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The European Union's Evolving Geopolitical Priorities: Key Takeaways from the State of the Union address

Huseyn Sultanli

 Mirza İbrahimov 8, Baku, AZ1005, Azerbaijan

 (+994 12) 596-82-39, (+994 12) 596-82-41

 E-mail: www.aircenter.az, info@aircenter.az

SEPTEMBER 2026

The European Union's Evolving Geopolitical Priorities: Key Takeaways from the State of the Union address

- This analysis evaluates some of the key points raised during European Commission President Ursula von der Leyen's annual State of the Union address, assessing their implications for the European Union's geopolitical and foreign policy orientation.
- The piece argues that through a clear omission of the United States and the transatlantic relationship during the speech, the Commission President signalled the EU's preparedness to operate 'on the outside' of the transatlantic alliance with greater assertiveness and independence.
- The speech outlined several new proposals aimed at strengthening the EU's capacity to act autonomously in the sphere of security, such as a closer partnership with Canada and the establishment of a European Security Council. However, the likelihood of their implementation is significantly limited by ongoing divisions within the bloc which are yet to be addressed.
- By emphasizing the importance of diversifying the EU's international relationships, Brussels appears to be sending a clear message to several of its existing partners. This includes countries of the South Caucasus and Central Asia, two regions directly mentioned in the speech.
- The analysis also evaluates the Commission President's singling out of 'internal divisions' and 'external dependencies' as the EU's two biggest structural weaknesses.

Introduction

Ursula von der Leyen's annual State of the Union address delivered in the European Parliament was an important litmus test of the European Union's current interpretation of the international order and its evolving role within this process. Although the substance of the speech predominantly touched upon internal EU affairs, particularly on the steps needed to enhance the competitiveness of the 'European market', several key proposals voiced during the speech revealed some of the ideas behind the EU political leadership's thinking and foreign policy priorities. Member states may continue to possess major leverage in determining the overall direction of the institution. However, intensifying discussions surrounding the EU's foreign policy structure added even greater expectation to this year's State of the Union address. The central question, however, both in the lead-up to the speech and in the reaction that followed, concerns Brussels' most significant yet most complex partnership: can the European Union propose genuine alternatives which would help

its well-documented desire to ‘decouple’ from the United States and establish strategic autonomy?

The search for new partners

This year’s speech placed specific emphasis on the importance of ‘partnership and cooperation’ in the contemporary international system and the role that the EU’s partners play in helping Europe advance its strategic autonomy and resilience. The most intriguing aspect of the speech is that it does not contain a single mention of the United States, which, despite evident differences, to this day remains the European Union’s most significant partner.¹ However, the European Commission President’s deliberate avoidance of mentioning what is currently an uneasy relationship between Washington and Brussels points to a crucial underlying dynamic. At the political level, which includes both the EU’s political leadership and the leaders of certain individual member states, a decisive shift in rhetoric has been observed. This includes distancing from the centrality of the transatlantic relationship as the core foundation of the EU’s foreign policy, and greater focus on other partners that are ‘like-minded’ and share the EU’s vision of international relations.² In line with this, the primary objective of this year’s address was to present the European Union as an actor that is in active pursuit of deeper ties with its existing partners, with Brussels committing to bold and one could say overly ambitious proposals in the hope of delivering a clear political message. The extent to which these plans, to be described below, will succeed remains in question. However, what is certain is that the political rhetoric employed by Brussels is increasingly designed to distance the European Union from the Washington security umbrella and pursue an independent external relations strategy that strengthens its other influential partnerships.

