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After the storm: The EU in uncharted waters

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Russia's full-scale invasion of Ukraine upended the existing world order and put into question some of the fundamental principles governing the international system. At the same time, the beginning of the war marked a turning point for the EU's geopolitical ambitions.

While playing a decisive role in breaking some of the EU's long-standing foreign policy taboos, the war also brought to light structural problems and inconsistencies among its member states. Already fatigued by several sudden shocks and major crises, the EU is now confronted with multiple challenges, spanning from the most direct consequences of the ongoing war in Ukraine to the establishment of a more competitive world order where its interests and values risk being neglected.

With less political and economic clout, the EU's global role might shrink, its capacity to shape the world order narrow, and its international legitimacy dwindle. While this could result in a more muscular approach to power, the EU must cope with a series of internal and external transformations, as well as centripetal and centrifugal forces that will inevitably change its future course.

A key question remains: Is the EU ready and equipped to hold its own in a new era of geopolitical and geoeconomic competition?

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“And once the storm is over; you won't remember how you made it through, how you managed to survive. You won't even be sure, whether the storm is really over. But one thing is certain. When you come out of the storm, you won't be the same person who walked in. That's what this storm's all about.”

— Haruki Murakami

A watershed moment for Europe

The world is changing, and so is the European Union (EU). We are surrounded by crises within and beyond our own borders. Nevertheless, it always appears as though we are unprepared or caught off guard. Whatever their nature, coming one after another or all at once, crises are not an anomaly of history, but the culmination of a series of events that are often as evident as the risks they bring.

Crises, however, can make us re-evaluate our decisions and actions. Solving them requires substantial resources, a great deal of imagination, and sometimes extraordinary measures. For better or worse, crises are catalysts for transformation, transition, and adaptation.

There was no more defining moment for the EU's geopolitical ambitions than Russia's invasion of Ukraine in February 2022.

For the EU, the past decades offered no shortage of sudden shocks and major crises, from the long-term effects of the late 2000s financial and debt crises, through the repeated migration and displacement emergencies, Brexit, and the global Covid-19 pandemic. Yet, although each of them has arguably had a major impact and reshaped the EU's global role, there was no more defining moment for the EU's geopolitical ambitions than Russia's invasion of Ukraine in February 2022. The EU itself acknowledges how the threat and needs stemming from the war in Europe played a decisive role in breaking some of its long-standing taboos in foreign policy.¹

It is, therefore, crucial to assess whether this wake-up call will contribute to the realisation of the EU's geopolitical ambitions. Is the EU ready and equipped to hold its own in a new era of geopolitical and geoeconomic competition?

The EU at an ideological crossroads: *quo vadis* EU?

Over the years, the power of the EU has been defined in many different ways – from normative,² to civilian,³ regulatory,⁴ post-modern,⁵ soft⁶ or ethical⁷. All these qualifications were used to describe how the EU embodied a new approach to international relations.

Hard power has barely been on the agenda of the EU. Its member states kept it predominantly in their hands, only enabling marginal debates in the public discourse of the Union. And yet, the EU has been able to shape the international order and norms, partially with its economic clout, and partially with its rising diplomatic outreach, leveraging the projection of its individual member states.

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Whether through its member states or its policies, Brussels has consistently behaved as a geopolitical actor with vested interests. For instance, its trade policy has always been characterised by geopolitical goals, spanning from the environmental to the agricultural and financial sectors.⁸ The same can be said of the geopolitical lever of its enlargement policy and development aid. Access to its large single market has been used as a foreign policy tool to set global standards. However, the EU's global power projection has largely been a primary emanation of its economic influence, leading the Union to often prioritise economic achievements over more ambitious domestic and foreign policy goals, privileging soft power over hard power.⁹

This latter option may no longer remain the defining trait of the EU's global role. The making of the EU as a soft power was inherently tied to a US-dominated international system, while the rise of a new global power – China – and more regional ones – above all India, and Türkiye – was yet to come. Notwithstanding the significant economic and political might still residing within the EU, the global diffusion of power and resulting shifts in world order have progressively eroded the domains where the Union enjoys substantial power concentration.

Confronted with mounting challenges and the return of great power rivalries, Commission President Ursula von der Leyen declared in 2019 she would lead a “geopolitical Commission”.¹⁰ Her purpose added a new, pragmatic page to the EU’s ideational history, which has often been strictly associated with the development of its single market and ‘low politics.’

