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How EU Foreign Policy Turned Regional

Francesco Siccardi

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Contents

Introduction	1
The Shifting Priorities of EU Foreign Policy	2
Diplomatic Tools	3
Instruments of Direct Engagement	8
Where Is the EU Directing Its Attention?	15
Conclusion	19
About the Author	21
Notes	23
Carnegie Europe	27

Introduction

Where in the world is the EU?

This question is crucial for anyone interested in charting the European Union's level of global engagement and influence. It is also a question that deserves renewed attention today, when the international order—and Europe's place in it—is undergoing a series of seismic shifts.

This study tries to provide an answer by analyzing the first mandate of the European Commission of President Ursula von der Leyen, which spanned from December 2019 to November 2024. By looking at a series of foreign policy indicators and comparing them with the two previous commission terms, it reveals how the EU has adapted to the challenges and crises that have emerged over the years.

The conclusions are threefold: First, the focus of the EU's external action during the first von der Leyen commission took a decisive turn toward the union's neighborhood. Second, within this refocusing, the emphasis shifted decidedly to countries in Europe's East—from Ukraine and Moldova to the South Caucasus and the Western Balkans—at the expense of Turkey, Egypt, and other countries in the Middle East and North Africa (MENA). Farther away from the union's borderlands, Central Asia and the Persian Gulf also saw an uptick in their relations with the EU. The third conclusion is that the EU is still a global player when it comes to the use of certain foreign policy tools—but its engagement with the rest of the world has been reduced in uneven ways, depending on the regions considered.

The Shifting Priorities of EU Foreign Policy

In April 2015 and April 2020, Carnegie Europe published two studies that analyzed the EU's global footprint. The first article took stock of the second term of the commission led by former president José Manuel Barroso, which ran from February 2010 to October 2014.¹ The second looked at the commission of Jean-Claude Juncker, which was in power from November 2014 to November 2019.²

This paper is the third chapter in the series. It analyzes the first mandate of the von der Leyen commission by looking at the same tools of diplomacy and operational engagement as the two previous studies. The diplomatic tools include the foreign visits of top EU officials, the declarations of the union's high representative for foreign affairs and security policy (HR/VP), and the conclusions of European Council and Foreign Affairs Council meetings. The instruments of operational engagement comprise sanctions, civilian and military operations, deployments of EU special representatives, trade agreements, development assistance, and the EU diplomatic corps.

These indicators give an insightful, albeit partial, perspective on the EU's place in the world and the way the union's foreign policy priorities have changed in the last fifteen years.

At the time of the second Barroso commission, the European External Action Service (EEAS) was just being established. The HR/VP at the time, Catherine Ashton, had to dedicate much time and energy to nurturing the newborn European diplomatic service and implementing the foreign policy reforms brought about by the 2009 Lisbon Treaty. During her mandate, the EU had to deal with the Arab Spring uprisings in the early 2010s, Russia's first invasion of parts of Ukraine in 2014, the crisis in relations between Kosovo and Serbia, and the negotiations on Iran's nuclear program, which led to the 2015 signing of the Joint Comprehensive Plan of Action (JCPOA).

With the EEAS up and running, Ashton's successor, Federica Mogherini (2014–2019), had more opportunities to travel outside Brussels. During her tenure, the Juncker commission had to handle the disruption brought about by U.S. President Donald Trump's first term. The need to respond to the rise of China and to the refugee and migrant crisis that peaked in 2015–2016 also dominated the EU's external agenda. And while the union's 2016 Global Strategy articulated the bloc's international ambitions, the United Kingdom's (UK's) decision to leave the EU, following a referendum the same year, was a landmark event that absorbed an increasing amount of European leaders' attention and had an impact on the way EU foreign policy was conducted.³

Brexit remained a recurrent topic in EU foreign policy debates during the first von der Leyen commission. Two months into her mandate, the UK officially left the union, leaving then high representative Josep Borrell with the challenging task of reimagining the bloc's foreign policy without one of its heavyweights. In March 2020, the focus shifted again when the COVID-19 pandemic brought the world to a halt, presenting European policymakers with

the challenge of protecting people and economies while the continent's fragile supply chains were exposed. Two major international crises in Europe and on its doorstep exploded in the second half of Borrell's mandate: Russia's full-scale invasion of Ukraine, which began on February 24, 2022, and Hamas's attacks on Israel on October 7, 2023, which triggered Israel's reaction in the West Bank, Gaza, Lebanon, and the wider region.

These shifting priorities are reflected in the way EU policymakers have used tools of diplomacy and foreign direct engagement over the years.

Diplomatic Tools

The EU's primary methods of diplomacy considered for this study are overseas trips by senior officials, statements by the union's foreign policy chief, and conclusions of major EU summits.

