

The ‘Geopolitical Commission’: An End of Term Review

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Introduction

When, in November 2019, Commission President Ursula von der Leyen declared that hers would be a ‘geopolitical Commission’ (2019b), she was not only seeking to differentiate her incoming administration from that of her predecessor. She was also making a bold gambit. Without the powerful mandate associated with the election through the *Spitzenkandidaten* process, voted into office by a slender majority, and with no substantial experience at the European Union (EU) level, the 13th and first female President was taking a risk. Beyond the question marks against the authority of the incoming Commission President, foreign policy, defence and security are areas where the Commission’s powers have been limited and often indirect and where, with few resources, it is reliant on other actors inside and outside the EU.

Seen from its term end, however, the von der Leyen Commission has been very successful at extending the Commission’s influence and expanding EU competence in security, defence and the protection of the EU’s economic interests. The concept of the ‘geopolitical Commission’ (Baracani, 2023) and its associated policy agenda also grew between the presentation of her Political Guidelines (2019a) as candidate for Commission President and the record of achievements posted by her administration at its close (Commission, 2024a). Taking stock of these developments, this article reflects on the origins and evolution of the ‘geopolitical Commission’. It discusses the Commission President’s personal style and entrepreneurship, the contingency that allowed for the concept’s expansion and the institutional conditions that were propitious to von der Leyen’s success. It concludes with a reflection on possible future developments.

The article makes three main arguments. The first is that although the preceding Commission was styled as a ‘political Commission’, with mainly domestic policy priorities, the Juncker Commission took important steps that anticipated and laid the foundations for the ‘geopolitical Commission’. The second argument is that the von der Leyen Commission built on her predecessor’s legacy, but also added new geopolitical elements, such as the reorientation of EU development policy through the ‘Global Gateway’ (Heldt, 2023), a ‘Global Human Rights Sanctions regime’ and working for peace and justice in the Middle East. The third argument is that the Commission’s success can be attributed to a combination of the experience and the energetic personal style of the President herself (Kassim, 2021, 2023a, 2023b), a series of external challenges that put the EU into permanent crisis mode from early 2020 and the readiness of other key figures and institutions to allow the Commission President to assume a leadership role.

The discussion below is organised into four sections. The first reviews the ‘geopolitical’ measures adopted by the Juncker Commission. The second considers how, from an

unpromising start, von der Leyen emerged as an effective leader. The third examines how the idea of the ‘geopolitical Commission’ and its operationalisation expanded dramatically throughout von der Leyen’s mandate, particularly following Russia’s war of aggression against Ukraine. The fourth section reflects on the factors, including inter-institutional and intra-organisational, that made the ‘geopolitical Commission’ possible.

I. The Juncker Presidency: A ‘Geopolitical Commission’ Avant la Lettre?

Although often overlooked in the scholarly literature, the Juncker Commission played a major role in extending the EU’s capacities in defence and security, adding a geopolitical element to the EU’s approach to Eastern Europe and protecting the EU’s economic interests in trade and beyond. Entering office 8 months after Russia’s annexation of Crimea (March 2014), the Juncker Commission continued to apply restrictive measures on Moscow and to provide support for Ukraine (see Kassim and Tholoniati, 2021). Having underlined it as a theme in his Political Guidelines (2014), Juncker continued to argue that the EU should be able to defend itself (2016, 2017). The Brexit vote in the United Kingdom and the Trump Presidency in 2016 served only to reinforce his case.

In the face of common threats from the East and the South, the Juncker Commission stepped up the EU’s co-operation with North Atlantic Treaty Organisation (NATO) (Hoeffler and Hofmann, 2024). A Joint Declaration between the EU and NATO in 2016 was followed by common proposals covering counter-terrorism, peace and security, military mobility, cyber security and defence, defence capabilities, the defence industry and countering hybrid threats. The declaration, renewed 2 years later, was one of three key strategic elements in defence and security policy. The others were the EU Global Strategy on Foreign and Security Policy presented by High Representative/Vice-President (HR/VP) Federica Mogherini in June 2016 and the Commission’s December 2016 European Defence Action Plan, which sought to encourage collaborative member state defence capabilities, with the support of a new European Defence Fund (EDF) (Haroche, 2020, 2023). Three months after his call to create ‘a fully-fledged European Defence Union’ by 2025, Juncker welcomed the European Council’s (EUCO) decision to establish the Permanent Structured Cooperation in Security and Defense (PESCO), provided by the Lisbon Treaty. PESCO allows member states to develop joint military capabilities and invest in shared projects.

