They have supported multiple gas pipelines with autocratic regimes. They have increased arms sales and military cooperation with some of the world's most repressive governments. They have diluted trade preferences for developing states. They have channelled significant shares of development funds into security and border-control projects oriented towards the EU's own immediate interests. They have negotiated with decidedly illiberal governments to blunt the impact of popular pro-democracy protests.

As part of the geopolitical narrative, it is often argued that the EU needs to rely less on simply offering the Union's own integration norms as a foreign policy tool; in truth it has long ceased to do so. The so-called Europeanisation dynamic is still relevant in some countries. However, the EU has added more traditional diplomatic and geopolitically tailored ways of acting in places like Ukraine, Turkey and the Arab states of the now moribund integrative project of the Euro-Mediterranean Partnership. The EU has already made what one writer terms a shift from rules-

led to events-led foreign policy – prioritising its immediate interests in the tumult of sudden or emerging challenges.⁶

None of this is to deny that EU international policies still have significant liberal elements. Overall, it can be said that European foreign policies are more varied than ten or twenty years ago: the EU can act in decidedly illiberal ways in some contexts, while operating as a fairly distinctive liberal power in others. The EU still does much that is admirable in upholding international rules, supporting development and human rights projects, and seeking to put a brake on hard-power unilateralism. Yet this does not alter the germane point that the need for a 'geopolitical turn' is based on an exaggerated and simplistic description of prevailing European and global dynamics.

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While many would argue that the EU's hard-nosed realpolitik of the last decade was necessary and overdue, this issue here is the slightly different one of whether the starting point for current policy deliberations is accurate. If it is acknowledged that the EU has already shifted a fair distance along the spectrum from the liberal toward the realpolitik end of the foreign-policy spectrum then the calculations change about what further types of strategic adjustment are needed. A contrarian question that then emerges is whether the EU has perhaps already gone far enough or even *too far* in adopting geopolitical power – the very inverse of leaders' current framing of the Union's strategic imperative. Indeed, arguably the EU's main deficiency in recent years has not been an anti-geopolitics disposition or an aversion to power and self-interest, but an increasingly circumscribed notion of what power and self-interest entail.

⁵ O. Waever, 'A post-Western Europe: strange identities in a less liberal world order', *Ethics and International Affairs*, 32/1, 2018; A. Wivel and O. Waever, 'The Power of Peaceful Change: The Crisis of the European Union and the Rebalancing of Europe's Regional Order' *International Studies Review*, 20, 2018

⁶ L. van Middelaar, *Alarums and Excursions: Improvising Politics on the European Stage*, Agenda Publishing, 2019

Caricatured divide. If the standard EU narrative is overly self-satisfied in terms of the Union's own liberal credentials it also caricatures the rest of the world. The EU ritually portrays itself as a last bastion of liberal values that is pitted against an illiberal world beyond its borders. This binary contrast between liberal Europe and the illiberal outside risks being overly stark and simplistic. There are certainly illiberal governments beyond Europe doing much to undermine cooperative international norms; but there are also many governmental and social actors supportive of liberal norms in other parts of the world. Cooperative regional projects have been in a more positive phase of development in other regions than in Europe in the last decade, while some countries and societies' efforts on human rights and the treatment of migrants are hardly inferior to European policies. Indeed, there are many actors around the world – including civic organisations and some middle powers – trying to advance at least some liberal values with the EU acting against them rather than in support.

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Reality is messier than the binary the EU sets up to justify the need for harder-edged power politics: liberal and illiberal forces exist and are in battle with each other in all regions, including Europe itself. This is the necessary starting point for an appropriate form of modern geopolitics, rather than the current tendency to posit the outside world only as a threat to liberal values. It is curious that most in the wider analytical community have uncritically bought into this particular part of the official narrative.