The Canadian factor

Ursula von der Leyen’s address revealed key underlying dynamics in the transatlantic relationship. First, the European Union no longer refrains from openly admitting the transformation which this vital alliance has undergone. This is an important evolution of Brussels’ official rhetoric. If, in the first period of the second Trump presidency, European actors did their best to maintain balance in their rhetoric and avoid

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https://ec.europa.eu/commission/presscorner/api/files/document/print/ov/speech_26_1868/SPEECH_26_1868_OV.pdf

² *Ibid.*

contentious statements, this is no longer the case. Only recently, it was reported that in a strategy document released in late 2025 by Belgium's Ministry of Foreign Affairs, the United States is no longer labelled as a key partner.³ This is also reflected in the rhetoric of leading European powers, with French President Emmanuel Macron repeatedly distancing himself from the positions adopted by the White House. Hence, the complete absence of any kind of reference to the United States and more broadly the concept of 'transatlanticism' in its traditional form is entirely in line with the direction pursued by European 'heavyweights'. The 2025 State of the Union address, in contrast, does mention the United States and describes the US-EU partnership as the EU's most important 'trading relationship'⁴.

The absence of the United States in the 2026 speech allowed Ursula von der Leyen to introduce, and in some cases elaborate, alternative ideas about the future of the EU's foreign policy. The first such idea concerns relations with the EU's partners which can be categorized as strategically important but are not members of the institution. On this occasion, special emphasis was made on Canada, with the Commission President mentioning, for the first time, the concept of 'associate membership'. The exact details of this idea and how it could be achieved were not introduced, with the announcement actually coming as a major surprise to most in attendance given its absence in the draft which was released the evening prior.⁵ However, the Commission President did emphasize that the objective is to develop a relationship with Canada which is at the highest level possible. In the speech, the proximity of the economic relationship was stressed, with the growth of trade in goods by 75% in less than a decade specifically highlighted.⁶ However, the most significant point raised was that Canada, the European Union but also several other partners and non-members such as Norway and the United Kingdom are 'like-minded' partners which share a similar geopolitical interpretation of the world. This provides crucial ground to develop an 'alliance' which brings the parties closer together on technological issues, the defence industry, critical minerals, economic security, etc. The section on Canada, in an arguably demonstrative way, concluded by the Commission President stating that the sides, which 'share an ocean', also share one set of values and one view of the world. Given the absence of a mention of the

³ <https://www.brusselstimes.com/belgium/2331786/trumps-us-no-longer-a-reliable-ally-for-belgium-leaked-document-suggests>

⁴ https://commission.europa.eu/strategy-and-policy/state-union-addresses/state-union-2025_en

⁵ <https://www.politico.eu/article/ursula-von-der-leyen-blindside-eu-canada-associate-member-pitch/>

⁶ https://ec.europa.eu/commission/presscorner/api/files/document/print/ov/speech_26_1868/SPEECH_26_1868_OV.pdf

United States, it is difficult to interpret this as something other than a message to Washington about the European Union's intentions.

However, it must be noted that the proposals voiced during Ursula von der Leyen's speech remain strictly possibilities. Their realization in practice is complicated by a series of factors, including the absence of a clear regulatory framework in the EU which would allow the 'associate membership' of a partner state. Moreover, although appetite for a closer relationship with the EU among Canadians is considerable and the majority would support some form of 'associate membership', there is considerably less enthusiasm for regulatory alignment with the EU. A recent poll suggests that whereas over 70% would support a deeper political relationship, only 25% would view closer regulatory alignment positively.⁷ Therefore, even if the two sides commit to moving closer politically, the implementation of this in practice will require considerable thought, persuasion and compromise. Moreover, despite issues on the political level, the United States remains Canada's most significant trading partner. Approximately 70% of Canada's goods are exported to the United States, with exports to the EU only accounting for 5-6% despite the existence of the Comprehensive Economic and Trade Agreement (CETA) between the parties.⁸ In fact, despite the agreement having entered into force in 2017, ten EU member states are yet to ratify the agreement.⁹ Disagreements over food safety, environmental standards and concerns from European farmers are at the heart of this deadlock. This shows that political will and forward-looking statements will need to be matched with real progress on points of contention if the sides are to truly upgrade their relationship on the international stage.

