

European Politics Overview

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- [Climate & Energy](#)
- [Country Profiles — Major EU Member States](#)
- [Defence & Security](#)
- [EU Expansion](#)
- [EU Institutions & Governance](#)
- [EU-UK Relations](#)
- [Far-Right & Populist Surge](#)

Climate & Energy

Climate & Energy

Last updated: 25 May 2026

European Green Deal — Implementation Status

The Green Deal remains formally intact but has been depoliticised and partially deprioritised relative to industrial competitiveness and defence.

Delivered:

- European Climate Law (net-zero by 2050, 55% reduction by 2030)
- Fit for 55 package — largely adopted by 2024
- EU ETS Phase 4 operational
- Renewable Energy Directive (RED III) — 42.5% target (aspiration for 45%)
- CBAM in transitional phase
- Deforestation-free products regulation

Stalled/Watered Down:

- Nature Restoration Law — facing significant member state pushback
 - **2035 combustion-engine car ban softened** — changed to a 90% CO2 reduction target with e-fuel/biofuel loopholes
 - The "Industrial Accelerator Act" (originally "Industrial Decarbonisation Accelerator Act") had the word "decarbonisation" dropped from its title by von der Leyen in Sept 2025 amid internal disputes
 - Agricultural emissions — CAP reforms watered down after farmer protests
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Fit for 55 Package

13 legislative proposals covering:

- Tightened EU ETS (more ambitious cap, faster reduction)
- Parallel ETS for buildings and transport (ETS2) — launched 2024, politically contentious
- CBAM — transitional phase active, full implementation from 2026
- 2035 ICE phase-out — amended to 90% CO2 reduction target
- Higher renewables and energy efficiency targets
- Social Climate Fund — to cushion impact of carbon pricing on vulnerable households

CBAM implementation snags:

- Complexity of calculating embedded emissions for imports
 - Administrative burden on importers
 - Developing countries have complained to the WTO
 - Free allowance phase-out alignment with CBAM ramp-up still disputed
 - UK has introduced its own CBAM — alignment/mutual recognition talks ongoing
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EU ETS (Phase 4)

- **Carbon price trajectory:** Fell from peaks of ~€100/t in early 2023 to around €65-75/t through 2024-2025 due to reduced industrial output and faster renewables deployment
 - **Market Stability Reserve** continues absorbing surplus allowances
 - **ETS2 (buildings/transport)** launched in 2024 — has been highly politically contentious, with member states fearing public backlash over heating costs
 - EU's carbon price is still the world's highest, but the gap with other jurisdictions is narrowing
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Renewable Energy Directive (RED III)

- Target: 42.5% renewables share of energy consumption by 2030 (aspiration for 45%)
 - Legally binding since late 2023
 - EU's solar/wind growth pushed fossil-fuel power to its lowest level in 40 years (Jan 2025)
 - Solar capacity additions hit records in 2024-25
 - Wind: offshore wind expansion accelerating but facing permitting bottlenecks and supply chain constraints
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Energy Crisis Fallout (Ukraine War / REPowerEU)

REPowerEU Outcomes

- Russian pipeline gas imports fell from ~40% of EU gas in 2021 to under 8% by 2023
- LNG imports from US and Norway soared
- European renewable capacity additions hit records
- New LNG terminals built at pace in Germany, Netherlands, Greece

Russian Gas via Ukraine Transit

- The 5-year transit deal expired on 31 December 2024
- Hungary and Slovakia continued receiving some Russian gas via TurkStream
- Zelensky refused to renegotiate transit
- As of May 2026, **no Russian gas flows through Ukraine**

LNG Dependency

- EU became the world's largest LNG importer in 2023
- Critics warn of LNG lock-in and stranded assets — long-term contracts lock Europe into fossil fuel infrastructure
- Germany's new LNG terminals are controversial with climate groups

New Iran War (Feb 2026) — Second Energy Crisis

- The US-Israeli attack on Iran triggered a second energy shock
 - Cost the EU an additional €24bn for oil/gas imports
 - Oil spiked over \$100/barrel
 - Commission launched "**AccelerateEU**" (23 April 2026) — 44 actions including:
 - Electrification target
 - Gas storage fill requirements
 - Tax changes favouring electricity over gas
 - Accelerated renewable permitting
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Green Deal Industrial Plan / NZIA / CRMA

Net-Zero Industry Act (NZIA)

- Adopted Spring 2024
- Targets 40% of net-zero tech manufacturing needs met domestically by 2030
- Covers solar, wind, batteries, heat pumps, electrolyzers, grid technologies
- Simplified permitting for strategic projects

Critical Raw Materials Act (CRMA)

- Adopted 2024
- Targets: 10% extraction, 40% processing, 25% recycling of strategic raw materials within EU
- Diversification away from Chinese dominance in rare earths, lithium, cobalt
- Strategic partnerships with resource-rich countries (Chile, Australia, Namibia)

Industrial Accelerator Act (March 2026)

- Proposed "Made in Europe" procurement rules for low-carbon steel, cement, and EV parts
 - Controversial — some environmentalists call it "climate law in disguise", others fear climate focus being sidelined for competitiveness
 - Von der Leyen dropped "decarbonisation" from the title
 - Germany opposed restrictive "made in Europe" rules
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Member State Pushback

Farmer Protests

- Major protests across France, Germany, Netherlands, Poland, Belgium in 2023-24
- Directed against: fertiliser restrictions, CAP reforms, nitrogen rules, pesticide bans
- Commission watered down several agricultural proposals
- The far right successfully channelled this anger — Politico: "Dutch farmers back Wilders as centrist nightmares come true"

Centre-Right Turn

- Germany's CDU won Feb 2025 election — climate ambition downgraded relative to competitiveness
- France's RN expected to do well in 2027 presidential race
- European Parliament shifted right in 2024 elections — Greens lost seats
- AfD/RN climate denialism: AfD platform includes leaving EU climate policy, reopening coal plants