More broadly, following the January 2015 shooting at the Charlie Hebdo offices in Paris, the Commission issued a ‘European Agenda on Security’, which set out a common European approach to counter-terrorism (Kassim and Tholoniati, 2021). A new ‘security taskforce’ created in the Commission proposed initiatives to restrict access to firearms, improve the interoperability of member state information systems, counter money laundering and strengthen cybersecurity. The following year, the Commission and the HR/VP adopted a Joint Framework on countering hybrid threats.

Action by the Juncker Commission in three further areas is also noteworthy. First, in line with the Commission’s traditional defence of free trade and the multilateral system, Juncker sought to avert a trade war with the United States (US) following the imposition by the Trump administration of tariffs on imports of EU steel and aluminium. As well as agreeing on a deal with the US President to work towards ‘zero’

tariffs, barriers and subsidies, he stepped up defence of the multilateral trading system, and free and fair trade, whilst calling for reform of the World Trade Organisation, and strengthened the EU's defence against dumping and subsidies. Second, Brexit, Trump and what Juncker saw as unfair practices on the part of China provided the stimulus for a wider reflection in the Commission on the need for the EU to protect its position in the world (Juncker, 2017, 2018). In a geoeconomic turn, where the economy becomes 'a battleground for geopolitical competition' (Matthijs and Meunier, 2023), the Commission began to develop a more strategic approach to trade aimed at protecting supply chains and reducing the EU's dependence on hostile powers. It proposed a more cautious approach to foreign investment in key sectors, including the defence industry, and technology and assets, such as ports. A Commission joint paper with the HR/VP described China as 'simultaneously' a 'cooperation partner', 'negotiation partner', 'economic competitor' and 'systemic rival' (Commission and EEAS, 2019). Brexit led the Commission to identify areas where it needed to shore up its interests, including the speedy completion of trade deals and a revival of interest in capital markets. A third action was organisational. The Commission created a directorate for external relations in the Secretariat General in 2018 to provide central strategy and oversight for the international dimension of the Commission's work.

II. From Modest Expectations to a Crisis Leader

When, as candidate President, Ursula von der Leyen declared as an aim 'a stronger Europe in the world', her proposed actions suggested continuation rather than change, including maintenance of a rules-based international order, free and fair trade, strengthening relations with neighbouring regions and a defence union (von der Leyen, 2019a). However, she emphasised that 'Europe must also learn the language of power' since 'soft power is no longer enough'. As well as developing its own capacities in areas, such as security, where the EU was used to relying on others, the EU needed to learn how to apply its 'existing power in a more targeted way in areas where European interests are concerned' (Die Welt, 2019).

Whilst the Commission's geopolitical policy agenda expanded throughout her Presidency, concerns about the Commission President's authority were assuaged soon after the new President took office. Von der Leyen's route to the post suggested a fragile mandate. Although she had held ministerial positions, she had not served in senior positions and lacked EU experience. However, it soon became evident that the model of presidential leadership introduced by Juncker, where the Commission President identifies the institution's policy priorities and decides on the structure and operation of the College, had become institutionalised (Kassim, 2021, 2023a, 2023b). Like her predecessor, von der Leyen used mission letters to communicate her aims for the coming term, the individual responsibilities of prospective members of the Commission and the Commission's functioning.

Organisationally, von der Leyen moved, first, to strengthen the co-ordination of the external aspects of the Commission's work by creating a Group for External Coordination that, on a weekly basis, would validate the Commission's positions on international policies for the College, thereby ensuring consistency in messaging on external issues and aligning the internal and external dimensions of the Commission's work