Reforming European 'collective security'

The specific emphasis on Canada was one element of a broader description of the European Union's plans in the sphere of international security. The speech underlines that Russian actions in Ukraine remain the biggest threat to European security, with the pursuit of peace still being the driving factor of European integration. In the speech, the Commission President issued a clear warning that Russian actions are spreading beyond Ukraine, with reported incidents in European states, including Leipzig, serving as a call for more decisive mobilization among European partners.¹⁰

⁷ <https://leger360.com/in-the-news-canada-eu-relations/>

⁸ <https://www.bbc.com/news/articles/c4g4r4lxx25o>

⁹ <https://www.euronews.com/2026/09/21/what-is-ceta-and-why-is-the-eu-canada-trade-deal-still-in-limbo>

¹⁰ https://ec.europa.eu/commission/presscorner/api/files/document/print/ov/speech_26_1868/SPEECH_26_1868_OV.pdf

In response to this and the broader geopolitical environment, the speech makes several proposals regarding collective European security. The first such proposal is an EU equivalent to NATO's 'Article 4', which the Commission President labels as Europe's 'Emergency Security Protocol' or the EU's 'Article 4'.¹¹ The logic behind this proposal is for it to run alongside and complement NATO's Article 4, which remains indispensable for international security. However, the existence of an independent European mechanism would grant the EU and the European continent greater decision-making authority when it comes to responding to a range of threats. According to von der Leyen, there is currently an inability to respond swiftly and effectively to actions that pose threats to national and regional security but cannot necessarily be labelled as 'armed aggression'.¹² In practice, the triggering of this mechanism would require all member states, but also the EU's closest partners, to convene and work together on a European response to all possible threat levels.

These security-related points in the speech could also be interpreted as direct signals to the United States. The Trump Administration has consistently, and on valid grounds, criticized European states for their inconsistency in upholding NATO at the heart of the concept of collective security. However, the division between the sides is no longer limited to concrete policy issues. The sides have been repeatedly at odds over major foreign policy issues, including the response to the situations in Iran and Ukraine, but also on issues of direct mutual interest such as Greenland and the bilateral EU-US trade relationship. In many ways, one could argue the firm and non-conciliatory rhetoric of the Trump Administration has forced European states to accept their overdependence on Washington in the sphere of defence and security. Hence, the renewed and more aggressive emphasis on 'European' solutions to 'European problems' is undoubtedly a response to the challenge posed by the United States. The initial step in this process was the increase of spending on defence and security, with 'NATO 3.0' representing a heavier European presence in an alliance increasingly based on 'burden-sharing'. The second and most challenging step is Europe's development of real strategic autonomy, which recent cases such as its handling of the migration crisis in Southern Europe show that it still lacks. However, the speech delivered by von der Leyen may be indicative that there is, finally, genuine recognition of the need to act more decisively on defence and security. The mention of the need for a new 'European Security Strategy', to be drafted by both the European Commission and the European External Action Service, is another indicator of this.¹³ Moreover, the proposal to establish a European Security Council, the exact

¹¹ *Ibid.*

¹² *Ibid.*

¹³ *Ibid.*

details of which are not yet known, is another clear attempt to embolden the EU's rhetoric when it comes to its own security. The extent to which this rhetoric will translate into a real closing of the security gap still facing Europe will determine the practical significance of this latest speech.

Division and dependency – addressing the EU's weaknesses

Another essential aspect at the heart of the speech was the focus on the EU's cohesion and competitiveness as an actor and how this affects its external relations. The principal issue is the EU's next long-term budget for 2028-2032, a proposed €2 trillion long-term financial framework which combines resources for AI, security, defence, agriculture and other crucial areas. For some time, member states have clashed over the proposed figures, with states like Germany, Denmark, Spain, the Netherlands and Austria uniting to push for a budget that is smaller by "several hundred billion euros". In particular, they argue that the proposed budget focuses excessively on subsidies and transfers and not sufficiently on fighting immediate issues such as security and irregular migration.¹⁴

Referring to the budget as "the EU's future", von der Leyen makes it clear that the EU currently has two major limitations – divisions and dependencies. On the first aspect, the Commission President argues that disagreements between member states but also the ineffectiveness of EU-level mechanisms in the most pressing moments, such as in response to the recent migration crisis facing Spain, are something that the EU's rivals regularly take advantage of. The speech argues that considerable progress has been made on developing a regulatory framework for tackling illegal migration. However, the events of the summer demonstrate that they remain ineffective in times of crisis. In response, von der Leyen proposes the establishment of a new regulatory framework which will include early warning systems and cooperation with third countries. However, as with other issues, the EU's ability to push through such reforms is limited by internal divisions that inevitably arise among member states. Combined with unpredictable electoral processes in certain member states, the EU's ability to act decisively in high-pressure situations remains limited. This is and will remain the EU's most significant structural limitation, with member states consistently adopting diverging stances on critical issues.