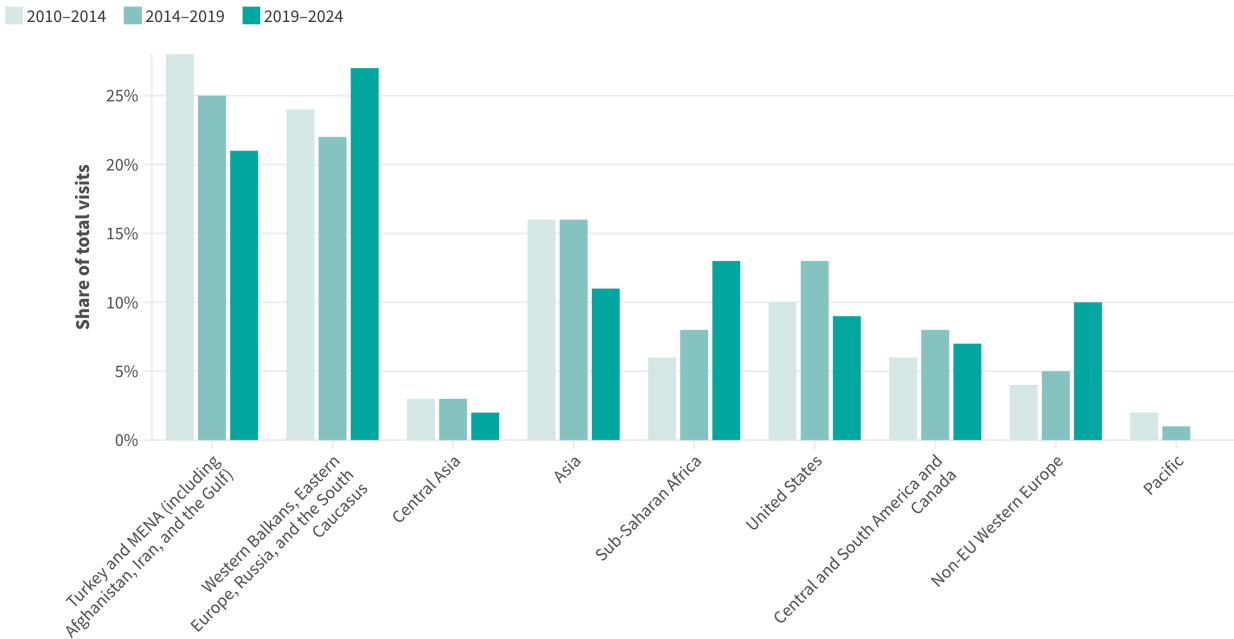
Visits of the EU's Top Officials

The most senior institutional actors of EU external policy are the president of the commission, the president of the European Council, and the HR/VP. At different levels, they interact with foreign leaders and represent the EU on the international stage—not without a certain level of institutional conflict, as emerged during the joint visit by von der Leyen and European Council President Charles Michel to Istanbul in April 2021.⁴ Because international travel is costly and time consuming, these foreign trips are a useful indicator of the priorities of EU foreign policy.

This study tracked the number and destinations of the foreign visits of von der Leyen, Michel, and Borrell in 2019–2024. The number of their combined trips in this period was slightly lower than in the two previous institutional terms. This fall can be attributed to pandemic-related restrictions on international travel, which slowed leaders' agendas for at least a year.

As in 2010–2014 and 2014–2019, the United States remained the most visited country—although this statistic includes trips to the United Nations (UN) headquarters in New York. In 2019–2024, Ukraine was the second-most-visited country, with the UK in third place, reflecting the topics that were most pressing on the EU's agenda. Travel to Eastern Europe in general increased, with more attention dedicated to Moldova, which received nine visits (up from two in the previous period), and Ukraine, which had twenty visits (up from eleven). In the Western Balkans, trips by EU leaders remained frequent, with Albania and North Macedonia the preferred destinations. Conversely, the number of visits to Russia collapsed from eighteen under the second Barroso commission to one under von der Leyen.⁵

Figure 1. Visits of Top EU Officials by Region, 2010–2024



Source: Author's calculations based on European Commission, European Council, and European External Action Service data.

This growing attention on Eastern Europe corresponded with a decrease in visits to the Middle East (see figure 1).⁶ Different trends were at play across this region: The number of visits to Turkey was almost halved from the previous period, while visits to Gulf countries more than doubled.

Overall, travel to countries in the EU's neighborhood accounted for almost half of the total. The impact of Brexit was reflected in the disproportionate growth in trips to non-EU Western European countries. Outside states in Europe's vicinity, Africa became the most visited continent—probably a consequence of the migration challenge, as many African countries are close allies of the EU in curbing irregular arrivals—while travel to Asia and the Americas declined. For the first time, no visits took place to countries in Oceania.

Declarations by the High Representative

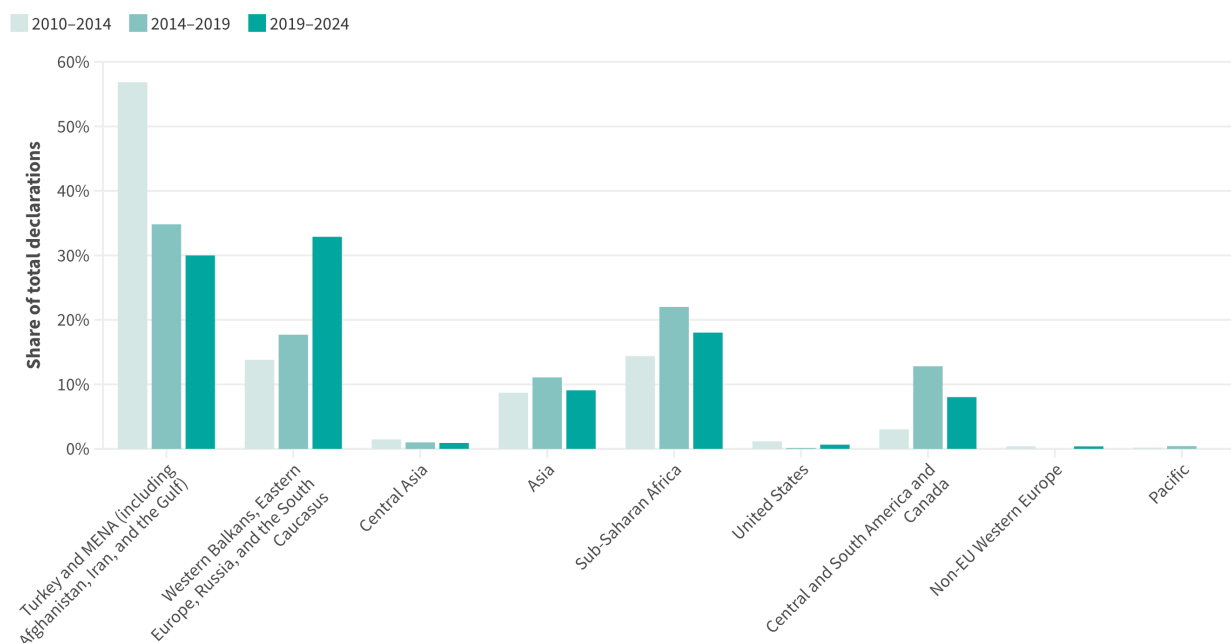
Declarations by the HR/VP are one of the EU's preferred ways to communicate about international events. Borrell used this instrument often—838 times—but not as often as his predecessors Mogherini (917 times) and Ashton (1,022 times). This slight reduction might reflect a growing tendency to engage more widely with social media. It is also notable that during his five years as HR/VP, Borrell maintained a personal blog with hundreds of entries detailing his perspectives on all aspects of his diplomatic work.⁷

This study analyzed the high representative's statements from 2019 to 2024 by tracking references to specific countries and general topics. Not all declarations are the same: Some define the EU's initial reaction to an unexpected development or crisis, while others simply rehash the union's position on a foreign policy topic. Declarations also reflect the interests and priorities of the HR/VP, while summit conclusions are more institutional and are issued only after careful negotiation.