Power versus legitimacy. Another element of distortion that follows from this is related to the tension between power and legitimacy. In the rising narrative of geopolitics, it is assumed that the EU's main shortcoming is a dearth of power. It follows that rectifying this signal deficiency is about quantitative upgrades. The EU's priority is to be a big power, with tighter singularity in its actions and with higher levels of capacity – whether military or technological. The onus is on size and material capacity, and on the wherewithal to use assets to the maximum.

Yet in parallel with the power narrative is another that sees the EU's most debilitating shortcoming to lie in its drained legitimacy. Rectifying this is about qualitative more than quantitative change. While strategic planners focus on the need for resolute EU power, defence capabilities, new measures for geopolitical rivalry and the reassertion of European sovereignty, citizens inside the member states apparently seek a European project that is more differentiated, responsive, transparent and locally-rooted.⁷

Perhaps the now-defining EU puzzle is how the power and legitimacy imperatives relate to each other. It might be argued that if the EU does not engage more openly with European populations, the issue of external power becomes in essence moot – there will be little EU project left to protect or project internationally. Most would say that power and legitimacy can and should be enhanced together. The same policy programme that announced the EU leadership team's intent to be 'geopolitical' also promised a Union closer to its citizens. However, thorny questions persist about how far these two aims are fully compatible with each other.

Boosting geopolitical power may require types of reform that sit uneasily with the aim of enhancing legitimacy – with the inverse also being true. The two aims might not be intrinsically incompatible but there are surely tensions between them. While many analysts insist that external imperatives place

⁷ Pew Research Centre, 'In Western Europe, populist parties tap anti-establishment frustration but have little appeal across ideological divides', July 2018, p. 50; F. Schimmelfennig, 'Is differentiation the future of European integration?', in B. Fagersten and G. von Sydow (eds) *Perspectives on the Future of the EU*, Stockholm, Swedish Institute for European Policy Studies, 2019

a premium on centralisation and state-like power, this is the very opposite of the kind of EU reforms that European citizens say they want.⁸ Critics point out that the EU has increasingly deployed a notion of 'European sovereignty' to mean old-style international power that sits uneasily with internal popular accountability.⁹ What the EU gains in traditional forms of power – or geopolitical influence – it could easily throw away in its loss of legitimacy-based identity. The EU is still to grasp the nettle of this fraught relationship between power and legitimacy, between a geopolitical Europe and a citizen's Europe.

3 Three axes of EU external action

In light of these conceptual qualms over the EU's use of the geopolitical narrative, it is instructive to examine the more concrete and precise ways in which EU external action has evolved in practice. In recent years three clear trends have emerged in EU external action that add detail and nuance to debates about geopolitics. Each of these three axes helps shed more precise light on what is behind the EU's geopolitical narrative. As they relate to this narrative in complex ways, they offer a more instructive analytical prism on EU external action than the very broad talk of geopolitics.

3.1 Protection or projection?

A first axis is that in recent years a different balance has taken root in the relationship between *protecting* core EU interests and *projecting* European power. When many policy-makers, journalists and analysts refer to the geopolitical narrative they tend to equate it with a stronger projection of EU policies, resources and engagements externally. Yet in recent years the priority aim has been interest-preservation through protection not projection. The EU and its member states have invested more effort and

resources in policy areas that are essentially about protection.

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The notion of *protective security* is a common thread linking together otherwise disparate strands of policy development. A detailed account of these different policy areas is beyond this article's remit; but the main features of the protective turn are well known. The protective logic is seen in new areas of defence coordination between EU member states through PESCO (Permanent Structured Cooperation) and the new European Defence Fund, along with the increasing priority attached to border control, counter-terrorism and cyber-security. These are the policy areas that have attracted the largest injection of funds and strongest political commitment in recent years.¹⁰