2040 Target Debate

- Commission proposed 90% net reduction by 2040 (July 2025 amendment to Climate Law)
 - Key controversy: includes international carbon credits from 2036, wider use of carbon removals in EU ETS
 - Climate NGOs called it a "watered down" target
 - EU missed the Feb 2025 UN deadline for new NDCs — now faces Sept 2026 deadline
 - Member states (led by Germany, Poland, Italy) pushed for flexibilities
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Heat Pump and EV Market

EV Sales

- EVs outsold petrol cars in EU for the first time in December 2025 (217,898 EVs vs 216,492 petrol, up 51% YoY)
- Full-year 2025: 17.4% market share (up from 13.6% in 2024)
- Chinese EV maker BYD tripled market share to 1.9%
- Tesla's market share dropped 37.9% in 2025 amid Musk controversy
- Automotive sector pushed back hard — Stellantis claimed "no natural demand" for EVs
- EU responded by softening the 2035 ban to a 90% CO2 target with e-fuel loopholes

Heat Pump Slowdown

- Heat pump sales in Europe fell in 2024 after a boom in 2022-2023
 - Partly due to policy uncertainty in Germany and reduced gas/electricity price differential
 - AccelerateEU plan includes tax changes to favour electricity over gas
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Country Profiles — Major EU Member States

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Last updated: 25 May 2026

?? Germany

Chancellor: Friedrich Merz (CDU) **Government:** CDU/CSU-SPD grand coalition (since Feb 2025)

Next election due: 2029 (but coalition could collapse earlier)

State of the nation:

- Economy struggling — tax revenues slashed by ~€70bn for 2026-2030, blamed on Trump's Iran war causing global energy shock
 - Economy has been stagnant for years with high energy costs and weak export demand
 - Major transatlantic tensions: Merz publicly said US was "humiliated" by Iran; Trump responded by cutting 5,000 US troops from Germany
 - Migration policy shifted right under Merz — "asylum turnaround," pushbacks at borders
 - Asylum seeker numbers down
 - Merz proposed "associate EU membership" for Ukraine — Zelenskyy rejected it
 - **Key challenge:** Merz's weak mandate, internal coalition tensions, and an emboldened AfD at ~20%
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?? France

President: Emmanuel Macron (lame duck — serving final year, cannot run again) **Next**

presidential election: April-May 2027

2027 Presidential Race:

- **Édouard Philippe** (ex-PM, Horizons, centre-right) is clear early favourite — only candidate who can beat RN in round two
- **Marine Le Pen** (RN, 57) — still strong but facing potential EU embezzlement trial appeal verdict (7 July 2026), which could bar her from standing
- **Jordan Bardella** (RN, 30) — will stand if Le Pen is barred
- **Jean-Luc Mélenchon** (LFI, 70) — declared candidacy. Platform: dismantle billionaire media empires, heavy taxes on business, opt-out from EU rules
- **Gabriel Attal** (Renaissance) — declared on Friday (date TBC)
- **Bruno Retailleau** (Republicans) — centre-right risks splitting the vote
- Macron has said he won't step down early

State of the nation:

- RN remains the dominant opposition force (polling ~30%+ in European elections)
 - Fiscal situation stretched — high debt-to-GDP ratio, pension reform still contested
 - Economy performing better than Germany but below expectations
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?? Italy

Prime Minister: Giorgia Meloni (Fratelli d'Italia) **Government:** FdI-Forza Italia-Lega coalition **Next general election:** 2027

State of the nation:

- Meloni lost the **constitutional referendum on 23 March 2026** — 54% No vs 46% Yes (turnout ~60%)
 - The reform would have separated judges and prosecutors; opponents said it threatened separation of powers
 - First significant electoral defeat for Meloni's government
 - Local elections (May 2026) showed coalition still performing well
 - Economy stagnant — Trump's Iran war hitting energy costs hard
 - EU relations: Meloni a close Trump ally domestically unpopular
 - Press freedom concerns remain (Politico: "A dangerous new phase")
 - Next general election due 2027
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?? Spain

Prime Minister: Pedro Sánchez (PSOE) **Government:** PSOE-Sumar coalition, dependent on Catalan separatist and Basque parties **Next election:** TBC (currently serving full term to 2027)

State of the nation:

- Sánchez still in power but embattled since corruption scandal involving wife Begoña Gómez (Apr 2024)
 - Catalan amnesty law passed May 2024 — controversial, approved by slim majority
 - Coalition with Sumar is fragile — depends on Junts, ERC (Catalan separatists) and Bildu, PNV (Basque)
 - Economy performing relatively well — "envy of Europe" per BBC (tourism boom, strong services sector)
 - Sánchez took strong anti-Trump line on Iran war trade threats
 - **April 2026:** Spain moves to grant legal status to 500,000 unauthorised immigrants — direct challenge to Vox
 - Far-right Vox remains significant opposition at ~12-14%
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?? Netherlands

Prime Minister: Rob Jetten (D66) — from 23 Feb 2026 **Government:** Minority coalition — D66 + VVD + CDA

State of the nation:

- **Dramatic political shift in 2026:** Schoof cabinet (with PVV support) collapsed Feb 2026 after PVV withdrew June 2025 and NSC withdrew Aug 2025
 - New election Oct 2025: D66's Rob Jetten (38) narrowly beat Wilders
 - Jetten became Netherlands' youngest ever and first openly gay PM
 - Wilders (PVV) now in opposition, vowing to oppose everything
 - Minority coalition means every reform must be negotiated vote-by-vote
 - Key policies: migration/asylum reform, €19bn extra defence spending, healthcare/benefits cuts
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?? Poland

Prime Minister: Donald Tusk (Civic Coalition) **Government:** KO-Third Way-Left coalition
President: Karol Nawrocki (PiS-aligned, from 2025)

State of the nation:

- Tusk's pro-EU coalition government in power since late 2023
- EU funds unblocked after rule-of-law restoration efforts (€137bn)
- Rule of law restoration ongoing — reversing PiS judicial reforms
- **President Nawrocki (PiS-aligned) elected 2025** — gives PiS veto power and ability to block legislation
- PiS remains largest single party (~33-35%)