In light of this new level of awareness, the current call for a geopolitical EU reflects simultaneously the response to the increasing sense of vulnerability to international shocks and return of power politics, and the acknowledgement of the Union's reduced capacity to shape the world alone, starting in its own neighbourhood. It signals the end of an EU that looks at the world beyond power dynamics, where its interests and values should be promoted through new and alternative means.

The idea of a geopolitical Europe “requires a conceptual rupture” before being translated into concrete actions and a set of common policy priorities.

Is therefore the “birth of a geopolitical Europe”¹¹ also the birth of a new doctrine that will transform the core tenets of the so-called “quiet superpower”?¹² If so, it is not sufficient to consider this change as the latest stage of the evolution of the EU, since the idea of a geopolitical Europe “requires a conceptual rupture”¹³ before being translated into concrete actions and a set of common policy priorities.

The ascendance of power politics amid dwindling influence

The EU, on a variety of fronts, is growing proportionally slower than other regions in the world. The Union has shrunk as a percentage of the world economy. Numbers are even more alarming on the demographic front, with Europe’s population ageing rapidly. In the race to control key technologies, the EU is lagging behind the US and China, while its dependency on imports of critical raw materials poses a major risk to its economic security and prosperity. As the EU’s growth slows, its regulatory, procedural, and standardisation power also appears to have reached its peak. All this may have a significant impact on an entity that has often pressured member states and third countries to adopt specific policies by using mostly economic and financial tools.

With less political and economic heft, the EU’s role might shrink, its capacity to shape the world – especially beyond its immediate periphery – narrow, and its international legitimacy dwindle. At a time when soft power no longer suffices, the civilian or normative power of the EU risks being neglected. If the soft power tools that have allowed the EU to embrace an alternative course in international relations are replaced by a Union adopting more traditional power politics, what would that look like? Will it still be able to sustain – as it did in the past – its primacy in setting and preserving global standards, values, and norms?

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While it is unlikely that the EU’s reaction to decline will be driven by a pure hard power element and completely ignore its soft power dimension, wearing the geopolitical mantle cannot happen overnight; especially if the EU’s ideological premises and institutions remain as they are now.

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The current state of the EU is not far from developing a stronger and more strategic integration of hard power means. Brussels can rely on some strong fundamentals: it is home to some of the world’s largest economies with wide-reaching diplomatic networks, and its member states have taken steps to increase their national defence budgets in response to Russia’s aggression against Ukraine. Yet, the current reality on the ground tells another story: rife with divisions, the EU does not speak with a single voice and its political, economic, and military strength, which rely on vast and fragmented resources, are hardly well placed to serve its geopolitical ambitions.

It is not without reason that both Finland and Sweden have decided to join NATO. With a war raging at the EU’s borders, it is NATO, with the security warranty of the US, that remains the undisputable guarantor of Europe’s territorial defence.

The renaissance of modern geopolitics: The EU in a divided and divisive world

The global balance of power has changed, and what remains is a ‘wounded’ multilateralism working alongside an ascendant multipolarity. Not only is the distribution of power changing but the shift exposes new or alternative ideas, norms, standards and principles governing the global order.

The EU has predominantly followed a distinctive path in international relations. It has regarded the world, essentially, as a place where the rule of law and values prevail over power politics and cynical calculations, and where there is limited space for superpower competition. But recent episodes have pushed the EU to revise its view of the world, even to the point where the EU’s High Representative Josep Borrell has stated that the Union “must learn quickly to speak the language of power”¹⁴ to avoid being left behind – even before the latest Russian invasion of Ukraine.

The rise of the notion of a geopolitical Europe comes at a difficult historical juncture for the Union.

The rise of the notion of a geopolitical Europe comes at a difficult historical juncture for the Union. The systemic shifts and internal challenges – like Brexit, the democratic backsliding in Poland and Hungary, and growing rifts among member states – have weakened the EU and made it more vulnerable to external factors like economic coercion, disinformation and other forms of foreign interference.

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Against this backdrop, the purpose of a more geopolitical Europe is born as the EU strives to maintain relevance and influence in a world where it risks becoming less relevant, if not side-lined. The geopolitical turn, therefore, looks more like a reaction to the increasing sense of insecurity and diminished influence than a proper evolution of

the EU’s institutional and conceptual framework, the response to an identity crisis, rather than the development of a new identity.