While the EU has always framed its international identity as that of a 'security provider' to other regions it shows signs of having narrowed its identity to that of a 'security defender'. The policy shifts rest crucially on a less diffuse way of defining self-interest. The EU has become a far less transformative power and more of a 'bordering power'.¹¹ Policy-makers generally interpret the new buzz-concepts of European 'autonomy' and 'sovereignty' as implying protective boundaries against the external.¹² If the core of the EU's erstwhile global vision was about dissolving borders, increasingly it has been about demarcating itself more clearly from others.¹³ The turn to protective security reflects a fairly deep-rooted

⁸ For a discussion of inward and outward facing legitimacy, see O. Costa, 'The politicization of EU external relations', *Journal of European Public Policy*, 26/5, 2019

⁹ H. Kundnani, 'Europe's sovereignty conundrum', *Berlin Policy Journal*, May 2020

¹⁰ R. Parkes, 'Reading the runes: the future of CSDP and AFSJ' in D. Fiott, *The CSDP in 2020*, Paris: EU Institute for Security Studies, 2020, p. 101

¹¹ S. Lucarelli, 'The EU as a securitising agent? Testing the model, advancing the literature,' *West European Politics*, 42/2, 2019, p. 424

¹² L. Simon, 'What is Europe's role in Sino-American competition?', *War on the Rocks*, 14 February 2019

¹³ C. Kinnvall, 'The postcolonial has moved into Europe: bordering, security and ethno-cultural belonging', *Journal of Common Market Studies* 54/1, 2016

change in the way that strategic interests are defined at their most basic level.

Many use the geopolitical narrative as a loose coda for ‘The EU must get more engaged in international issues’ – it is often accompanied with injunctions for the EU to ‘do more’ in conflicts like those in Syria and Libya. Yet, if this is indeed what the EU has in mind, it will entail an abrupt reversal in the way interests have been defined in recent years. At the moment there is little firm sign that this is likely. Each strategy – protection and projection – has merits and demerits. But they entail quite different logics, and this is not something acknowledged or addressed in the new EU leadership’s geopolitical narrative.

3.2 Geo-economics versus geopolitics

Although European leaders now talk routinely of their geopolitical ambition, in practice much EU effort is focused far more on geo-economics. While the concepts overlap and are often used as if they were interchangeable, there are tensions between geopolitics and geo-economics. Geo-economics prioritises relative economic power; it entails foreign-policy instruments being deployed in the service of economic interests. Geopolitics is more concerned with the wider dimensions of strategic rivalry and can entail economic instruments being used in the service of wider foreign policy goals.¹⁴

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In recent years geo-economics have gained clear pre-eminence over geopolitics. In some senses EU trade policy has been mobilised for other, non-economic goals such as climate and development aims. But the stronger dynamic has been the inverse one of the EU using more political leverage for economic and commercial interests.

Notable momentum has gathered behind the EU’s commitment to a more strategic trade policy. Over the last decade, the EU has signed an increasing number of bilateral trade deals and moved towards tougher rules on ‘reciprocity’, making other countries’ access to European markets more conditional on EU access to others’ markets. The long-debated EU investment screening mechanism will become operational in 2020. Talk of diluting competition rules to help foster ‘European champions’ has become ubiquitous. In parallel to these major EU-level changes, member states have dramatically beefed up their bilateral commercial diplomacy strategies. The EU has also recently proposed a strategy for strengthening the international role of the euro. While there have been limits to all these policy changes, debates have intensified between member states over the drift towards geo-economic mercantilism.¹⁵

From thinking in terms of international interdependence in win-win terms, the EU has inched towards more concern with the bloc’s relative economic position vis-à-vis other powers – this change is far from absolute, but nonetheless meaningful.¹⁶ The EU’s core, basic stance in the global political economy has shifted towards ‘competitive interdependence’: a focus on its own market shares and competitiveness rather than an economic order of generic, milieu benefit.¹⁷ This shift is especially marked in EU strategy for the European digital sector.