- **Recent blow:** Politico (25 May 2026): "Poland's right wing topples Kraków's liberal mayor in fresh blow to Tusk" — local election setbacks
 - Tusk pushing military training for all men; accusing Russia of sabotage
 - Former PiS justice minister Ziobro a fugitive in US facing 26 charges
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?? Sweden

Prime Minister: Ulf Kristersson (Moderates) **Government:** M-KD-L coalition with confidence-and-supply from Sweden Democrats **Next election:** 13 September 2026

State of the nation:

- Kristersson in power since Oct 2022 via Tidö Agreement with SD
 - Most restrictive migration policy in Swedish history enacted under SD influence
 - Government still in office — polls suggest tight election ahead
 - Sweden backed Ukraine's NATO path
 - A September 2026 election will test whether SD can break into formal government
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?? Austria

Chancellor: Karl Nehammer (ÖVP) — caretaker **Incoming:** Likely Herbert Kickl (FPÖ)
Government situation: FPÖ won Sept 2024 election (~28.8%, first place). ÖVP initially refused coalition but now signalling willingness. **FPÖ-ÖVP coalition most likely outcome.**

State of the nation:

- If Kickl becomes Chancellor, he would be Austria's first far-right leader since WWII
 - Politico: "In Austria's Kickl, the EU has its next Orbán"
 - Kickl uses term "Volkskanzler" (Nazi connotations) and calls for "remigration"
 - EU nervously watching — Kickl would significantly alter the Council's political balance
 - Joined PfE grouping in European Parliament
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?? Belgium

Prime Minister: Bart De Wever (N-VA) **Government:** Right-wing coalition with Flemish separatists **Formation history:** June 2024 election — 7+ months of negotiations. De Wever became PM on 31 Jan 2025. Longest formation crisis in Belgian history finally resolved.

State of the nation:

- N-VA (Flemish nationalist) largest party after June 2024 election, surprisingly beating Vlaams Belang
 - Government is right-wing coalition with Flemish separatist at helm
 - Ongoing tensions with French-speaking parties
 - Belgium's complex federal structure continues to make governance difficult
 - De Wever: the man who previously wanted to destroy Belgium now running it (Politico)
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Defence & Security

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EU Defence Integration

PESCO / European Defence Fund / EDIRPA

- **PESCO (Permanent Structured Cooperation):** 68 projects running, covering military training, cyber, maritime security, and medical support. Member states committed to increasing defence budgets, but compliance remains uneven.
- **European Defence Fund (EDF):** €8 billion for 2021-2027 — funding joint R&D for defence capabilities. Next MFF expected to substantially increase this.
- **EDIRPA (European Defence Industry Reinforcement through Common Procurement Act):** Operational since 2023 — incentivises joint procurement, addresses the fragmentation of European defence procurement.
- **EU military mobility:** Von der Leyen headed to Lithuania for "drone crisis talks" (May 2026), emphasising the military mobility/airspace security nexus.

Strategic Compass

- The EU's Strategic Compass (adopted March 2022) continues implementation
 - Pushes the bloc to define itself as a credible security actor independent of the US
 - Rapid Deployment Capacity (up to 5,000 troops) not yet fully operational — member states have been slow to commit forces
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EU-NATO Cooperation

Trump/Iran War Context

The US-Iran war (Feb 2026) has fundamentally reshaped the transatlantic dynamic:

- **"Europe races to make it harder for Trump to rattle NATO"** (Politico) — European leaders actively building structures that limit US leverage over NATO
- Trump's chaotic decision-making on troop deployments — first refusing to commit troops to Poland, then U-turning to pledge an additional 5,000 troops
- US cut troop levels in Germany by 5,000 amid Trump's personal spat with Merz
- Rubio tried to reassure allies but acknowledged Trump's "disappointment" with NATO would be discussed at the Ankara summit

Joint Declaration

- The 2023 and 2024 EU-NATO Joint Declarations remain the framework for cooperation
 - Focus areas: military mobility, cyber defence, hybrid threats, resilience of critical infrastructure
 - The Trump/Iran war has accelerated cooperation — EU sees NATO as vulnerable to US domestic politics
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Ukraine War (May 2026)

Current Situation (Day 1,552)

- Russia launched an Oreshnik hypersonic ballistic missile strike on Kyiv on 24 May 2026 — described as a "deranged attack" and "reckless nuclear brinkmanship"
- Russia threatens more Kyiv strikes and told foreign nationals to leave
- A Luhansk strike sparked Russian accusations and vows to retaliate
- Russia testing NATO's eastern flank via drone incursions into Polish/Romanian airspace
- Frontlines have shifted little in 2025-26 — a war of attrition dominated by drone warfare, artillery duels, and missile strikes on infrastructure

EU Military Aid

- **European Peace Facility (EPF):** Topped up multiple times. Total has exceeded €12 billion in military support for Ukraine
- **Ammunition plan:** The "one million shells" initiative fell short — only ~500,000 delivered by early 2025. EU is now pursuing longer-term production contracts
- **Training mission (EUMAM Ukraine):** Has trained over 60,000 Ukrainian soldiers
- Lithuania calling for frozen Russian assets to be used for Ukraine funding

Ukraine's NATO Membership

- Sweden publicly backed Ukraine's path to NATO

- Rutte confirmed Zelenskyy would attend the NATO summit in Ankara
- The Ankara summit is seen as a pivotal moment for Ukraine's membership pathway
- No consensus yet — US, Germany, and Hungary (pre-Orbán) reluctant; UK, Poland, Baltic states pushing hard

European Troop Deployments

- Discussions ongoing about European troop deployments for post-war security guarantees
 - UK troops already deployed in Estonia as part of NATO's enhanced Forward Presence
 - France has floated the idea of a "European military mission" to Ukraine
 - No formal decision taken — highly sensitive given risk of direct escalation with Russia
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National Defence Spending

Across Europe, defence spending has surged:

- **NATO target of 2% GDP** is now met by 23 of 32 members (up from 8 in 2022)
 - Several countries pushing toward 2.5% or 3% (Poland on track for 4%)
 - **Germany:** €100bn special fund for the Bundeswehr has yielded mixed results — bureaucratic inertia despite increased spending. BBC reported US troop withdrawal from Germany seen as "foreseeable"
 - **UK:** Defence spending at 2.3% GDP — Labour committed to maintaining this. UK-EU security pact being negotiated (see EU-UK Relations)
 - **France:** Macron declared Europe's freedom faces its greatest threat since WW2
 - **Poland:** Pushing 4% GDP — Europe's highest proportional spender, massive modernisation programme
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European Defence Industry

Joint Procurement

- EDIRPA driving collaborative procurement (ammunition, air defence, drones)
- European allies rushing to bolster Cyprus defences after drones targeted a British base
- EU trying to reduce dependency on US defence equipment

German Zeitenwende

- The €100bn special fund and policy shift announced by Scholz in Feb 2022

- Results mixed: procurement still slow, bureaucracy slow to adapt
- Germany committing to long-term contracts for ammunition, Eurofighter, naval vessels
- But US troop withdrawal and Merz's difficult coalition have created uncertainty

French Push for Strategic Autonomy

- France continues pushing for European strategic autonomy from the US
 - 2027 presidential race (Philippe favourite) will determine direction
 - Macron has long argued Europe cannot rely on the US for its security
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UK-EU Defence Pact (May 2026)

The flagship deliverable of Starmer's EU reset:

- Labour's David Lammy promised a new UK-EU security pact
 - Covers military mobility, joint procurement, intelligence sharing, and cyber defence
 - Kaja Kallas stated "fishing shouldn't block a defence pact" — indicating the political will to separate defence negotiations from broader TCA disputes
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EU Expansion

EU Expansion

Last updated: 25 May 2026

Overview

The Ukraine war has fundamentally accelerated EU enlargement — unprecedented speed from application (Feb 2022) to candidate negotiations (June 2024) for Ukraine and Moldova. But the process remains uneven, with the Western Balkans stalled in decade-long negotiations and Georgia frozen. Orbán's fall (Apr 2026) is the most significant political development for enlargement — removing the single biggest obstacle.

Ukraine — Accession Status: Candidate Negotiating

- **Applied:** 28 Feb 2022 (4 days after Russian invasion)
- **Candidate status granted:** 23 June 2022
- **Negotiations opened:** 25 June 2024 (simultaneously with Moldova)
- **Bilateral screening completed:** 30 Sept 2025
- **Chapters opened:** 0 of 33

What's blocked:

- **Hungary** under Orbán blocked opening of negotiations clusters through 2025 — argued integrating "a country at war"
- Orbán's fall (Apr 2026) is the breakthrough: **Kyiv and Budapest launched talks on Hungarian minority rights** (18 May 2026) — positive signal for unblocking
- **Slovakia (Fico)** threatened to withdraw support over Druzhba oil pipeline dispute
- **Germany (Merz)** cast doubt on Ukraine joining by 2034 (Jan 2026 statement)
- EU Ambassador Katarína Mathernová stated (22 May 2026) that Orbán's fall created "fresh momentum" — but that "others were hiding behind him" and are now exposed

Informal progress:

- Ukraine received **Draft Common Positions on clusters 1, 2, and 6** on 11 Dec 2025 — first time an official negotiating position was revealed to a candidate pre-opening
 - Ukraine has pushed for phased integration into the Single Market before full membership
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Moldova — Accession Status: Candidate Negotiating

- **Applied:** 3 March 2022
- **Candidate status granted:** 23 June 2022
- **Negotiations opened:** 25 June 2024
- **Screening completed:** 22 Sept 2025
- **Chapters opened:** 0 of 33

Key developments:

- Target date of **2028** for EU accession — the most ambitious timeline of any candidate
 - Oct 2024 constitutional referendum: narrowly voted to amend constitution to include EU membership aim
 - Pro-European PAS party retained power in Sept 2025 parliamentary elections
 - Receiving €1.9 billion Growth Plan (2025-2027)
 - **Informal opening of all chapters began 17 March 2026** — to bypass Hungary's veto (before Orbán's fall)
 - **Challenge:** European Commission expressed concern over dismissal of National Bank governor Octavian Armaşu as a risk to governance
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Georgia — Status: Frozen

Status: Candidate status granted Dec 2023, but **accession process is effectively frozen / suspended**

Key events:

- "Foreign agents" law (passed by Georgian Dream 2024) — requiring NGOs and media to register as receiving foreign funding
- EU **de facto halted** Georgia's accession process on 9 July 2024
- EU halted all financial aid to the Georgian government (redirected to civil society) from 27 June 2024
- 2024 parliamentary elections disputed — European Parliament rejected results, called for re-run

- **28 Nov 2024:** PM Kobakhidze announced Georgia **suspended EU accession negotiations until end of 2028**
 - Massive protests followed. Constitutional crisis: disputed presidential inauguration
 - **No screening has taken place. No chapters opened or closed.**
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Western Balkans

Montenegro — Most Advanced Candidate

- **Chapters opened:** 33/33 (100%) ☒
- **Chapters provisionally closed:** 14/33 (42.4%)
- **Earliest possible entry:** 2028
- **Key development (22 Apr 2026):** EU ambassadors approved creation of ad hoc working group for drafting Montenegro's accession treaty — a major milestone
- Commissioner Marta Kos stated Montenegro could complete negotiations by 2028
- 19 chapters remain to be closed
- Only candidate to have met interim benchmarks for Chapters 23 & 24 (judiciary, fundamental rights)
- Public support for EU membership: ~81%

Serbia — Negotiating Since 2014

- **Chapters opened:** 22/34 (64.7%)
- **Chapters closed:** 2/34 (5.9%)
- **Earliest possible entry:** 2029-2030
- **No progress since December 2021** — negotiations stalled
- **Main blocks:** Kosovo recognition, democratic backsliding, failure to align with EU sanctions on Russia, media freedom
- Benchmarks met for opening 3 more chapters (10, 16, 19) in Dec 2024 but **postponed** due to conditionality
- **21 May 2026:** Serbia's parliament head Ana Brnabić accused EU of "double standards" — arguing Ukraine was fast-tracked while Serbia's decade-old talks stall