(Commission, 2019, pp. 14–16). A ‘Tuesday meeting’ at the service level chaired by the Secretariat General, ensuring that all Commission departments are aware of the institution’s external agenda, precedes a meeting co-chaired by the diplomatic adviser of the president of the Commission and the deputy director of the HR/VP cabinet. As Haroche (2023, p. 978) notes, ‘this ambition can be interpreted as one step in a longer-term strategy seeking to “recover what [the Commission’s] DG RELEX was doing” before the creation of the EEAS in 2010’. Second, in an area where member states had jealously guarded their prerogatives, von der Leyen created a directorate-general for Defence Industry and Space (DG-DEFIS) in the Commission for the first time, thereby establishing an expectation that her Commission would be proactive. Third, following the United Kingdom’s withdrawal from the EU, the Commission consolidated responsibility for relations with Western Europe in a single directorate (SG H) in the Secretariat General. This move underlined the intent to take a strategic view of its relations with Switzerland and the United Kingdom and positioned its administrative capacity close to the Commission President rather than in the European External Action Service (EEAS) or DG European Neighbourhood Policy and Enlargement Negotiations (NEAR).

Regarding the Commission President’s wider authority, with the outbreak of the Covid-19 pandemic at the beginning of 2020, von der Leyen quickly demonstrated herself to be an effective crisis leader (Kassim, 2023a, 2023b). Her concentration of decision-making within a narrow circle of trusted collaborators on the 13th floor of the Berlaymont proved well suited to crisis conditions. Von der Leyen responded quickly to signs of impending threat, mobilised resources and demonstrated her creativity in formulating actions to address for not only immediate challenges but also the medium and long terms. She used interventions in EUCO meetings to persuade national political leaders and showed herself to be an excellent media performer.

At each stage of the crisis, von der Leyen presented herself as a ‘guardian of solidarity’ (Matthijs and Meunier, 2023), developing and tabling collective solutions that demonstrated the added value of EU-level action. Initially, she proposed practical measures to protect public health, but she broke new ground with innovations, including the SURE programme to support employment, the game-changing Recovery and Resilience Facility – centrepiece of the Next Generation EU programme – to mitigate the economic damage caused by the pandemic and the joint procurement of Covid-19 vaccines.

From the outset, von der Leyen was also attentive to the external environment. Concerned to contain vaccine nationalism within the EU, she was also keen to avoid vaccine imperialism. The Commission co-operated closely with the World Health Organisation. It promoted donor initiatives, such as the Coronavirus Global response, and provided humanitarian assistance, development aid and support for healthcare systems in countries outside Europe through programmes such as Team Europe (Koch et al., 2024). It also joined the Covid-19 Vaccines Global Access (COVAX), a multilateral effort to supply vaccines to developing countries.

III. War Leader: Russia’s Invasion of Ukraine

When Russia invaded Ukraine in February 2022, von der Leyen showed the same combination of dynamism and proactive thinking as with the pandemic. She was also able to draw on the experience, reputation and network of contacts she had gained as German

defence minister. Her knowledge of NATO was especially important in co-ordinating action with the EU, and she became President Joe Biden's main European interlocutor.

At the end of December 2021, the von der Leyen cabinet, with the support of the Secretariat General and in co-operation with the White House, had already prepared sanctions against Russia, which made it possible for the EU to quickly adopt four initial packages. It was the Commission rather than the ambassadors in the Political and Security Committee who took charge of sanctions and, in contrast to 2014, the Commission, rather than the national capitals, that made the running on further rounds. Even though the crisis precipitated by Russia's invasion of Ukraine on 24 February 2022 fell within the high politics domain where the EUCO could be expected to take the lead, it was the Commission President who shaped the EU narrative. Condemning Russia's actions, von der Leyen framed the threat posed by Moscow as existential for the EU and a challenge to fundamental European values. She led the call for economic sanctions and proposed measures that not only strengthened the EU's defence and security capacities but also included ambitious plans for enlargement and, even more radically, a programme to end the EU's dependence on Russian energy.

As with the pandemic, von der Leyen proposed a response to the immediate crisis before extending the agenda. Just over a week before the invasion, she had declared that the EU should support Ukraine in the face of Russia's escalation of tension (von der Leyen, 2022a), justifying EU action on the grounds of the need to defend the values of peace, democracy, the rule of law and the principles enshrined in the United Nations Charter. She called for a determined and united response through sanctions and persuaded the 27 heads of state and government (HOSG) to use their economic power through (the now 14 packages of) sanctions prepared by the Commission.