This trend has somewhat inverted the relationship between economic and political elements of EU external action. As the EU has gradually homed in on traditional commercial interests it has shifted away from its aim to use trade power as a platform for spreading the Union’s normative principles and cooperative security. It has come to prioritise political strategies to shore up its relative economic power, reversing the policy of using trade as a tool for normative-liberal change within other

¹⁴ E. Luttwark, ‘From Geopolitics to Geo-economics: logic of conflict, grammar of commerce’, *The National Interest*, No. 20, 1990

¹⁵ ‘Europe’s last free traders plan their counterattack’, Politico, 3 February 2020

¹⁶ B. Clift and C. Woll, ‘Economic Patriotism: Reinventing Control Over Open Markets’, *Journal of European Public Policy*, 19/2, 2012

¹⁷ A. Sbragia, ‘The EU, the US and Trade Policy: competitive interdependence in the management of globalization’, *Journal of European Public Policy* 17/3, 2010

countries.¹⁸ The EU and its member states have increasingly deployed political and diplomatic resources to further immediate commercial interests; it is less clear that they attach comparable importance to using economic statecraft to boost the broader parameters of EU global power. The EU has begun increasingly to wield political power for short-term commercial gain rather than foregoing this in the name of shaping longer-term and more diffuse influence over the contours of global politics.¹⁹

3.3 Order or transactional interests?

A third axis is the EU's recalibrated approach towards the overarching structures of global order. Recent years have witnessed a curious duality. On the one hand is an apparently stronger EU commitment to defending the basic tenets of liberal international order.²⁰ On the other hand, many elements of EU policies in practice have shifted towards a more measured support for that order. No longer able to rely so firmly on the principles of liberal order, European powers have increasingly favoured a form of soft hedging in defence of their vital interests. The EU has sought to preserve the benefits of multilateralism where feasible, while adjusting to the dynamics of competitive power politics. Overall European foreign policy has come to involve a complex mix of multilateral principle, highly expedient bilateral relations and more novel plurilateral solutions.²¹

This mixed approach can be seen in the key relations with both the US and China. In these cases, EU policy has become more *modular* in response to the well documented evolution of both US and Chinese geo-strategies. The Union now

looks for partnership with these two powers where it can find support on discrete policy issues on a case-by-case basis, but increasingly stands back from unconditional across-the-board engagement with either of them. One result of this modular approach is that the EU has prioritised strategic engagement with middle-sized powers like Japan and India.²²

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Reflecting its more instrumental approach to liberal order, the EU has increasingly used cooperative forums for interests that are more transactional than order-related.²³ Other states increasingly see the EU as a *barrier* to a fairer and more genuinely balanced world order.²⁴ European governments are clear-headed in seeing the US's uneasy use of coercive power-politics in the name of liberal order but fail to register that their own actions involve at least a softer version of the same logic.²⁵ The EU's framing tends to imply that the Union can restore the fading liberal order through upping its own existing policy approaches; yet many of its own interest-driven policies are themselves widening the far deeper structural faults at the heart of that order's malaise.

The new geopolitical narrative may risk pushing the EU even further away from a more equal and

¹⁸ S. Meunier and K. Nicolaidis, 'The Geopoliticization of European Trade and Investment Policy', *Journal of Common Market Studies*, 57, Annual review, 2019

¹⁹ M. Sandbu, 'Europe must find its will to power', *Financial Times*, 20 June 2019

²⁰ European Union, *New Strategic Agenda 2019–2024*, 2019, p.6. H. Maas, 'Making plans for a new world order', *Handelsblatt*, 22 August 2018. For a good account of German approaches, see T. Benner, 'What's left of multilateralism?' *Internationale Politik*, Nov–Dec 2019

²¹ T. Renard, 'Partnerships for effective multilateralism? Assessing the compatibility between EU bilateralism, inter-regionalism and multilateralism', *Cambridge Review of International Affairs*, 29/1, 2016

²² L. Andersen, 'Curb your enthusiasm: middle power liberal internationalism and the future of the United Nations', *International Journal*, 74/1, 2019