Albania — Negotiating Since July 2022

- **Chapters opened:** 0/33 (screening completed Nov 2023)
- First chapters opened in Oct 2024
- Commissioner Kos suggested 2029 as possible accession date
- Main challenge: rule of law, organised crime, corruption

North Macedonia — Negotiating Since July 2022

- **Chapters opened:** 0/33 (screening completed Dec 2023)
- **Key block:** Opening of Fundamentals cluster conditional on constitutional amendment recognising **Bulgarian minority** — Bulgarian veto
- No progress on this amendment as of May 2026
- Name dispute (with Greece) resolved 2018-19 but bilateral issues continue to block

Bosnia and Herzegovina — Candidate (Not Yet Negotiating)

- Candidate status granted Dec 2022
- March 2024: European Council granted **conditional approval** for opening negotiations
- But negotiations framework **has NOT been adopted**
- **Blocks:** Republika Srpska (Milorad Dodik) has obstructed EU path — in Jan 2025 stated he would "seriously reconsider" EU path and prefers secession
- Four cantons blocked Growth Plan reform package in July 2024
- Still needs: approved reform package, national programme for EU law adoption, chief negotiator appointment

Kosovo — Applicant / Potential Candidate

- **Not yet candidate status**
 - **Blocked by:** Five EU member states (Spain, Greece, Cyprus, Romania, Slovakia) do not recognise Kosovo's independence
 - No progress expected until recognition issue resolved
 - EU-facilitated Belgrade-Pristina dialogue ongoing but stalled
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Enlargement Reform Debates

Orbán's Fall (April 2026) — Game Changer

- The single biggest political shift in EU enlargement
- Péter Magyar's win removed Hungary's chief obstructionist
- EU Ambassador Mathernová (22 May 2026): others were "hiding behind him" and are now exposed
- EU sanctions on Israeli settlers previously blocked by Orbán now proceeding

- Frozen EU funds for Hungary likely to be unblocked under Magyar

Gradual Integration / "Phasing-In"

- New enlargement methodology (2020) divides 35 chapters into 6 clusters — Fundamentals opened first and closed last
- Commission exploring "gradual integration" — allowing candidates partial access to EU policies (Single Market areas, research programmes) before full membership
- Ukraine pushing hardest for this approach

Internal EU Reform First?

- Debate between "enlarge before reforming" vs "reform institutions before enlarging"
- A larger EU would require changes to voting weights (QMV), budget contributions, structural funds allocation
- The 2030 target (Charles Michel at Bled Forum) seen as aspirational for the first ready candidates

Serbia's "Double Standards" Complaint

- Brnabić's accusation reflects growing Serbian frustration
 - Ukraine's fast-track (application to negotiations in <2.5 years) compared to Western Balkans' decade+
 - Serbia argues it is being punished for its friendly stance toward Russia rather than actual backsliding
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EU Institutions & Governance

EU Institutions & Governance

Last updated: 25 May 2026

European Commission — von der Leyen II (2024-2029)

Ursula von der Leyen secured a second term as Commission President after the 2024 European Parliament elections, backed by EPP, S&D, and Renew. Her second-term priorities are built around the **EU Strategic Agenda 2024-2029**, focusing on security, competitiveness, and climate transition — but with the political centre of gravity shifted rightwards.

Key new commissioners and portfolio shifts

Post-2024 election reshuffle gave more influence to EPP-aligned commissioners. Key portfolios:

- **Competitiveness and industrial policy** — elevated as the dominant agenda, reflecting pressure from member states to prioritise economic growth over regulation
- **Defence and security** — a new dedicated portfolio reflecting the post-Ukraine war, post-Trump shift
- **Migration and border management** — hardened line, reflecting the Pact on Migration's adoption and the broader European rightward shift

Political direction

- Von der Leyen has shifted the Commission steadily rightward on migration and competitiveness
- **"Stealth migration drop"** — Politico reported (Nov 2025) that the Commission pushed restrictive measures through without full parliamentary scrutiny
- The Green Deal remains formally intact but has been deprioritised relative to industrial competitiveness
- The 2040 climate target (90% net reduction) was proposed July 2025 but softened by member state pushback

European Parliament — 2024-2029 Term

Composition after June 2024 elections:

- EPP (centre-right): largest group ~185 seats
- S&D (social democrats): second ~135 seats
- Renew Europe (liberals): third ~80 seats
- **Patriots for Europe (far right)**: ~84 seats — led by Jordan Bardella (RN)
- ECR (hard right): ~70 seats — led by Meloni's Fratelli d'Italia
- Greens/EFA: declined to ~50 seats
- The Left: ~35 seats
- ESN (far right, including AfD): ~25 seats

The pro-EU coalition (EPP+S&D+Renew) still holds a majority but is narrower than in 2019-2024. The far right now controls roughly 25-28% of seats across three groups (PfE, ECR, ESN). This has shifted the political centre of gravity — the EPP increasingly votes with the right on migration and competitiveness issues.