In the following weeks and months, von der Leyen called for further action. First, she pushed for enlargement and urged member states to grant Kyiv candidate status. When President Zelenskyy submitted Ukraine's membership application (on 28 February 2022), she declared that 'a people that stands up so bravely for our European values belongs in our European family' (von der Leyen, 2022b). In a highly symbolic gesture during her visit to Kyiv on 8 April 2022, she presented President Zelenskyy with the questionnaire that the Commission requires to issue its opinion on Ukraine's application for membership, affirming that 'we will accelerate this process as much as we can while ensuring that all conditions are respected' (von der Leyen, 2022c). The Commission President argued on geopolitical grounds for an unprecedented acceleration of the enlargement process. Although unanimity in the EUCO could not be assumed, von der Leyen persuaded the HOSG to grant Kyiv accession candidate status on 23 June 2022 and to decide the opening of accession negotiations on 15 December 2023. The Commission also proposed a reduction in the number of decision-making stages and a new automaticity to the process (interview with senior Commission official, conducted by Kassim, 19 December 2023).

Von der Leyen also argued that the EU should reduce its reliance on Russian oil and gas. The diverse range of resources and models amongst the member states, and the desire of member states to retain control over national energy strategies and markets, had always made common action in energy difficult for the EU. Von der Leyen used two narratives to persuade HOSG: a geopolitical understanding of the implications of Europe's energy dependence on Russia, contending that Moscow could weaponise energy supplies to divide Europe, and emphasising the benefits of the green transition, since 'every kilowatt-hour of

electricity Europe generates from solar, wind, hydropower or biomass reduces our dependency on Russian gas' (von der Leyen, 2022b).

Seven days later, the Commission presented a first proposal to phase out Russian fossil fuels (Commission, 2022a). After securing a political mandate from the EUCO (European Council, 2022), the Commission launched the REPowerEU Plan, aimed at replacing Russian fossil fuels, saving energy and accelerating the clean energy transition (Commission, 2022b). The Commission mobilised close to €300 billion to fund the Plan. As with the Covid-19 crisis, when the Commission required green expenditure of 36% as part of Next Generation EU funding, the Commission made additional funds available under REPowerEU to the member states. Within a year, the Council adopted six sets of legislative measures under the Article 122 TFEU emergency procedure to achieve these goals. By 2024, the Commission (2024b) could report that within 2 years, the EU's dependence on Russian fossil fuels had been reduced, gas consumption had fallen by 18% and, for the first time, more electricity had been generated from wind and solar than gas.

In the area of defence, von der Leyen used the institutional resources of the HR/VP on common foreign and security policy and of the Commission on the EU budget and internal policy areas (research and industry) to set and expand the EU crisis agenda, enhancing the Commission's own role in the process. Before February 2022, von der Leyen had already increased available funding under the EDF from €590 million in 2017–2020 to nearly €8 billion in 2021–2027. The budget, which complements national contributions, turned the EU into one of the leading research investors in Europe. The HOSG also agreed to 'increase substantially defence expenditures', 'develop further incentives to stimulate Member States' collaborative investments in joint projects and joint procurement of defence capabilities' and 'take measures to strengthen and develop our defence industry' (European Council, 2022, p. 16). The Strategic Compass for Security and Defence, adopted by the Council 10 days later and endorsed by the EUCO on 24 March 2022, also emphasised the need to increase defence spending and invest more in capabilities.

The HOSG's invitation to the Commission 'to put forward an analysis of the defence investment gaps by mid-May and to propose any further initiatives necessary to strengthen the European defence industrial and technological base' (European Council, 2022) offered the von der Leyen Commission the opportunity to table proposals to strengthen the European defence industry. Since the member states had previously preferred to use the European Defence Agency, created in 2004, EUCO's decision marked a turning point for the Commission. The Commission duly presented its analysis, which highlighted investment, capability and industrial gaps. Two months later, it proposed a European Defence Industry Reinforcement through the Common Procurement Act (EDIRPA) to provide partial reimbursement from the EU budget to a consortium of at least three countries collaborating to acquire the most vital and urgent defence equipment. Based on Article 173 TFEU, this instrument entered force in October 2023 with a budget of €300 million.