Global governance itself is caught in the midst of centrifugal forces, with geoeconomic and geopolitical fragmentation on the rise. Countries worldwide are turning inwards to address their domestic challenges and economic volatility. This fragmentation involves many domains, from security to supply chains and financial regulations. The liberal mantra of economic interdependence inducing peace is being questioned more and more every day. By learning the hard way the risks of excessive interdependencies, the EU is adopting more defensive policies to respond to shifts in the tectonics of international politics.

Adherence to the set of post-World War II international values enabling global coexistence is vanishing, aggravated by the dysfunctional and precarious state of multilateralism and global governance. If great powers tend to ignore the basic foundations of the post-war liberal global order, middle ones have been increasingly diffident in accepting them as set rules for how to run their internal and external political and economic affairs. The hypocrisy, double standards and inconsistency in promoting the rule of law and human rights have often depleted and discredited the soft power dimension of the West, undermining confidence in the so-called liberal international rules-based order.¹⁵

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In an increasingly polarised world, the West is no stranger to using divisive language. The recent oversimplification of ‘democracy versus autocracy’ or the mere concept of ‘like-mindedness’ also contribute to splitting the world in two camps. Yet, the world is more complex than dichotomies. Several democracies do not necessarily consider the current international system fit for their ambitions and interests, as they do not share the same concerns as those who built it

first, having different cultural, economic, and political backgrounds. The reluctance of many democratic states to condemn or sanction Russia for its invasion of Ukraine is a case in point.

Geopolitical EU: The long and winding road ahead

Russia's invasion of Ukraine has brought large-scale war back to Europe. As with all crises, not only do they bring opportunities to rethink and re-imagine the economic, social, and political systems people live in, they also expose systemic and conceptual weaknesses. As a response to the war, in certain fields, the EU has made great progress and broken more taboos over the last few months than it has in the past few decades. However, unity will remain fragile as long as institutional reforms are unaddressed and key divisions persist among member states.

If it is true that foreign policy begins at home, to become a credible geopolitical actor, the EU should put its own affairs in order first. This is especially because the EU institutions do not live in a vacuum, but rather in a context whereby technical expedients (e.g., reform of the decision-making process) or policies (e.g., increasing military spending) mean nothing if they are not underpinned by a concrete vision of where the EU and its member states should be heading.

Since the European project was originally conceived as a means to overcome power politics that brought an entire continent and most of the world nothing but war, famine and destruction, 'learning the language of power' requires a giant leap and a cultural and ideological reconceptualisation of those principles that have been guiding the EU in its domestic and foreign policies so far. The precondition for a credible EU abroad lies in its unity at home; in the constant tension between the interests of the member states and those of the Union, the future resilience and autonomy of the EU and its institutions will play out. Political courage, and more decisive leadership are also crucial; after all, power is not only a matter of capabilities, but also the willingness to mobilise them rapidly to achieve specific objectives.

In this context, the EU should define its place and role in a changing global order and determine how it can stay relevant in a context of diminishing influence,

scarcity of resources, and weaponised interdependence. It must frame a long-term global security and economic strategy that meets the costly demands of the unfolding new reality of the geopolitical age. In doing so, the Union should consider whether its nascent geopolitical awareness is the result of an EU that wants to shield itself from a world increasingly seen as a threat to its interests, or whether it is guided by the ambition to continue to exert influence and promote and uphold its interests and values. Even if not mutually exclusive, it would be extremely difficult to find the right balance between being open to the world sufficiently enough not to be vulnerable. In particular, the increasing scepticism of interdependence, in parallel with a decline in its economic heft might lead the EU to become a more marginal player, with its power projection encountering more limits than opportunities in the future.

The EU should define its place and role in a changing global order and determine how it can stay relevant in a context of diminishing influence, scarcity of resources, and weaponised interdependence.

With war leading the EU into stormy waters, Brussels seeks to navigate the uncharted waters of geopolitics. Still, the deterioration of the current international system and Russia's aggression against Ukraine have brought not only uncertainties but also momentum to rethink the potential evolution of the Union.

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A day will come when the war will end; it is hard to predict what trajectory the EU will decide to follow then. Whether as a fully-fledged geopolitical organisation or an entity continuing to navigate and react from crisis to crisis, whether carried by the wind or steering its own course through the storm, the EU will certainly be a different actor.

About the author

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