Unsurprisingly, references to Eastern Europe made up the largest share, with 33 percent of the total (see figure 2).⁸ This category accounted for 14 percent of all declarations in 2010–2014 and 18 percent in 2014–2019. Declarations on Russia and Ukraine went up from thirty-five to 139; statements on Belarus more than tripled. Conversely, declarations on the Middle East fell to 30 percent of the total, from 57 percent in 2010–2014. Specifically, statements on Syria and Turkey were reduced by more than half from the previous period, while those on Israel and Palestine almost tripled. Overall, nearly two-thirds of the HR/VP's declarations were dedicated to countries in the EU's neighborhood.

When turning his sights to the rest of the world, Borrell commented most frequently on sub-Saharan Africa (18 percent of the total), with special attention dedicated to Ethiopia and Sudan, where two regional conflicts erupted during his mandate. Asia accounted for only 9 percent of all declarations, with Hong Kong taking the lion's share—a consequence of the protest that continued in the special administrative region throughout 2020.

Figure 2. Declarations by the EU Foreign Policy High Representative by Region, 2010–2024



Source: Author's calculations based on European External Action Service data.

Council Conclusions

Another tool the EU uses to express its positions on international events consists of the conclusions of the European Council and the Foreign Affairs Council. In contrast to the declarations of the high representative, these statements go through several layers of review to ensure the language represents all EU member states. For this reason, council conclusions are not as frequent as HR/VP declarations but carry more political weight.

This study tracked the references to non-EU countries and foreign policy topics in the conclusions of the European Council and Foreign Affairs Council meetings from December 2019 to November 2024. These conclusions contained 373 references to relevant countries and topics, fewer than in 2014–2019. This points to the fact that EU foreign policy making has become more fragmented, with divisions between member states making it more difficult to reach shared conclusions. The difference can also be partly explained by the fact that the Foreign Affairs Council met less often in the von der Leyen commission than in the Juncker commission—forty-eight and sixty-seven times, respectively—a decline probably due to pandemic-related restrictions. The number of European Council meetings remained approximately the same, at twenty-six in 2019–2024 versus twenty-four in 2014–2019.

The main discrepancy between 2014–2019 and 2019–2024 is that under the leaderships of Michel, von der Leyen, and Borrell, 71 percent of the conclusions were on topics related to the EU's Southern and Eastern neighborhoods. These regions accounted for only 50 percent of the total in the earlier period, when Asia, sub-Saharan Africa, and the Americas also featured prominently, together accounting for 47 percent of the total. In 2019–2024, these regions' combined share decreased to 27 percent.

This focus on the EU's East and South is explained by leaders' need to respond to crises on the union's doorstep. Russia's invasion of Ukraine was the most recurrent topic, followed by the conflict in Gaza and the situation in Belarus (see table 1). Migration, which had topped the list under the previous commission, ranked joint eleventh. Other horizontal topics, such as climate change, security and defense, and the pandemic, also featured among the most frequently mentioned issues.

Table 1. Top Countries and Topics in European Council and Foreign Affairs Council Conclusions, 2019–2024

Rank	Country or Topic	Number of References	
1	Russia's invasion of Ukraine (since February 24, 2022)	61	
2	Belarus	22	
3	Israeli-Palestinian conflict (since October 7, 2023)	21	
4	Türkiye	18	
5	Iran	15	
6	Ethiopia	14	
7	Security and defense	12	
8=	Climate change	11	
8=	Western Balkans	11	
8=	Venezuela	11	
11=	Georgia	10	
11=	Lebanon	10	
11=	Migration	10	
14=	COVID-19 pandemic	9	
14=	Libya	9	
14=	Middle East	9	

Source: Author's calculations based on European Council and Council of the European Union data.

Instruments of Direct Engagement

Important types of direct engagement by the EU include sanctions, civilian and military operations, the deployment of special representatives, trade, development assistance, and EU overseas delegations. Other international activities spearheaded by the EU—such as ad hoc financial assistance and agreements, multilateral dialogues, and new foreign policy initiatives—are more difficult to quantify and have therefore been excluded from this study.

Sanctions

Sanctions have traditionally been one of the EU's primary hard-power instruments. Typically, the EU imposes arms embargoes, visa bans, and asset freezes on governments responsible for military conflicts or human rights violations. In some cases, such as Iran, Syria, and Russia, the EU has established a comprehensive sanctions regime that also targets the financial and energy sectors. Parts of these sanctions can be lifted when a political transition occurs, as in Syria in early 2025.

As of November 2024, thirty-four states were subject to some kind of EU sanctions, compared with thirty-three at the end of Juncker's term and twenty-seven at the close of Barroso's tenure.⁹ During the first von der Leyen commission, the EU imposed new measures on Guatemala and Niger, while sanctions on Egypt were lifted.

Although the number of sanctioned countries increased only marginally, the total number of sanctioned designations—entities and individuals—skyrocketed in 2019–2024. The commission's sanctions tracker shows that in this period, the union penalized on average 702 entities and individuals a year, as opposed to ninety-two in 2014–2019 and 141 in 2010–2014.¹⁰ The reason, of course, was the EU's reaction to Russia's 2022 invasion of Ukraine. That year alone, the EU sanctioned 1,348 individuals and 161 entities, most of them linked to Moscow's military aggression against Kyiv. As of this writing, sanctions related to the conflict in Ukraine amount to 46.5 percent of all measures imposed by the EU. Iran (9.1 percent), Syria (7 percent), Belarus (6.7 percent), and al-Qaeda (5.9 percent) complete the top five.

The EU used to coordinate its sanctions policy with the United States. This cooperation diminished during the first Trump presidency and partly resumed under the presidency of Joe Biden.¹¹ In the second Trump administration, sanctions—specifically, economic measures—have become the order of the day.