European Council — Key Dynamics

- **Orbán's fall (April 2026)** is the single biggest shift — Hungary under Péter Magyar is now pro-EU, pro-rule of law. This removes the most consistent veto player on Ukraine aid, sanctions, and enlargement.
 - **Macron** is serving out his final year (lame duck, cannot run again 2027)
 - **Scholz** replaced by **Friedrich Merz** (CDU) after Germany's Feb 2025 election — more Atlanticist on defence, more conservative on migration
 - **Meloni** remains in power but weakened by March 2026 constitutional referendum defeat
 - **Tusk** (Poland) back at the table after PiS lost power — driving rule of law restoration and EU fund unlocking
 - **Rutte** is now NATO Secretary-General (since Oct 2024) — replaced by Dick Schoof then Rob Jetten in the Netherlands
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Qualified Majority Voting Reform

The debate around moving foreign policy and taxation to QMV (away from national veto) has intensified:

- **Enlargement reform:** Phased accession and QMV on enlargement decisions being discussed as necessary for a 35+ member EU
 - **Sanctions:** Orbán's serial vetoes on Russia sanctions before his fall strengthened the case for QMV
 - **Taxation:** Still unanimous — no progress on moving to QMV
 - **Foreign policy:** Some member states (Germany, France, Benelux) pushing for QMV on foreign policy decisions; others (smaller states) resisting
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Rule of Law — Article 7 and Member States

Hungary (Post-Orbán)

The biggest rule of law story of 2026. Péter Magyar's Tisza Party won a landslide in the April 2026 election, ending 16 years of Fidesz rule. Key developments:

- EU frozen funds now likely to be unblocked — Magyar met von der Leyen in April 2026 to discuss
- Article 7 proceedings likely to be wound down
- The European Parliament's rule of law rapporteur has already signalled a reset in relations

Poland (Under Tusk)

- Tusk's government has been systematically reversing PiS's judicial reforms
- EU funds (€137 billion in RRF and cohesion) were unblocked in early 2024 after milestones were met
- However, PiS-allied President Duda (until Aug 2025) used veto powers to block some reforms — and PiS-aligned Karol Nawrocki won the 2025 presidential election, giving PiS-aligned veto power until 2030
- **Next PiS trial:** Former Justice Minister Zbigniew Ziobro is reportedly a fugitive in the US facing 26 charges

Slovakia (Under Fico)

- Fico's third-term government is moving to dismantle rule of law protections
 - Whistleblower protections under threat (blocked by courts Dec 2025)
 - Party of European Socialists permanently expelled Smer for its far-right turn (Sept 2025)
 - Pro-Russia, anti-Ukraine stance isolates Slovakia within the EU
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Strategic Agenda 2024-2029 — Priorities

1. **A prosperous and competitive Europe** — industrial policy, single market deepening, regulatory simplification
 2. **A green and just transition** — Green Deal, REPowerEU, Fit for 55 delivery
 3. **A secure Europe** — defence integration, security partnerships, border management
 4. **A Europe that protects democracy** — rule of law, media freedom, anti-disinformation
 5. **A stronger Europe in the world** — enlargement, neighbourhood policy, global partnerships
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Next MFF Negotiations (2028-2034)

- The next Multiannual Financial Framework will be the first negotiated with a potential EU of 30+ members
 - Key debates: defence spending (new European Defence Fund expected to be substantially larger), agricultural subsidies (CAP reform inevitable with Ukrainian accession reducing budget for existing members), cohesion policy reform
 - Net contributor countries (Germany, Netherlands, Sweden) pushing for budget discipline
 - EU's own resources debate continues — digital levy, CBAM revenues, ETS expansion as potential new EU-level revenues
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EU-UK Relations

EU-UK Relations

Last updated: 25 May 2026

TCA Review (2026 Scheduled Review)

The Trade and Cooperation Agreement's five-year review clause is active in 2026. Key points of renegotiation:

Auto tariffs cliff edge

- From January 2027, stricter rules of origin for EVs take effect — batteries/components sourced from outside UK/EU will attract 10% tariffs
- UK and EU scrambling for a "technical workaround" to soften the impact (Politico, March 2026)
- Major automakers on both sides face significant cost exposure

Fisheries

- The most contentious issue. Annual quota negotiations remain tense
- France has played hardball — Macron linking fishing access to the wider reset (Politico, May 2025)
- UK position: maintaining larger share post-Brexit. EU position: linking fishing access to other concessions

SPS checks

- Veterinary/SPS agreement talks ongoing but not yet concluded
- Labour has signalled willingness to negotiate a bilateral SPS deal to reduce border friction — a key ask from UK food and farming sector

CBAM alignment

- UK has introduced its own Carbon Border Adjustment Mechanism

- Discussions ongoing about alignment or mutual recognition with the EU CBAM
 - No formal agreement yet
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Windsor Framework Implementation

Current status: The Framework is now largely bedded in operationally:

- "Not for EU" labelling now visible in Northern Ireland supermarkets (Asda first major retailer to implement)
- Green/red lane system for GB-NI goods movement operational
- Parcel delivery scheme opened for GB-NI consumer goods
- Stormont brake mechanism remains unused but exists as a safety valve

Northern Ireland political stability:

- Power-sharing at Stormont has held but tensions persist
- DUP returned to Executive after Windsor Framework deal, but hardline unionist sentiment remains
- No major political crisis as of May 2026 — the framework has removed the immediate trigger for collapse

Further tweaks needed: The Framework is broadly stable but business groups continue to report friction on GB-NI agri-food movements. Some unionist figures argue the brake is insufficient.

Labour Government's Approach (Starmer's Reset)

Starmer's EU reset strategy described as "ruthlessly pragmatic" (BBC, April 2026). He has repeatedly said the reset "does not mean reversing Brexit" but pursuing closer sectoral cooperation.

Defence/Security Pact (May 2026)

The flagship deliverable of the reset. EU foreign policy chief Kaja Kallas stated "fishing shouldn't block a defence pact" (BBC, May 2025 — still live into 2026). A UK-EU security treaty is being negotiated covering military mobility, joint procurement, and intelligence sharing.