²³ B. Szcwzyk, 'Europe and the Liberal order', *Survival* 61/2, 2019, p. 50

²⁴ G. Grevi, *Strategic autonomy for European choices: the key to Europe's shaping power*, European Policy Centre, 2019

²⁵ See P. Porter, *The False Promise of Liberal Order*, Polity Press, 2020 for this framework on the US approach to liberal order

forward-looking rebalancing of the rules-based order. In many regions ‘geopolitics’ is associated with a surfeit not dearth of European power; in its origins the concept was associated with the very worst of European expansionism and imperialism. In light of this, the narrative of ‘relearning the language of power’ gives a backward tone to current EU pronouncements. It means that the emerging talk of geopolitics is redolent with very old notions of power. Surely, the challenge is not so much to re-learn former notions of order and power but to adapt to the qualitatively new ones that are rapidly taking shape.

4 Covid-19 sows geopolitical doubts

Just as the EU was ramping-up its geopolitical narrative, the Covid-19 pandemic hit and has naturally altered the policy context within and beyond Europe. Self-evidently, the Covid-19 pandemic has focused attention mainly on domestic policies within Europe; but it will also have significant external dimensions. Its impact will take some time to become clear and will fluctuate in uncertain ways for a lengthy period. Some faint lines of external response are becoming apparent, however. Crucially, the pandemic is likely to accentuate the three axes of EU external action dissected above.

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Some elements of the EU response to the virus have focused strongly on the need for stronger international cooperation and global governance. For the moment the pandemic seems to have somewhat reduced the prominence of the EU’s geopolitical narrative, as governments seek international assistance and cooperation – even as they pursue their very nationally centred emergency responses. A solidarity narrative seems to have displaced the geopolitical narrative.

European leaders and senior officials have called for global coordination and international support to help temper the virus’ impact across the world. The EU put together a package of 15.6 billion euros of emergency support for developing states. It offered 3 billion euros of loans for macro-economic assistance to ten countries in the neighbourhood judged to be especially vulnerable to balance of payments difficulties – Ukraine, Georgia and Moldova in the east, Tunisia and Jordan in the south, and five Balkan states.²⁶ And most notably with regard to its lead role in multilateral coordination, the EU hosted a pledging conference in early May 2020 that delivered a headline figure of 7.5 billion euros mainly for cooperation on a vaccine – with notable pledges from France (1.5 billion euros), the Commission (1 billion), Germany (500 million), the UK (450 million) and the Netherlands (200 million) amongst others.²⁷

Despite the calls for international cooperation and enhanced global governance, however, most tangible elements of preliminary EU responses to Covid-19 reflect a different set of dynamics. Perhaps unsurprisingly, European governments have been focused overwhelmingly on domestic rather than international concerns and as yet they show limited signs of following through on their own injunctions for more international action and coordination. Significantly, the three trendlines or axes in EU external action dissected in the previous sections are coming even more to the foreground.

Protective security-plus. The EU’s turn to protective security is likely to become even more marked as a result of the pandemic. The outward projection of EU capabilities and resources stands attenuated rather than upgraded. The emergency aid committed so far is almost entirely from funds that the European Commission and governments have already committed; this was true of the Commission’s 15 billion-euro package and a similar French move to reassign 1.2 billion euros of bilateral aid. The Commission’s 1 billion-euro pledge at the May donors conference also involved a ‘re-prioritisation’ of exiting funds; similar doubts

²⁶ European Commission, ‘Proposal for a decision of the European Parliament and of the Council on providing Macro-Financial Assistance to enlargement and neighbourhood partners in the context of the COVID-19 pandemic crisis’, 22 April 2020, https://ec.europa.eu/info/sites/info/files/proposal_on_providing_macrofinancial_assistance_enlargement_and_neighbourhood_partners.pdf

²⁷ European Union, Coronavirus global response, Pledge, 2020, https://global-response.europa.eu/pledge_en

surfaced about member states' pledges too. Belying their rhetoric, the reality is that member states are not stepping up to offer significant amounts of increased support, either direct to developing states or to multilateral organisations.