A further landmark saw the EU support the supply of lethal weapons for the first time in its history. In response to a request made by President Zelensky to the President of the European Council (PEC) Charles Michel on 26 February 2022, the Secretary General of the EEAS, Stefano Sannino, suggested the use of the European Peace Facility (EPF) for

this purpose (Stroobants, 2022). The EPF, initially proposed by the HR/VP in 2018, was created by the Council in March 2021 to cover the costs of military missions under the EU's common security and defence policy (CSDP), as well as to support military and security capacity-building by partner countries and international organisations. The EPF replaced the Athena Mechanism and the African Peace Facility. Financed by member state contributions and off-budget funds, its initial financial ceiling of €5.69 billion was later increased by the Council to over €17 billion for 2021–2027. The day after Zelensky's request, member states agreed to HR/VP Joseph Borrell's proposal to use the EPF to finance the purchase and delivery of weapons and other equipment to a country under attack. Funding is implemented through a complex system of ex-post reimbursement of the costs sustained by member states that provide weapons to Ukraine and is managed by the Commission's Service for Foreign Policy Instruments. €11.1 billion has been mobilised between 2022 and 2024 to support the Ukrainian armed forces.

Meanwhile, on 20 March 2023, following Ukraine's urgent request for military assistance, the Council agreed on a three-track approach to provide one million rounds of artillery ammunition within 12 months. It tasked the Commission with proposals on stepping up the manufacturing capacity of the European defence industry, including through the use of the EU budget (Council of the EU, 2023). Two months later, based on Articles 114 and 173 TFEU, the Commission proposed the Act in Support of Ammunition Production (ASAP) to support and accelerate the immediate increase of ammunition and missile production, with a 2-year financial envelope of €500 million from the EU budget.

IV. Geoeconomics and the Geopolitical Commission

The von der Leyen Commission also continued and significantly expanded the action taken by the Juncker Commission to protect the EU's economic interests in a climate of growing geopolitical tension. In addition to competition from China and Russian aggression, the EU confronted a new challenge in the form of state interventionism in the United States, where the Biden administration introduced the Industrial Recovery Act that included subsidies for green investment.

The von der Leyen Commission acted in two areas. First, it proposed measures to defend fair trade to ensure reciprocity with its partners so that EU companies compete on an equal basis with non-EU companies and to protect EU interests. Examples of the former include the international procurement instrument, adopted in 2022, which allows the EU to retaliate when third countries deny EU companies fair access; the foreign subsidies regulation (FSR), which enables the EU to prevent market distortions caused by subsidies to firms from third countries that compete with EU companies on takeover bids or public procurement; an anti-coercion instrument, which allows the EU to retaliate against third countries that use economic pressure in an attempt to interfere with national politics; and a corporate sustainability due diligence directive (CSDDD) to ensure that forced labour is not part of the value chains of EU companies. More broadly, the Commission proclaimed in its first economic security strategy EU commitment to multilateral co-operation and the rules-based international order, but also that it would look to trade with like-minded countries.

Trade defence measures to protect EU interests include the investment screening framework, first proposed by the Juncker Commission, which came into operation in 2020. It aims to help EU governments review foreign investment by third countries to identify and block investments that undermine national security. Other measures include challenges to business that assist Russia in circumventing EU sanctions.

Many of these measures are responses to concerns about a lack of reciprocity in the EU's trade with China, reflecting a change in perception of the country from 'an export market that supports EU jobs' to 'a competitor with harmful industrial overcapacity and unfair trading practices' (Bohnenberger, 2024), and a strategic decision on the EU's part to 'de-risk' the relationship. DG Trade has reviewed distortions in trade with China, and the Commission has taken action on several fronts (Bohnenberger, 2024). Provisional duties were imposed on electric vehicles (EV) from China – a particular concern – and customs authorities registered EV imports from China to allow tariffs to be imposed retroactively. China has already started to retaliate (see Beattie, 2024).

Second, alongside these trade measures, the von der Leyen Commission launched a new industrial strategy in 2020, updated in 2021 to take into account the pandemic's effects and ensure the resilience of the single market. Action to support the transition to a green and digital economy includes the Chips Act, the Green Deal Industrial Plan, the Net Zero Industrial Act, funding from Horizon Europe, REPowerEU, InvestEU and the Innovation Fund and relaxation of EU state aid rules. To protect and improve the competitiveness of EU industry, the EU has adopted the carbon border adjustment mechanism and Strategic Technologies for Europe Platform. Measures have also been taken to strengthen the EU's open strategic autonomy, by diversifying international partnerships, selective industrial alliances, and limiting EU dependence in strategic sectors (e.g., through the Critical Raw Materials Regulation). These changes mark a dramatic shift from market-making and polity-building to market activism (McNamara, 2023).