Youth Mobility Scheme

- Starmer has signalled openness to including youth mobility as part of the deal
- EU has demanded this as a condition (Politico, Dec 2024 — "Fish, the court and youth access: EU's demands")
- Labour internally divided — TUC chief Paul Nowak urged Starmer not to rule out mobility measures (Politico, May 2025)

Veterinary/SPS Agreement

- Talks ongoing. Seen as "low-hanging fruit" for reducing trade friction without reopening Brexit
- Would reduce border checks on agri-food products

Financial Services Equivalence

- Being pursued on a piecemeal basis
- UK seeking greater equivalence decisions from the EU
- Memorandum of Understanding on financial services regulatory cooperation in place

Horizon/Copernicus Re-entry

- Completed under early Labour government (2024-25)
- UK re-associated with Horizon Europe and Copernicus programmes
- Now operational with UK researchers able to bid for grants

Political Headwinds

- **Labour local election losses (May 2026):** Politico reported "Labour losses rattle EU reset" (11 May 2026)
- **Reform UK gains** under Farage have created political pressure on the reset
- **Labour leadership contest** speculation (Streeter, Burnham) has put Brexit back under political spotlight (BBC, 17 May 2026)
- **Makerfield by-election** being framed as a proxy battle on EU relations

Public Opinion Shift

- Polling consistently shows majority public support for closer UK-EU relations
- David Miliband argued UK needs "national consensus" over rejoining EU (Guardian, 23 May 2026) — reflecting new political acceptability of pro-EU discourse

- Starmer stated Brexit "significantly" hurt British economy (Politico, Dec 2025) — a landmark admission from a sitting PM
 - EU Parliament President Metsola called for "exorcism" of ghosts in UK-EU ties (Politico, Feb 2026)
 - UK seeking closer EU ties driven by Trump/Iran war context and strained UK-US relations
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Other Notable Developments

- **New EU ambassador to UK:** Jukka Salovaara (Finnish diplomat) appointed May 2026 — signals EU's commitment to reset
 - **Extra border checks suspended:** EU border checks at Dover suspended amid heatwave delays (Guardian, 23 May 2026) — operational challenges of post-Brexit border persist
 - **Quitting ECHR debate:** Rights chief warned quitting ECHR would "group Britain with Russia" (Politico, May 2026)
 - **Macron state visit:** Accepted invitation from King Charles for July 2025 (occurred) — symbolic reset moment
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Far-Right & Populist Surge

Far-Right & Populist Surge

Last updated: 25 May 2026

European Parliament Caucuses After 2024 Elections

The 2024 European Parliament elections saw significant gains for far-right and populist groups. Three main groupings cover the far-right spectrum:

1. Patriots for Europe (PfE)

- Formed June 2024 by Orbán, Le Pen, and others
- **Leader:** Jordan Bardella (RN)
- **Third-largest group** in the European Parliament — ~84 MEPs
- Includes: RN (France, 30 MEPs), Fidesz (Hungary, pre-defeat), Lega (Italy), FPÖ (Austria), PVV (Netherlands), Vlaams Belang (Belgium), Vox (Spain), Chega (Portugal), Danish People's Party
- Campaign slogan: "Make Europe Great Again" — held a "MEGA rally" in Madrid (Feb 2025)
- Fiercely anti-EU, nativist, anti-immigration, opposes climate policy

2. European Conservatives and Reformists (ECR)

- Pre-existing group, centre-right to hard-right
- Largest component: Fratelli d'Italia (Meloni, 24 MEPs)
- Also includes PiS (Poland), ODS (Czech), Sweden Democrats, Finns Party
- **4th largest group** — ~70 MEPs
- More pro-Ukraine and pro-NATO than PfE
- Meloni has sought a "respectable far right" positioning — more willing to engage with the EPP

3. Europe of Sovereign Nations (ESN)

- The farther-right, more radical group
- **Includes AfD** (Germany) — excluded by PfE as too extreme
- ~25-30 MEPs
- More explicitly ethno-nationalist, anti-EU, and pro-Russia

Overall: Far-right and hard-right MEPs across the three groups represent roughly 180-200 seats out of 720 — about 25-28% of the Parliament. They are not a majority but are large enough to influence debates and coalition formation.

Country-by-Country

?? France — Rassemblement National

- RN under Le Pen (figurehead) and Bardella (leader, MEP) is the dominant opposition force
- Topped 2024 European election in France with ~31%
- Positioning for **2027 presidential election** — Le Pen remains standard-bearer but Bardella increasingly presented as future
- Édouard Philippe (ex-PM, centrist/right) seen as early favourite "to beat populists" (BBC)
- RN continues to demand: tougher immigration, "national preference" in jobs and welfare, sovereignty from EU institutions
- **Concern:** Le Pen faces potential EU embezzlement trial appeal verdict (7 July 2026) — could bar her from standing

?? Germany — AfD, BSW, CDU Shift Right

- **AfD:** Polling 18-22% nationally — second-strongest party. Strong in eastern Germany. Categorised as *rechtsextrem* in several states. Lead candidate Alice Weidel. Described as "Russia-friendly" — Politico reported Putin's trolls boosting AfD
- **BSW (Bündnis Sahra Wagenknecht):** Polling 5-8%. Left-populist, anti-immigration, anti-NATO, socially conservative. Complicates coalition arithmetic
- **CDU shift right:** Merz shifted CDU rightward on migration — "asylum turnaround," pushbacks, harder deportations. Deliberate strategy to undercut AfD support, risks normalising far-right positions
- **Centre-left decline:** SPD polling in low teens, Greens also declining (Politico: "Germany's center left is on the brink of oblivion")

?? Italy — Giorgia Meloni / Fratelli d'Italia

- In government since Oct 2022. Governing coalition with Forza Italia and Lega
- More pragmatic than feared on Ukraine and EU — but hard line on migration
- **Constitutional referendum defeat (23 March 2026):** 54% No vs 46% Yes — reform to separate judges/prosecutors rejected
- First significant electoral defeat for Meloni. Local elections (May 2026) showed coalition still performing well
- Press freedom concerns: Politico reported "A dangerous new phase: Under Meloni, concerns for press freedom in Italy mount"
- Polling still ~28-30% for Fdi as of early 2026

?? Netherlands — Wilders / PVV

- PVV won 37 seats in Nov 2023 election (first place)
- Dick Schoof became PM (July 2024) — Wilders agreed not to take the premiership
- **Schoof cabinet collapsed (Feb 2026):** PVV withdrew June 2025, NSC withdrew Aug 2025
- **New election Oct 2025:** D66's Rob Jetten narrowly beat Wilders
- Jetten (38) became Netherlands' youngest ever and first openly gay PM (23 Feb 2026)
- Wilders now in opposition, vowing to oppose everything
- PVV had driven "strictest migration regime ever" — including opt-out from EU asylum rules