An even more severe crunch is likely to come over the medium term as the debt overhang from the pandemic puts pressure on the renewal of member state aid budgets. Moreover, external aid promises made so far are a tiny fraction of the various emergency funds being disbursed within the Union itself. The hardest hit European states are fighting for the new EU budget to prioritise support for them, to the detriment of resources available for external action.

Funds will almost certainly be cut to the European Defence Fund and Peace Facility within these ongoing budget – or Multi-annual Financial Framework – negotiations. The EU Military Staff has been used to help with management of the crisis within member states; European states have downscaled their involvement in NATO exercises focused on defending the eastern flank in order to use the alliance's assets to deliver medical supplies within Europe itself.²⁸ Member states are recalling many troops from Common Security and Defence Policy missions in part to focus on the internal crisis and in part due to the virus spreading in conflict zones. Of course, these may be temporary diversions, and many other powers will face a squeeze on military budgets too – so the EU's relative, underlying power capabilities may not suffer dramatically. Nevertheless, the emerging debates indicate that funding priorities are set to be more internally than externally focused, despite all the rhetoric calling for deeper global coordination. More speculatively, there are incipient signs of virus-related travel restrictions being used as a gateway for even harsher EU measures against migration and refugee inflows.

Turbo-charged geo-economics. Covid-19 is also likely to push the EU further towards a hard-edged geo-economics. In what has become the standard

and most prominent line on external action, many governments, ministers and EU leaders have begun to advocate onshoring and more managed trade, accentuating the existing direction of EU external economic policies. The virus has deepened concerns about the EU's dependency on Chinese goods and funds. While European governments have criticised the US for medical protectionism, Global Trade Alert notes that EU states have imposed some of the most stringent export controls on medical supplies.²⁹ President Macron has called for manufacturing and medical production to be brought back from China and elsewhere to Europe, while Italy has introduced an upgraded commercial diplomacy strategy to help its firms overcome the Covid-19 crisis.³⁰ The EU trade commissioner has pushed to accelerate and beef up the investment screening mechanism to prevent China and others snapping up crisis-hit assets.

The geo-economic shift will not be unlimited. While EU states plot a course for more geo-economic autonomy, they will also come out of the crisis needing funds and investment. Reports claimed that the EU diluted criticism of Chinese Covid-19 misinformation in a report because Beijing threatened economic consequences (EU officials deny the charge).³¹ The focus on autonomy of supply may fall mainly in the medical sector, less so across the board in external trade. In the G7, European leaders have committed to making open trade the leading edge of globally coordinated recovery. The Commission has pushed to re-open frozen trade talks with the US. The EU trade commissioner has warned that the EU could not realistically be self-sufficient even in the medical sector alone.³²

The overall result is that the EU is likely to attempt an even finer balance in its external action, seeking benefits from more coordinated economic globalism while also building firewalls against this. EU trade policies are set to become even more strategic, and instrumental rather than rules-based. The common Covid-19 EU line is that the Union

²⁸ 'NATO tasks top commander to speed up medical aid', *Euractiv*, 3 April 2020

²⁹ Global Trade Alert, *21st century tracking of pandemic-era trade policies in food and medical products*, 2020

³⁰ 'The cure for the coronavirus crisis: more trade or less?', *Politico*, 1 April 2020

³¹ 'Pressured by China, EU softens report on Covid-19 disinformation', *New York Times*, 24 April 2020

³² 'EU should 'not aim for self-sufficiency' after coronavirus, trade chief says', *Financial Times*, 23 April 2020

needs more self-reliant supply resilience without overt protectionism. The EU is unlikely to seek an unrealistic self-sufficiency but is already seeking to diversify its supply chains. The analytical prism that captures the emerging EU response is the geo-economics paradigm that has been gathering momentum for several years already.