This shift indicates larger trends at play: Sanctions are an increasingly popular foreign policy tool in a context in which governments have a preference for weaponizing interdependence and disengaging from institutionalized cooperation frameworks.¹² But sanctions are effective

only when widely applied, as with Iran. In the current, fragmented international order, countries are increasingly willing to circumvent sanctions, reducing their effectiveness. This has been the case with measures on Russia and Syria. Sanctions will remain an important instrument, as they offer governments the opportunity to do something about a bad situation. But their heyday might be over.

Civilian and Military Operations

The EU deploys civilian and military missions and operations under the Common Security and Defense Policy (CSDP), which became effective in 2002. At the end of the first von der Leyen commission, twenty-three CSDP missions were underway.¹³ Approximately half of these took place along the EU's Southern and Eastern borders—from Libya, the Mediterranean, and Palestine to Ukraine, Moldova, the South Caucasus, and the Western Balkans. The other half were in Africa or Iraq.

This distribution, which has been consistent across all forty-five CSDP missions deployed since 2002, is a testament to the EU's continued focus on its neighborhood and Africa. The commission describes CSDP missions, which are usually relatively limited in scale and ambition, as “tools to promote peace, stability and security in our neighbourhood and beyond, thereby contributing to increased security in the EU.”¹⁴

Overall, the number of missions deployed under the first von der Leyen commission is comparable with that during previous five-year cycles. Between December 2019 and November 2024, the von der Leyen commission was responsible for initiating six new missions and concluding four.

Perhaps the most significant new mission established under HR/VP Borrell was the EU Military Assistance Mission in support of Ukraine, which the union launched in November 2022 to train Ukrainian armed forces as they responded to Russia's invasion. Other new mission mandates included implementing a UN arms embargo on Libya through Operation Irini, observing and reporting on the security situation along the Armenia-Azerbaijan border through the EU Mission in Armenia, providing strategic advice on crisis management and countering hybrid threats to Moldova through the EU Partnership Mission in Moldova, and safeguarding maritime security in the Red Sea through Operation Aspides.

Finally, in 2023, the EU established its Security and Defense Initiative in the Gulf of Guinea to strengthen the capabilities of Benin, Côte d'Ivoire, Ghana, and Togo in response to the growing pressure of terrorist armed groups in their northern regions. This initiative was a reaction to the crisis that unfolded in the Sahel in the early 2020s, with coups in Mali and Niger and high levels of instability in Burkina Faso.

Following these developments, the EU ended its three missions in Mali and Niger.¹⁵ France and the UN also terminated their missions in the Sahel, marking a decisive shrinking of the Western presence in the region. The fourth mission concluded under HR/VP Borrell was Operation Sophia, which the union had designed and launched in the context of the 2015–2016 migration crisis.

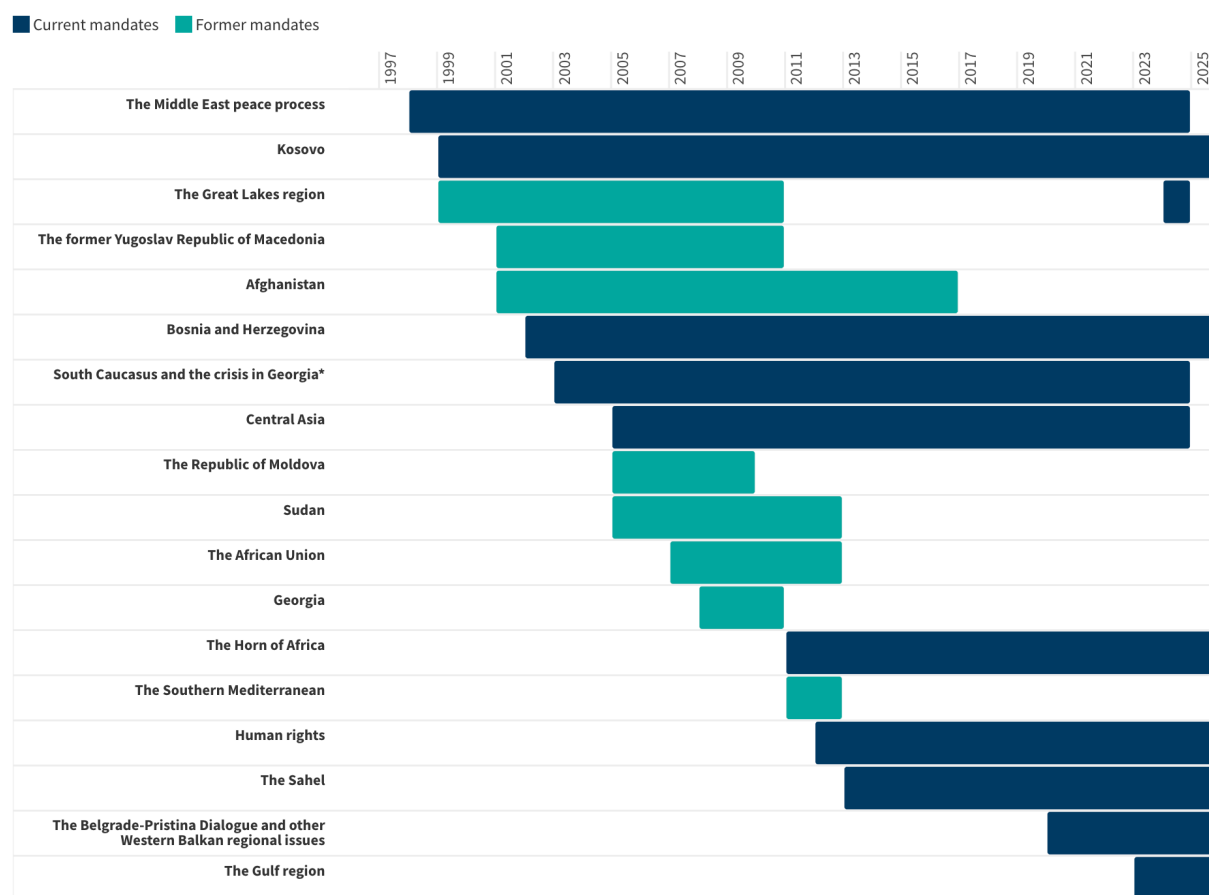
Under Borrell's leadership, the commission also took new initiatives to strengthen its international outreach in security and defense. The Schuman Forum, whose inaugural meeting was held in 2023, was established to foster high-level dialogue on these issues between the EU and its global partners.¹⁶ The forum generated institutional momentum for enhanced cooperation, with a series of concrete actions to be carried out—and assessed—in the years to come.

