

EU FOREIGN POLICY IN THE NEXT POLITICAL CYCLE Beyond geopolitical Europe

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# EU FOREIGN POLICY IN THE NEXT POLITICAL CYCLE

Beyond geopolitical Europe

The 'geopolitical' Commission of the past five years is to be replaced by a 'geoeconomic' discourse in the next political cycle. To enact the hard strategic choices ahead for the next Commission the EU needs to refocus on the normative underpinnings, the instruments of tried-and-tested effectiveness, and on managing expectations. A 'geophilosophy' of Europe can be harnessed as a constitutive lens to understand and practice foreign policy.

## KEY FINDINGS

- Defence policy crunch: in view of a transactional Trump presidency, it will be key for the EU to advance on realistic objectives such as defence procurement.
- The global majority crunch: the EU needs to craft a logic and modus operandi of co-development around its strategic priorities.
- EU enlargement crunch: the momentum to deliver on its broader normative and reform objectives needs to be sustained.

### **A postmortem on the 'geopolitical Commission' (2019–2024)**

Five years ago, at the beginning of her mandate, Ursula von der Leyen declared the urgency of building a 'geopolitical' Commission, that is one that, in the words of High Representative Borrell, learned to 'speak the language of power'.

On a political level, the affirmation of the newly proclaimed geopolitical role required a narrowing of Member States' differences and a movement towards a common strategic culture. It demanded that the EU should acquire the necessary instruments and pool its resources, including defence capabilities, to an extent that EU member states have so far rejected. Moreover,

“Terms like geopolitics and geoeconomics represent discursive markers that set the tone of how the EU intends to position itself. But they risk to overpromise and underperform in the face of actual deliverables.”

This geopolitical proposition was inaugurated before the Covid pandemic and prior to Russia's February 2022 invasion of Ukraine and it was the war in Ukraine that really put it to the test. As quickly as March 2022, the Commission president stated her support for the possibility of EU membership for Ukraine, which was later substantiated by record-speed approval of Kyiv's candidate status. Countering Russia's military advance with such a prospect represented explicit application of a geopolitical logic to the EU's enlargement. Substantial military support to Ukraine, including heavy equipment, and the stringent sanction regime imposed on Russia corroborated this impression and underscored the need for the European Union to beef up its instruments of coercion.

However, this is not necessarily a comfortable terrain for the EU. EU leaders have typically accompanied these momentous moves with declarations of commitment to cooperation and multilateralism that evoke a more value-driven agenda. This juxtaposition exposes a cognitive dissonance of sorts in the narrative of 'geopolitical Europe'. The geopolitical framing, with its adversarial and binary underpinnings, seems ill-suited to further Europe's agenda. Several scholars<sup>1</sup> have underlined the discrepancy between means and ends, as well as the inconsistency between this new framing and the EU's self-perception as a power equipped with civilian and regulatory means to shape a rules-based order.

the new, acute, phase of Israel's conflict with its neighbours has exposed divisions among EU member states and within EU institutions, while the influence of Europeans on the evolution of this conflict is limited.

The most significant crunch point, where the EU's geopolitical turn has and will continue to be tested, concerns the development of the EU defence policy. The creation of a Commissioner for Defence in the new College underscores the urgency of developing a genuine defence industrial policy in the EU. While the intricacies of EU cross-institutional coordination remain noteworthy, they should not distract from the strategic task ahead of the EU, which will be heavily influenced by developments in the United States. The re-election of Donald Trump ushers in a new era of 'America First' foreign policy that will see a transactional and isolationist pivot away from Europe. The biggest challenge for Europe in the defence sphere will be to learn to operate on its own while managing expectations.

### **The making of a geoeconomic Commission (2024–2029)?**

For the political cycle now upon us, the geopolitical narrative has shifted markedly towards 'geoeconomics'. The report on competitiveness requested from former Italian prime minister Mario Draghi<sup>2</sup> by Ursula von der Leyen and published last September details the path and timescale of required European progress on issues such as innovation, decarbonisation and security, without which, Draghi warns, the EU is heading into an inexorable 'slow agony'.

Geoeconomics, which factors in the economy as a source and instrument of power, is a concept better suited to European liturgies in areas such as foreign trade that have a centralised decision-making process in Brussels. Empowering a single market of 450 million citizens to pursue objectives that are at the foundation of Europe's social model is a cause likely to garner domestic support. The current, controversial, policies of externalising migration are increasingly motivated by an economic/welfare imperative and, indeed, approving 14 packages of sanctions against Russia is also in essence a geoeconomic tool.

Ursula von der Leyen's political guidelines for the next European Commission are imbued with the spirit of 'geoeconomics'.<sup>3</sup> The guidelines reference and reprise Draghi's plea for the creation of what he calls a 'new economic foreign policy', which can 'coordinate preferential trade agreements and direct investments with resource-rich countries; build stockpiles in selected critical areas; and create industrial partnerships to secure the supply chain for key technologies'.