The UK's geo-economic path is also evolving due to Brexit and Covid-19. The British government has set itself against the EU's drift towards strategic trade policy and explicitly against what it sees as incipiently 'autarkic' responses to Covid-19.³³ Yet, the UK has itself already embarked upon a highly geo-economic and transactional quest for commercial deals and its straitened economic plight is likely to prompt it further in the same direction. These considerations are feeding into both the EU-UK trade talks and the EU's own global economic strategy. The pandemic will make geo-economics an even more important dimension of EU-UK relations.

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A narrower vision of global order. As a result of the pandemic the EU is likely to continue its current tilt towards a thinner and more selective conception of global order. EU diplomacy and aid have begun to focus more on concrete health and basic humanitarian issues and tighter global governance rules on biological threats. The Franco-German Alliance for Multilateralism has mobilised specifically for emergency health-policy coordination.³⁴ It remains to be seen whether the

EU makes any tangible moves on the more diffuse elements of order-maintenance; for now, the focus is on short-term cooperation aimed specifically at health-related cooperation.

President Macron argues that the pandemic forces a 'rethink of multilateralism' that combines 'more health multilateralism, more political multilateralism' with more national sovereignty and strategic autonomy.³⁵ One of the High Representative's main statements to date offers generic claims about the need for multilateral coordination but offers little indication of EU approaches to global order broadening out in practice (indeed it focuses overwhelmingly on internal EU challenges).³⁶ The EU's much-repeated 'there are no national solutions' line may be accurate, but it risks becoming a rather imprecise and hollow cliché, if not backed up by a different, broader and more balanced approach to liberal order.

The 'thinner' approach to global order is seen in the EU downgrading rights issues relative to stability concerns. Covid-19 emergency support is being taken from existing aid³⁷ and will almost unavoidably be drawn away from longer-term reform priorities related to issues like democracy and human rights. And with medical aid flowing the other way from autocracies like China, Turkey and Russia into EU states, the scales have tipped further against any democracy and human rights focus in EU diplomacy. Voices in the EU are now being raised in favour of lifting sanctions on Russia. One of Borrell's more eye-catching suggestions has been to suggest that the EU should help ensure authoritarian regimes in Syria, North Korea, Venezuela and Iran do not 'collapse' due to the pandemic.³⁸ European support for 'global order'

³³ B. Johnson, 'PM speech in Greenwich', 3 February 2020, <https://www.gov.uk/government/speeches/pm-speech-in-greenwich-3-february-2020>

³⁴ Federal Foreign Office, 'Covid-19: a wake-up call for multilateralism', 16 April 2020, <https://www.auswaertiges-amt.de/en/aussenpolitik/multi-alliance-corona/2333374>

³⁵ 'FT interview: Emmanuel Macron says it is time to think the unthinkable', *Financial Times*, May 2020

³⁶ J. Borrell, 'The post-virus world is already here', European Council on Foreign Relations Policy Brief, 2020

³⁷ European Union, Coronavirus global response, Pledge, 2020, https://global-response.europa.eu/pledge_en

³⁸ European Union External Action, 'The Coronavirus pandemic and the new world it is creating', 23 March 2020, https://eeas.europa.eu/headquarters/headquarters-homepage/76379/coronavirus-pandemic-and-new-world-it-creating_en; Council of the European Union, 'Declaration of the High Representative Josep Borrell on behalf of the EU on the UN Secretary General's appeal for an immediate global ceasefire', 3 April 2020, <https://www.consilium.europa.eu/en/press/press-releases/2020/04/03/declaration-by-the-high-representative-josep-borrell-on-behalf-of-the-eu-on-the-un-secretary-general-s-appeal-for-an-immediate-global-ceasefire/>

seems set to pivot towards the stability of that order rather than its liberal components.

As member states make familiar calls for stronger rules-based order to help with the virus, the pandemic has made the EU even more prone to remonstrating that this order is at risk from others, but not its own actions. If this was unconvincing before Covid-19 it is even more unfortunate now, given the national preferentialism prominent within European responses. The countries in Africa, Latin America and other regions that for now have contained the pandemic relatively well might look aghast at how badly many European countries have handled the crisis and feel that they are the ones to impart injunctions on effective order to the EU rather than vice versa.