EU Special Representatives

EU special representatives (EUSRs) are another useful indicator of the union's external priorities. The creation of new EUSR mandates, or the appointment of a special representative under an old mandate, indicates areas in which European leaders feel the need for direct engagement. EUSRs are nominated by the European Council on a proposal from the high representative.

Since 1998, the EU has appointed eighteen special representatives (see figure 3). No EUSRs were nominated under the Juncker commission, probably because of an ongoing debate between the EEAS and the member states about their respective remits. By contrast, the von der Leyen commission has been particularly active in this field, creating three new EUSR mandates: for the Belgrade-Pristina Dialogue and other Western Balkan regional issues, for the Gulf region, and for the Great Lakes region (a mandate that existed previously from 1999 to 2011). In terms of their distribution, which is similar to that of the CSDP missions, these mandates demonstrate a focus on Africa and the EU's neighborhood.

Figure 3. Current and Former EU Special Representatives, 1998–2025



* The previously separate positions of EU special representative for the South Caucasus and for Georgia were merged in 2011.

Source: European External Action Service.

Trade Agreements

The EU is the world's biggest trading power, accounting for an estimated 15.8 percent of global trade in goods and services in 2024.¹⁷ Comparatively, the United States made up 13.6 percent, China 13.4 percent, and the UK 4.2 percent.

For decades, EU trade policy was a matter left mostly in the hands of technocrats in Brussels. But things started to change in the 2010s. Trade policy started to get increasing scrutiny and visibility in 2016, when there were massive protests against the proposed Transatlantic Trade and Investment Partnership with the United States and the EU-Canada Comprehensive Economic and Trade Agreement. During Trump's first mandate, aggressive trade policies were progressively integrated into the U.S. foreign policy toolbox. This posture was a severe challenge to international bodies, such as the World Trade Organization, and to the principle of multilateral trade rules.

Spurred by this trend, EU policymakers continued their work to expand the bloc's trade agreements. At the same time, these accords became a way for the EU to promote the goals of its European Green Deal through reinforced provisions on environmental and labor standards. This approach sometimes worked well, as with the EU–New Zealand trade agreement;¹⁸ in other instances, it led to difficult negotiations, as with the environmental provisions in the EU's deal with Mercosur countries.¹⁹

During the first von der Leyen commission, new trade agreements came into force with Chile and New Zealand—fewer than under previous commissions. Yet, the commission was active in its trade outreach, updating its agreements with Moldova and Ukraine in the context of Russia's invasion and starting trade talks with India, the Philippines, Singapore (for a digital trade agreement), Tajikistan, and Uzbekistan. Finally, the EU's trade negotiations with Mercosur came to fruition in December 2024, when the parties involved reached a political agreement.

Development Assistance

Together, the EU and its member states are the world's largest provider of official development assistance. Under its 2021–2027 multiannual budget, the union has allocated €98.4 billion (\$113.4 billion) to “Neighbourhood and the World.”²⁰ Nominally, this sum represents an increase on the previous budget cycle, in which the funding for external action was set at €94.5 billion (\$108.9 billion).²¹ However, the 2021–2027 budget was adopted at 2018 prices, adjusted with a fixed inflation rate of 2 percent.²² Because this is a lower rate than the real inflation experienced by European consumers and governments, the real value of the EU's development allocation has eroded over the years.

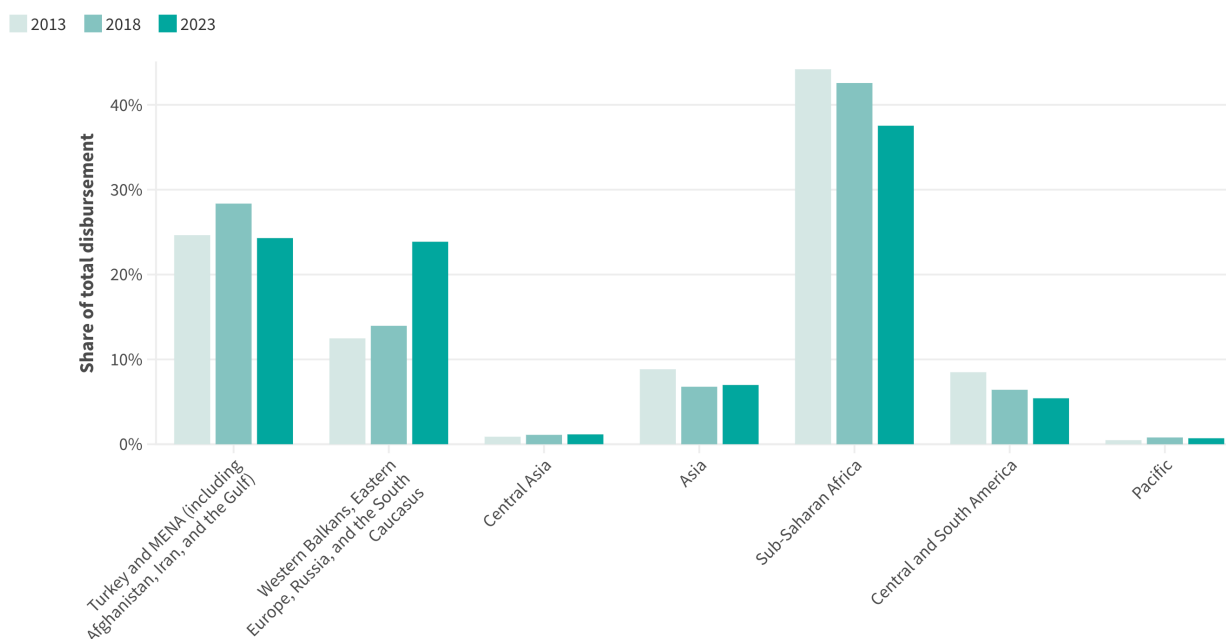
The 2021–2027 budget also streamlined various EU funding mechanisms into the Neighborhood, Development, and International Cooperation Instrument–Global Europe, which is designed to offer more flexible and effective financing of EU external action. Additionally, the budget allocation was complemented by the Global Gateway, the EU strategy launched in 2021 with the aim to mobilize up to €300 billion (\$346 billion) in infrastructure investment worldwide.²³