V. Accounting for the 'Geopolitical Commission'

By the time von der Leyen entered the final weeks of her mandate, the bounds of the 'geopolitical Commission' had extended beyond those she had outlined for a 'stronger Europe in world' in her political guidelines. The Commission's lists its achievements under 12 headings (Commission, 2024a). This expansion can, to a large degree, be attributed to the leadership style and experience of the Commission President. As a woman of action in constant contact with national capitals, von der Leyen has taken a personal approach to decision-making in consultation with a few members of her cabinet on the 13th floor. Her 'hands-on' style has been strongly evident in external policy, where von der Leyen has been high visible and often on the spot. Although this style has proved well suited to an era of crisis, it has at times provoked dissent within the College, led to the charge that the President does not make effective use of the institution's expertise and at times produced mishaps (Kassim, 2023a).

Moreover, three contextual factors have also been important. The first is her inheritance from the Juncker Commission, described above. The second is contingency. von der Leyen established her credentials as a crisis leader with the outbreak of Covid-19, after an uncomfortable start when voices inside the administration had complained about the speed with which the Green Deal was being pushed through. The pandemic not only

enabled von der Leyen to establish her reputation, but she could also apply lessons learned from the pandemic when Russia invaded Ukraine. Russia's aggression, meanwhile, made it possible to broaden and deepen action in defence and security (Håkansson, 2021, 2024).

A third contextual factor was the leadership of other EU institutions. Von der Leyen enjoyed good relations with the Presidents of the EP, David Sassoli and Roberta Metsola. She worked hard to cultivate MEPs and presented proposals first to the EP to mobilise support. She also enjoyed a productive working relationship with the EEAS, despite some areas of friction, such as over the management of the EU's post-Brexit relationship with the United Kingdom.

Von der Leyen's relationship with Charles Michel, the President of the EUCO, however, was not so strong. Whereas previous Commission Presidents had established a *modus operandi* with their counterparts, Michel and von der Leyen clashed from the beginning. Yet it was the President of the EUCO's relative passivity and his practice of inviting the Commission President to speak first in EUCO meetings that allowed von der Leyen to point to Commission actions as facts on the ground and, particularly during crises, to propose solutions.

Conclusion

Three arguments have been presented above. The first is that Juncker's 'political Commission' staked out important ground for von der Leyen's 'geopolitical Commission' and Juncker's 'political Commission'. Second, the von der Leyen Commission not only significantly expanded the scope of the Commission's action in these areas but also introduced innovations of its own. Third, its success can be attributed to the dynamism of the Commission President and certain propitious conditions.

Looking to the future, it seems unlikely that the same inter-institutional context that allowed the von der Leyen Presidency to set the EU's geopolitical Commission will be sustained, despite the ambitions that von der Leyen outlined during her campaign. Whilst the membership of the EP is more widespread and more divided, it would be unlikely that Antonio Costa, the incoming PEC, will offer his Commission counterpart the same latitude as his predecessor. It is also unclear whether the Commission President will be able to adopt the same 'Olympian' approach (Kassim, 2021) to the Presidency as in her first term. Since the Commission President is a 'constrained selector' (Scherpereel, 2023), with her choice of members of the Commission limited to the nominees forwarded by national capitals, where governments of diverse political stripes are in power, individual Commissioners may be more insistent on holding full discussion of key decisions in College.

Finally, although the continuation of the war in Ukraine, China's growing global influence and a second Trump victory are likely to contribute towards greater unity, national leaders may feel constrained domestically about what action they can take at the EU level. Only Emmanuel Macron, during von der Leyen's first Presidency, seemed prepared to campaign pro-actively for European solutions. With the continued rise of Eurosceptic parties and their presence in government, fewer member states may be ready to accept the collective solutions proposed by a Commission President who has sought to promote unity and solidarity in the face of crisis.

ACKNOWLEDGEMENTS

Open access publishing facilitated by Università degli Studi di Bologna, as part of the Wiley - CRUI-CARE agreement

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