?? Austria — FPÖ

- **Herbert Kickl (FPÖ)** won the 2024 general election (~28.8%, first place)
- Could not initially form government due to cordon sanitaire by ÖVP and SPÖ
- By 2026, ÖVP increasingly willing to coalise — **FPÖ-ÖVP coalition likely as the next government**
- If Kickl becomes Chancellor, he would be Austria's first far-right leader since WWII
- Politico: "In Austria's Kickl, the EU has its next Orbán"
- Uses term "Volkskanzler" (Nazi connotations) and calls for "remigration"

?? Belgium — Vlaams Belang

- Led by Tom Van Grieken. Largest party in Flanders, ~17-20% nationally
- Came second in June 2024 federal election (surprise defeat to N-VA's De Wever)
- All Flemish parties maintain cordon sanitaire against VB
- Joined Orbán's Patriots for Europe in July 2024

?? Spain — Vox

- Led by Santiago Abascal. Third-largest party (~12-14%)
- Vox surged 2023 but could not enter government. PP falling short of majority

- In coalition with PP at regional level (Castile and León)
- Sánchez's move to grant legal status to 500,000 unauthorised immigrants (Apr 2026) — direct challenge to Vox

?? Portugal — Chega

- Led by André Ventura. Won 18% in March 2024 election (50 seats) — quadrupled 2022 result
- Centre-right AD governs with Chega's support in parliament
- Chega underperformed expectations in 2025 local elections — suggests a ceiling on support

?? Sweden — Sweden Democrats (SD)

- Led by Jimmie Åkesson. Second-largest party (~20-22%)
- Propping up Kristersson's centre-right coalition via Tidö Agreement
- Next election: 13 September 2026. SD positioning to strengthen its kingmaker role
- Successfully pushed most restrictive migration policy in Swedish history

?? Finland — Finns Party

- Led by Riikka Purra (also Finance Minister) — second-largest party, formal coalition partner
- Repeatedly damaged by racism scandals but remains in government ~18-20%
- Purra's position as Finance Minister in austerity government has forced compromises

?? Hungary — Orbán's Fall (April 2026)

The single biggest European political story of 2026.

- **Viktor Orbán** and Fidesz defeated after 16 years in power (since 2010)
- **Péter Magyar** and the Tisza Party won a landslide
- BBC: "Orbán's era was over in a flash and Hungary's next PM is a man in a hurry"
- **Why Orbán lost:** massive corruption scandal (pedophile cover-up), economy/inflation/cost-of-living crisis, EU funds frozen, Magyar's effective grassroots campaigning ("Walk for Hungary" demonstrations 2024-25), younger voters turning decisively against Fidesz, fatigue with "illiberal democracy" after 16 years
- **Magyar:** Pro-EU, anti-corruption, rule of law restoration, reconciliation with Brussels
- Trump's association became toxic — Politico: "Trump turns totally toxic for Europe's far right" (Apr 2026)
- Orbán's removal cleared the way for EU sanctions on Israeli settlers he had previously blocked

?? Poland — PiS Lost Power (2023)

- PiS lost Oct 2023 election to Donald Tusk's Civic Coalition
- PiS remains largest single party (~33-35%). Strong in rural/eastern Poland
- **Karol Nawrocki (PiS-aligned)** won 2025 presidential election — gives PiS veto power over legislation
- PiS in financial trouble — national election commission rejected its financial report (Nov 2024)

?? Slovakia — Fico / Smer

- Fico returned to power Sept 2023 — pro-Russia, anti-Ukraine
- PES permanently expelled Smer for far-right turn (Sept 2025)
- Fico survived assassination attempt (2024) — used it to attack opposition and media
- Government broadly unpopular but Fico's grip remains firm

What's Driving the Surge?

1. **Migration** (dominant factor) — 2015-16 refugee crisis reshaped politics. Ongoing Mediterranean arrivals, integration difficulties keep immigration as the top issue
2. **Cost-of-living / economic insecurity** — post-COVID inflation, Ukraine war energy crisis, housing shortages
3. **Cultural backlash** — against LGBTQ+ rights, gender equality, environmental regulation, multiculturalism
4. **Distrust of institutions** — mainstream parties, media, EU institutions seen as out of touch. Corruption scandals play into anti-establishment narratives
5. **Farmer protests** — 2023-24 protests across Europe channelled by far right
6. **Russian influence** — Politico (May 2026): "Putin's trolls are weakening Merz to boost Russia-friendly far right"
7. **Trump factor (mixed)** — initially energised European far right, but by 2026 his association became toxic (Politico, Apr 2026)

How Has the Mainstream Responded?

Dominant response: co-option, not resistance.

- **Commission (von der Leyen):** Moved steadily rightward on migration — New Pact on Migration, returns deals, externalisation
- **EPP (Weber):** Co-opting far-right positions while maintaining leaky cordon sanitaire on formal coalitions

- **National mainstream right:** CDU under Merz, PP in Spain, KOK in Finland, Moderates in Sweden — all shifting right
- **Cordons sanitaires:** Still intact in Belgium, France (fraying), partially in Germany. Collapsing in Austria. **Abandoned** in Sweden and Finland
- **Left/Socialist response:** Limited. The left has largely accepted rightward framing on migration

Overall verdict: The mainstream has largely conceded the argument on migration and adopted far-right framing, while maintaining institutional barriers to formal power-sharing — barriers that are fraying.

Migration Policy Shift — "Fortress Europe"

- **New Pact on Migration and Asylum (adopted 2024):** Mandatory border screening, faster asylum procedures at borders, solidarity mechanism (relocations or financial contributions), expanded detention
 - **Returns hubs:** Commission finalising a plan for "return hubs" in third countries (echoing Australia's offshore processing and UK's Rwanda plan) — Politico (20 May 2026): "EU closes in on migrant returns deal"
 - **EU-Tunisia deal** (July 2023) — paying third countries to prevent departures. Replicated with Libya, Mauritania, Turkey
 - **UK-EU cooperation on returns** being discussed as part of the reset
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