However, the funds allocated in the current multiannual budget have been inadequate to fully respond to some of the emerging external threats and priorities faced by the union. Since February 2022, the EU institutions and member states have allocated €141 billion (\$163 billion) in financial, humanitarian, and military aid to Ukraine.²⁴ In a similar vein, in preparation for the 2028–2034 budget, whose negotiations started in 2025, European Commissioner for Defense and Space Andrius Kubilius has proposed increasing from €13 billion (\$15 billion) to €100 billion (\$115 billion) the EU's allocation for security and defense.²⁵

Migration is another policy area for which the EU has allotted extraordinary resources in recent years. In 2021, the von der Leyen commission negotiated a €3 billion (\$3.5 billion) extension to its 2016 migration pact with Turkey;²⁶ it also concluded new bilateral agreements with Egypt, Jordan, Mauritania, and Tunisia to reduce irregular migration, each worth between €210 million (\$242 million) and €7.4 billion (\$8.5 billion).²⁷ In June 2024, the new EU Pact on Migration and Asylum entered into force, providing an overarching framework for the union’s cooperation with partner countries to improve border management. For the 2028–2034 budget, the commission has proposed tripling the funding for migration, border management, and internal security.²⁸

This tension between fostering EU networks and objectives globally and prioritizing EU security and strategic autonomy at home also emerges from data on the disbursement of EU development assistance between 2013 and 2023. As in 2013 and 2018, sub-Saharan Africa was the largest recipient of this type of EU aid in 2023, the latest year for which data are available (see figure 4).²⁹ Partnerships to stymie irregular migration to Europe play a role in this statistic, but while African countries accounted for over 40 percent of total EU external aid in 2013 and 2018, their share was reduced to 37 percent in 2023.

Figure 4. EU Development Assistance, 2013–2023



Source: Author’s calculations based on European Commission data. 2013 data: Stefan Lehne and Irini Tseminidou, “Where in the World Is the EU?,” Carnegie Europe, April 28, 2015; 2018 data: “2019 Annual Report on the Implementation of the European Union’s Instruments for Financing External Actions in 2018,” European Commission, 2019; 2023 data: “2024 Annual Report on the Implementation of the European Union’s Instruments for Financing External Actions in 2023,” European Commission, December 19, 2024.

Similarly, the group that represented the second-largest recipient of EU financial assistance—Turkey and MENA countries, including Afghanistan, Iran, and the Gulf states—fell from 28 percent of the total in 2018 to 24 percent in 2023. Aid flows to Asia and Central and South America were also proportionally lower than in previous funding cycles—which can be explained by the EU’s shifting interests and by these countries’ stronger economic performances in 2019–2024.³⁰

These differences were compensated for by an increase in financial assistance to the Western Balkans, Eastern Europe, Russia, and the South Caucasus. In 2023, this group of countries accounted for almost 24 percent of the EU’s total aid, a decisive jump from 12 and 14 percent of the total in 2013 and 2018, respectively.

As for the broader set of countries in the EU’s combined Southern and Eastern neighborhoods, this group received over 40 percent of total EU development aid in 2023. That marked an increase from 32 percent in 2013 and 35 percent in 2018.

EU Delegations

As of December 2024, the EU had 145 delegations around the world, employing 5,822 staffers, including officials from the EEAS and the commission as well as local employees.³¹ These figures are comparable with the numbers of delegations and staffers at the end of the Juncker commission, when the EU had 141 offices abroad and 5,799 staffers.

The size of an EU delegation abroad depends on two factors: the political relevance of the EU’s relationship with a given country, and the level of assistance the union provides to it. This is reflected in the composition of EU staff deployed abroad, approximately one-third of whom are EEAS officials, who handle the general relationship between the EU and the host state. The other two-thirds are commission officials, who mostly work on assistance projects.

Under the first von der Leyen commission, as under Barroso and Juncker, Turkey had the biggest EU delegation abroad—despite the fact that the staff in Ankara shrank by 16 percent from the previous commission term.³² The delegation in Kyiv became the EU’s second largest, with a 15 percent expansion of its staff. Serbia, the United States, and Kosovo completed the top five. The delegation in Belgrade is traditionally one of the EU’s biggest offices abroad, while Kosovo expanded greatly during the Juncker commission, when the Belgrade-Pristina Dialogue was negotiated. The United States became the fourth-largest delegation by virtue of a 22 percent increase in its staff.

In 2019–2024, the number of personnel deployed in countries in the union’s East grew by just 0.7 percent, as staff expansions in Georgia, Moldova, and Ukraine were offset by the downsizing of the Russian mission and the resizing of the delegations to Belarus and Bosnia

and Herzegovina. The EU reduced its personnel deployments to Turkey and the Middle East by 5 percent and significantly scaled back its delegations to Afghanistan and Algeria. Meanwhile, the union doubled the size of its delegations to Kuwait and Libya and set up a new mission in Qatar, signaling once again the EU's increasing attention on the Gulf region. Similarly, a new delegation was opened in Turkmenistan as part of the EU's effort to strengthen links with Central Asia—although the agreement to do so had been signed at the very end of Mogherini's term.

The number of personnel deployed to sub-Saharan Africa, the Americas (excluding the United States), Asia, and the Pacific remained substantially unchanged from the previous commission term. The most significant change was the establishment of the new EU delegation to the UK, which was staffed with forty-eight officials and local employees as of December 2024.

Overall, as was the case five years earlier, the distribution of EU staff abroad in 2024 largely followed that of development aid, with 27 percent deployed in the union's neighboring regions and 35 percent in sub-Saharan Africa.

Where Is the EU Directing Its Attention?

