EXPERT COMMENT

The EU in 2020: from politics to geopolitics and back

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In 2014, Jean-Claude Juncker imagined a "political Commission", which was based on the idea that, to move forward, the European Union had to embrace partisan conflict rather than avoid it. His non-technocratic project relied on a clear-sighted analysis of political forces in Brussels. When he was appointed, the European Parliament was dominated by two large families: the centre-right European People's Party (EPP) and the centre-left European Alliance of Socialists & Democrats (S&D). Between them, these two families enjoyed an absolute majority, both in Parliament and in the Council, where governments were either conservative (the UK, Spain) or socialist (France, Italy), or a coalition of both (Germany, Netherlands).

Imposing the *Spitzenkandidaten* principle during the 2014 election campaign allowed these political families to crown Juncker. In exchange, Juncker proposed a "Social-Christian" program, a balance between the moderate Right and the moderate Left. With hindsight, this Brussels-style *Grosse Koalition* (Grand Coalition) worked pretty well. Conservatives and social democrats divided up the posts and made programmatic compromises that allowed the EU to pass bold legislation and steer 5 years of economic growth. The collective response to the refugee crisis was a failure, but, in part thanks to a well-managed Brexit (from

Brussels' perspective), the EU was more popular and more robust in 2019 than it was in 2014.

Could the "political Europe" project be reproduced after Juncker's departure? The 2019 European elections did not yield a political landscape as clear as it was in 2014. Conservative and social-democratic leaders still lead most member states, but in Parliament, the EPP and S&D no longer have a majority, even with the support of Renew, the liberal group. Euroskeptic MEPs are contained, but the Greens, whose numbers have jumped, are not used to compromising with traditional parties. This fragmented Parliament did not succeed in forcing *Spitzenkandidaten* on member-state leaders, who appointed Ursula von der Leyen, who was not a *Spitzenkandidatin*, on a more or less improvised basis.

After Ursula von der Leyen came within a hair's breadth of seeing her candidacy rejected by Parliament urging the confirmation process in July, most observers doubted her ability to pass legislation during the mandate. Was the idea of a "political Europe" dead? Turning to international relations instead, von der Leyen proposed a "geopolitical Commission" focused on forging a role for Europe in the world. She also launched a "European Green Deal," an ecological transition project aimed at attracting the support of greens and centrists.

In short, she did the best she could with a challenging political configuration. But at the beginning of 2020, there was a real danger of stalemate. As the EU entered into its crucial Multiannual Financial Framework (MFF) negotiations, which determine the size and the structure of the budget, Emmanuel Macron's weakened France seemed unable to push its innovative ideas through. In theory, the UK's departure could have facilitated decision-making but Angela Merkel's coalition government had become a brake on almost everything, which allowed the New Hanseatic League to veto progress in eurozone governance. Four of the League's countries - the Netherlands, Sweden, Austria and Denmark – even fashioned themselves as "frugals" who poured cold water on any European ambition. All of this sharped the economic, political and ideological conflict between East and West, and between North and South.

Faced with Donald Trump's United States, an assertive China and a troublesome Russia, the idea of going global

and green made sense. It was a way to diminish internal tensions and unify the EU vis-à-vis the rest of the world. Yet, even to do geopolitics and to combat climate change, internal political conditions must be met. With regards to climate change or international trade, the Commission has real competences. But Brussels suffers from growing isolation in a world in which multilateral cooperation has become difficult. As for health, foreign, or defense policy, the treaties give the Commission few resources; it is, at best, the agent of the Council's desire for cooperation. So there was a risk of grand geopolitical and green talk followed by little action.

Before March 2020, it therefore seemed as though the EU was going to muddle through, the political scientist's usual prediction. The COVID-19 pandemic changed all that. It mixed policy, politics and geopolitics together in a cocktail that, so far, has given a real boost to the EU.

Faced with the worst economic recession since the Second World War, a collapsing Schengen regime, populism, and rising China-US tensions, the EU could have engaged in bickering and paralysis rather than the solidarity and swift decisions needed. That is when Angela Merkel made a momentous decision. On May 18, she withdrew her implicit support for conservative forces in Europe. With Emmanuel Macron, she proposed a €500 billion recovery fund including European borrowing, substantial transfers to COVID-19-afflicted member states, and new revenues for the EU. A few days later, Ursula von der Leyen upped the ante with the € 750 billion Next Generation EU recovery plan – a substantial jump in the EU budget, with subsidies and loans funded by European bonds. We don't know the outcome of MFF negotiations yet, but the volte-face on the part of Germany enlists Eastern and Southern countries and marginalizes the frugal four. It may not lead to federalism, but, thanks to the crisis, the age-old European project of fiscal union and risk sharing may be about to become a reality. Political, that would be a game-changer.

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