Draghi's prescription comes with a high price tag, quantified as 750–800 billion euros of investment a year, which fiscal hawks in countries like Germany have immediately opposed. Moreover, while the future

that Draghi fears is not necessarily that of a zero-sum world (declining productivity growth is something Europe must address regardless of what others do), it is a view that pits Europe and the EU against other great powers. However, the Europe of 2025 is older from a demographic standpoint, is a more marginal player on the world arena, and is challenged by an aggressively protectionist US administration that opposes climate targets and free trade.

A crunch point here for the EU concerns the broad array of relations with so-called global majority countries, which the EU is likely to prioritise in the next five years. This relates particularly to Europe–Africa relations, which the geopolitical Commission identified as a privileged partnership. Josef Sikela, the former Czech banker who is the new commissioner for international partnerships, sees his mandate as inherently geoeconomic. As he has declared: 'The International Partnership portfolio will allow me to focus on strengthening the EU's economic security, diversifying our suppliers of critical raw materials, and opening new markets for European companies'.

Here, however, the geoeconomic pivot needs to be applied with greater caution. The EU can draw lessons from the record of its civilian and trade instruments, but must also acknowledge that the competitive logic



Ukrainian president Zelensky and European Commission President von der Leyen at a joint press conference in Kyiv in 2024. Countering Russia's military advance in Ukraine with the prospect of expanding the EU – including a record-speed approval of Ukraine's candidate status – represented an explicit application of geopolitical logic to the EU's enlargement. Photo: Sergey Dolzhenko/EPA/Ritzau Scanpix



that has animated initiatives such as the Global Gateway are unlikely to match the massive resources that the likes of China, Russia or even the United States can draw on. In strategically crucial continents like Africa the EU should double down on defining a logic of co-development, mindful of the scars of the colonial past but also directed toward the future of a green and digital transition and of the capacity-building tools required to sustain this.

### **Toward a geophilosophy of Europe**

Terms like geopolitics and geoeconomics represent discursive markers that set the tone for how the EU intends to position itself. While both have merit for charting a direction of travel, they risk overpromising and underperforming when it comes to actual deliverables. When confronted with these kinds of risk, the first order of business for the EU is to reconnect the level of ambition with the instruments and tools that have proven valuable in shaping the foreign policy profile. More importantly, policy should reconnect with what might be called a 'geophilosophy' of Europe, a term borrowed from Gilles Deleuze that encompasses the values and *raison d'être* that should inspire EU foreign policy.

The crunch point here concerns EU enlargement. Revitalising enlargement as a tried-and-tested, transformative foreign policy is one remarkable and slightly unexpected outcome of the past five years (the previous Commission had explicitly excluded further enlargement). It will return to the top of the Commission's agenda in the next cycle. But while the geopolitical framing proved essential to build momentum, a different mindset is now required.

This will entail, first, renewed attention to the technocratic particulars of the reform agenda both in the candidate countries and in the EU in order to accommodate new members. The EU cannot waive accession criteria nor overcome chokepoints in

relation to EU budget or institutional arrangements without losing credibility. Second, it requires a renewed focus on fairness and justice, considering the broad array of candidate countries in the waiting line. This particularly concerns the western Balkans, a region that has been in the queue for nearly two decades and has long been perceived by the EU like a strategic backwater. Third, the EU will need to play carefully with time. Accessions will take years and need strategic patience and forbearance both in Brussels and Europe's capitals and, above all, from the governments of the candidate countries, especially those like Ukraine whose territorial integrity is likely be questioned.

#### Notes:

- 1 See Hans Kundnani 2023: 'Europe's Geopolitical Confusion' <https://ip-quarterly.com/en/europes-geopolitical-confusion>; Richard Youngs 2022 'The Awakening of Geopolitical Europe?' <https://carnegieendowment.org/research/2022/07/the-awakening-of-geopolitical-europe?lang=en&center=europe>
- 2 Mario Draghi: 'The future of European competitiveness – a competitiveness strategy for Europe' European Commission, 9 September 2024 [https://commission.europa.eu/document/download/97e481fd-2dc3-412d-be4c-f152a8232961\\_en?filename=The%20future%20of%20European%20competitiveness%20-%20A%20competitiveness%20strategy%20for%20Europe.pdf](https://commission.europa.eu/document/download/97e481fd-2dc3-412d-be4c-f152a8232961_en?filename=The%20future%20of%20European%20competitiveness%20-%20A%20competitiveness%20strategy%20for%20Europe.pdf)
- 3 Ursula von der Leyen: 'Europe's Choice: Political Guidelines for the Next European Commission 2024–2029' 18 July 2024, p. 26.

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