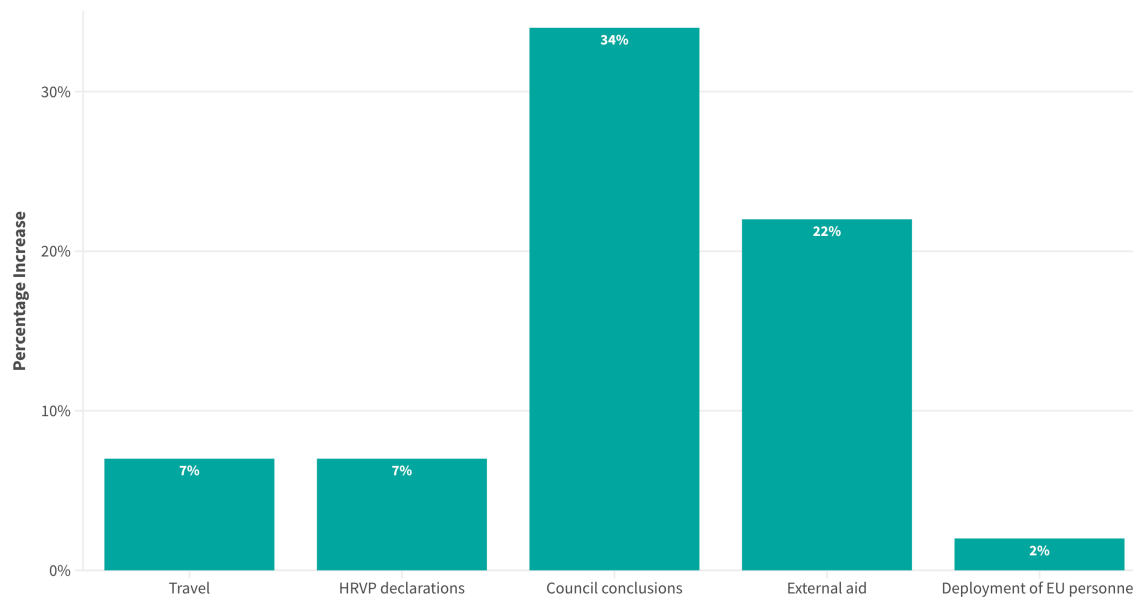
Has the EU become a more or less active global actor under the leadership of von der Leyen? Back in 2019, the incoming commission's mandate had been designed to respond to the geopolitical challenges of the time—to support “the EU's role in the world as a promoter of freedom, democracy, and the rules-based order.”³³ Many of the foreign policy initiatives launched in 2019–2024 responded to this original calling, from the Strategic Compass for Security and Defense to new strategies for space, human rights and democracy, cybersecurity, and artificial intelligence, among others.

But the answer to the original question depends not only on the ambitions of EU leaders but also on the international circumstances that unfolded during their mandates.

An Increased Focus on Neighboring Countries

Across the board, the EU's focus in 2019–2024 shifted to countries in its neighborhood.³⁴ During the first von der Leyen commission, leaders traveled more, talked more, provided more aid, and deployed more personnel to neighboring countries than in the two previous commission cycles (see figure 5).

Figure 5. Increase in the EU's Activity in Its Neighborhood Between 2010–2019 and 2019–2024



Note: Calculated as the percentage change in the EU's levels of activity in neighboring countries, based on the averages during the two previous commission cycles.

Source: Author's calculations based on European Commission, European Council, and European External Action Service data.

The reasons for this trend are in part self-explanatory: Rekindling relations with the UK, dealing with Russia's invasion of Ukraine and the destruction of Gaza, and continuing to curb irregular migration were all top priorities for the first von der Leyen commission. This contributed to bringing the EU's foreign policy focus closer to the union's borders.

But there had been no shortage of crises in the EU's neighbors under previous commissions. One of the reasons why the union directed a disproportionate amount of attention to its neighbors in 2019–2024 is that EU leaders perceived the threat posed by Russia as existential.

A Shift in Emphasis Toward Europe's East

In the context of this refocusing, countries in Europe's East absorbed the largest part of the EU's foreign policy bandwidth. Beyond Ukraine, EU leaders also paid more attention to Moldova, which was put on a path toward EU accession. Georgia had been on a similar trajectory until its ruling party set the country on a course that diverged from the EU. Armenia, Azerbaijan, and Belarus captured the EU's attention at times, such as Minsk's falsified 2020 presidential election or the recrudescence of conflict in Nagorno-Karabakh in 2020 and 2023. Countries in the Western Balkans—a region where EU enlargement picked up some momentum in the wake of Russia's invasion of Ukraine—received more leadership visits and declarations, aid, and EU personnel than in previous commission cycles (see table 2).

Table 2. Changes in the EU's Global Activity Between 2010–2019 and 2019–2024

Region	Travel	HRVP Declarations	Council Conclusions	External Aid	Deployment of EU Personnel
Türkiye and MENA	-19%	-35%	-26%	-8%	-1%
Eastern Europe and Russia	16%	109%	124%	81%	-1%
Non-EU Western Europe	131%	102%	-9%	N/A	130%
Central Asia	-19%	-26%	-30%	17%	7%
Asia	-33%	-8%	-39%	-11%	0%
Sub-Saharan Africa	83%	-1%	-36%	-13%	-2%
United States	-19%	0%	171%	N/A	19%
Americas	-6%	1%	22%	-27%	-3%
Pacific	-100%	-100%	-100%	11%	0%

Note: Calculated as the percentage changes in the EU's levels of global activity, based on the averages during the two previous commission cycles. Türkiye and MENA includes Afghanistan, Iran, and the Gulf states. Eastern Europe and Russia includes the Western Balkans and the South Caucasus. Americas includes Central America, South America, and Canada.

Source: Author's calculations based on European Commission, European Council, and European External Action Service data.

Additionally, since 2022, most EU sanctions have been directed at individuals and entities in Russia. Meanwhile, three of the six CSDP missions initiated under Borrell have been deployed in Europe's East—in Armenia, Moldova, and Ukraine—in addition to Operation Irini, whose objectives include preventing Russian military equipment from reaching Libya.³⁵ Trade negotiators have been busy upgrading trade agreements with Moldova and Ukraine.

Russia's full-scale invasion of Ukraine is the link between these converging trends. The foreign policy of the first von der Leyen commission can be divided into before and after February 24, 2022. From that moment onward, responding to Moscow's aggression became the priority for EU leaders—both to support Kyiv and to counter Russia's influence and interference operations in the wider region.

Beyond this surge of attention to Europe's East, three more trends deserve a mention. First, the von der Leyen commission spent a considerable amount of time dealing with a new neighbor: the UK. Relations with London have taken years of negotiations to be stabilized, diverting the EU's attention away from other global issues.