"The politics of Covid-19 reinforce a feeling that the EU's main order-related challenge is to preserve its own interests from an increasingly bitter US-China rivalry."

The politics of Covid-19 reinforce a feeling that the EU's main order-related challenge is to preserve its own interests from an increasingly bitter US-China rivalry. Tensions with the US have grown as the Trump administration has overtly undercut efforts at international cooperation on Covid-19. At the same time, China's Covid diplomacy has been heavy-handed enough to spark a modest European pushback against Beijing too – in relation to China's asset swoops and attempts to censor several EU statements on the virus, for example.³⁹ The EU's Janus-faced hedging between the US and China is becoming an even more defining element of EU external strategies. As much focus is on how the balance of power will shift between the US and China, the pandemic looks set to leave the EU slightly cooler towards and more distant from both these powers. It is likely to accentuate the modular nature of EU relations with the two powers that has already emerged in recent years. Managing the

geopolitics of 'in-betweenness' will become an even more constraining priority in Covid-19's wake.

5 Conclusion

All incoming leadership teams promise to raise the EU's role in world politics; Commission president Ursula von der Leyen's stated 'geopolitical' ambition is only a first step that will need to be backed up by greater clarity and precision on how the EU understands geopolitics. Generic injunctions for the EU to be united, more assertive or more willing to use hard power do not take us far in understanding what would be the most effective form of geopolitics. Before Covid-19 struck the EU's geopolitical turn was threatening to push the Union's external actions in some highly questionably and potentially damaging directions. It was based on a dubious diagnosis that EU foreign policy has failed in recent years because it has neglected strategic self-interest. If anything, the EU has rather erred in narrowing down its understanding of self-interest so far that it has damaged the very liberal principles within which its wider global vision is ostensibly nested.

The Covid-19 pandemic has added further confusion and uncertainty to this worrying picture. Dissecting the trends in EU external action over the 2010s enables us to see how incipient EU responses to the Covid-19 pandemic are rooted in and grow out of already-existing strategic approaches – rather than representing a qualitative fresh start.⁴⁰ EU leaders started to foreground a geopolitics narrative in 2019 and early 2020; hit by the virus they have appealed for positive-sum global cooperation, while in practice giving clear priority to national priorities. While the whole geopolitical narrative sits uneasily with the narrative centred on Covid-related global solidarity, the EU is also set to tighten three particularly interest-driven axes of its external action: protective security, geo-economics and transactional-oriented order.

The juxtaposition of these different layers of strategy has for now muddled the waters of what the EU aspires to in terms of its core international identity. The Covid-19 emergency appears to be

³⁹ A. Small, 'The meaning of systemic rivalry: Europe and China beyond the pandemic', European Council on Foreign Relations Policy Brief, 2020

⁴⁰ This is in line with what R. Haas, 'The pandemic will accelerate history rather than reshape it', *Foreign Affairs*, 7 April 2020 argues for US foreign policy

pulling the EU in different directions, adding to the uncertainty over the EU's international identity. In light of the pandemic the EU has ended up in a strange situation of advocating geopolitical and anti-geopolitical positions simultaneously – or more exactly, berating others' geopolitical approaches as intrinsically harmful but its own geopolitical turn as appropriate and benign.

All this means that there are reasons seriously to doubt that geopolitics is a particularly helpful

framing for the future of EU external action. If it is to be the pivot around which EU foreign policies are based, then the Union certainly needs some deep reflection on how to define a fully modern and innovative form of geopolitics. Being geopolitical in the right way is a more complex issue conceptually than repeatedly stating a need for the EU to be united and engaged in international affairs. If these challenges were pressing ones before the Covid-19 pandemic, they are even more arduous ones today.