¹⁴ <https://www.reuters.com/business/five-countries-want-smaller-growth-next-eu-budget-spain-offers-ideas-2026-09-18/>

The second aspect mentioned by von der Leyen is the issue of “dangerous dependencies” and how these affect the EU both economically and geopolitically.¹⁵ The speech argues that to position itself as a more competitive and independent actor, the EU must follow and apply the logic of diversification to the way it develops its relationships. The speech mentions the EU’s significant trade deficit with China, with von der Leyen labelling it as a major structural disadvantage. To combat this, there is a strong emphasis on ensuring that EU member states and their respective economies are attractive to foreign investment, with the speech outlining several initiatives introduced in recent years to ensure that Europe remains “the home of innovation”. The underlying logic driving this statement has clear geopolitical implications. Although briefly and with little detail, the Commission President underlined the importance of the diversification of the EU’s external partnerships. It was mentioned that in 2026 alone, free trade agreements were signed with India, Mercosur, Mexico, Indonesia and Australia, bringing the total number of the EU’s international trade deals to 80.¹⁶ In this light, the speech mentions the importance of further diversifying the EU’s partnerships, with connectivity presented as an opportunity. Here, the Middle Corridor is described as an international connectivity project linking the South Caucasus and Central Asia, with the EU expecting to raise up to €12 billion in public and private investment. Moreover, the speech mentioned that a Regional Connectivity Summit is expected to be organized in cooperation with Bulgaria. This could serve as an opportunity for the EU to concretize its plans for both the South Caucasus and Central Asia, especially against the backdrop of the normalization process between Azerbaijan and Armenia. With Ursula von der Leyen proposing the establishment of a Connectivity Partnership with Azerbaijan during her trip to the country in July 2026 and such a framework already existing with Armenia, the South Caucasus presents Brussels with a unique opportunity to double down on its diversification rhetoric. With the enlargement agenda suffering from uncertainty and member state division, the EU faces little choice but to engage in strategically vital regions through renewed mechanisms.

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https://ec.europa.eu/commission/presscorner/api/files/document/print/ov/speech_26_1868/SPEECH_26_1868_OV.pdf

¹⁶ *Ibid.*

Conclusion

The 2026 State of the Union address stands out from previous editions for one specific reason: it represents an indirect but clear signal by the European Commission of the European Union's rapidly changing priorities on the international stage. By referring to the 'fraying' of 'old assumptions and relationships', and failing to mention the United States or the transatlantic relationship throughout the speech, it appears that Brussels is acting as decisively as ever in its attempt to boost its strategic autonomy even if this comes at the expense of a further cooling of its relationship with Washington.¹⁷ By emphasizing deeper partnerships, collaboration with "like-minded partners" and institutional resilience, the European Commission made a bold and deliberate step towards the reorientation of its foreign policy away from maintaining calm in the transatlantic alliance and towards a more diversified foreign policy portfolio. One could interpret this as a signal for several of its partners, including the countries of the South Caucasus and Central Asia, two regions which were specifically mentioned in the speech. However, the true extent to which practice will reflect the decisiveness in von der Leyen's address will be the ultimate test for the EU's pursuit of a new geopolitical role in international relations. Until then, the two structural weaknesses identified by Commission President von der Leyen, namely divisions and dependencies, will continue to separate the EU from the strategic autonomy it is so actively pursuing.

Author: Huseyn Sultanli, Advisor at the Center for Analysis of International Relations and Multiculturalism (AIR Center)

¹⁷ *Ibid.*