Second, connections with Gulf and Central Asian countries point to a changing emphasis and an expanded scope in the way the EU looks at key regions just beyond its immediate neighborhood. EU leaders have assigned a special representative to the Gulf, traveled more frequently to the region, and deepened trade talks.³⁶ Central Asia, which receives a larger share of EU aid than in the past, has become more important because of its strategic location as a transportation corridor in the context of the Global Gateway strategy. During von der Leyen's first commission, trade negotiations were initiated with Tajikistan and Uzbekistan, and an EU delegation was opened in Turkmenistan.

Third, countries in Europe's South and the Middle East have seen a drop in the level of attention they receive from EU leaders. While Israel, Libya, and Palestine were widely discussed during Borrell's mandate, exchanges with regional heavyweights such as Egypt and Turkey were significantly reduced. These countries remain important partners in the EU's continued efforts to reduce the number of migrant arrivals in Europe. But the marked reduction in irregular migration since the 2015–2016 peak, the end of the conflict with the so-called Islamic State, and the region's progressive slide toward authoritarian systems of governance have led to less engagement with the EU than in previous years.

An Uneven Global Footprint

Have the EU's relations with the rest of the world been affected by this regional bias? Analysis of the indicators considered for this study confirms that the union is still a global player when it comes to its use of external policy instruments, such as sanctions, trade, and foreign assistance. But EU engagement with the rest of the world was reduced in 2019–2024 in uneven ways, depending on the regions concerned.

Except for Central Asia and the Pacific, the union's external aid decreased everywhere. All indicators show diminished engagement with Asia, but the relaunch of trade talks with India, the Philippines, and Singapore marked significant progress in advancing EU interests in the region. EU-China relations remained frosty in 2019–2024, with von der Leyen repeatedly calling for a “de-risking” of the relationship with Beijing since 2023.³⁷

Similarly, the data show that the EU engaged with countries in the Americas less under the first von der Leyen commission than in the past, even though the bloc reached trade agreements with Chile and Mercosur countries—as well as with the United States, although in a much less concerted way.

Finally, there was a decrease in the EU's interest in African affairs, despite the fact that EU leaders traveled to sub-Saharan Africa more often than in the past and that the EU-Africa partnership was relaunched in 2022. Managing migration remains the centerpiece of EU-Africa relations, with the two blocs torn between the EU's drive to restrict access and externalize border controls, on the one hand, and the European labor market's increasing need for more workers, on the other.³⁸ In this context, the crisis that started unfolding in the Sahel in the early 2020s and led to the end of the three CSDP missions there in 2024 is a marker of the EU's diminished influence in the region.

Conclusion

The comparison between the second Barroso commission, the Juncker commission, and the first von der Leyen commission reveals that in 2019–2024, the EU sustained its level of engagement with the rest of the world but with a more inward-looking, neighborhood-focused approach. Is this shift an irony for a commission that had the ambition to elevate the EU's role as a geopolitical player?

Yes and no. It is ironic because it shows just how the new priorities stemming from the crises in 2019–2024 have overwhelmed the EU's global agenda and reduced the scope of its external relations. Not coincidentally, the union's global partners have repeatedly accused it of losing the plot on all the main international crises it has faced recently. The EU's response to the COVID-19 pandemic was criticized for its lack of solidarity with the so-called Global South.³⁹ The union's almost exclusive focus on Ukraine has been criticized for ignoring other conflicts around the world,⁴⁰ while many have condemned the union's moral double standards on the conflict in Gaza.⁴¹

Yet, there is logic to the way the commission tells the story. The commission's 2024–2029 guidelines articulate the vision of a union that is strategically sovereign, socially fair, and environmentally resilient.⁴² The landmark reports by former Italian prime minister Enrico Letta, former European Central Bank president Mario Draghi, and former Finnish president Sauli Niinistö provide a road map to EU reform that starts at home: To become a true global actor, the bloc will have to reduce its external dependencies, enhance its competitiveness, and develop stronger and more effective capabilities to confront its enemies—especially along its borders.

The crucial question then becomes whether EU policymakers are striking the right balance between this inward focus and a sustained engagement with the rest of the world. If they are not, the union will continue sliding toward retrenchment. Going forward, a few of the trends highlighted in this paper will determine the direction of EU policy as the union hovers between these two poles.

First, the EU will need to keep building cooperative relations with like-minded countries. With Brexit, the EU lost one of its most outward-looking member states. It then spent a considerable amount of energy and resources to reimagine its relationship with London. As Trump's second mandate unfolds, ties with like-minded partners will be key to advance EU interests in an increasingly split international environment.

Second, EU policymakers will need to learn how to manage the fragmentation of their political systems. While the EU has displayed remarkable unity on Ukraine, having passed nineteen sanctions packages against Russia at the time of writing, member states are divided on most other issues. Their representatives met less often under the first von der Leyen commission than in past commission cycles, and they have reached fewer common positions. This fragmentation is part of a general trend toward a more national approach to foreign policy. In this context, the rising influence of radical-right forces on EU foreign policy will remain an exacerbating factor.⁴³

Third, EU leaders will need to put their money where their mouth is. The means to advance toward global leadership will be provided by the 2028–2034 multiannual budget, but the debates on this financial instrument have so far centered on its composition and flexibility rather than on whether its size and funding tools are suited to sustaining the EU's international ambitions. Negotiations on the multiannual budget will be a crucial trend to watch going forward. In the same breath, the anticipated downsizing and reshuffling of the EU's foreign service will provide further insights into the EU's global ambitions.⁴⁴

Fourth, the EU will need to preserve and expand its functional engagement tools with international partners on policy issues, such as sanctions, civilian and military operations, trade, development assistance, and infrastructure investment. But it will also need to find new ways to assert global leadership on multilateral issues, such as digital governance, climate change, and, more broadly, the preservation of a stable and lawful international order.

To do so, European policymakers have a long way to go. Despite all the rhetoric, the EU is still struggling to build a truly strategic culture and mindset. When confronted with crises, the union has shrunk to its traditional, inward-looking nature rather than broadening its horizons. A victim of its own divisions and inefficiencies, the EU will have to reinvent itself once again to chase its ambition of a global Europe.⁴⁵

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