

ELIAMEP Publications

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Το ρευστό γεωπολιτικό περιβάλλον και οι έντονες ανακατατάξεις στο διεθνές γίνεσθαι, καθώς και η εμφανής αύξηση των εμπόλεμων συγκρούσεων παγκοσμίως απαιτούν νέες και σύγχρονες προτάσεις εξωτερικής πολιτικής. Η εργαλειοποίηση της τεχνολογίας, του εμπορίου, της μετανάστευσης, του κυβερνοχώρου, της ενέργειας - “των πάντων” όπως έγραψε ο Mark Galleoti - προστίθεται στο πολυδιάστατο πλέον πεδίο των διεθνών σχέσεων. Παράλληλα, η υπαρξιακών διαστάσεων κλιματική κρίση λειτουργεί ως πολλαπλασιαστής της πολιτικής αστάθειας και απειλεί το μέλλον του πλανήτη και των νέων γενεών. Σε αυτό το περιβάλλον, οι ενεργές δεξαμενές σκέψης καλούνται - και πρέπει - να συνεισφέρουν στον διεθνή, ευρωπαϊκό και εθνικό δημόσιο διάλογο. Κατά τη διάρκεια του 2025, το Ελληνικό Ίδρυμα Ευρωπαϊκής και Εξωτερικής (ΕΛΙΑΜΕΠ) συνέχισε να παρατηρεί, να καταγράφει και να αναλύει και να προτείνει απτές λύσεις, ενώ παράλληλα ενίσχυσε την ικανότητά του να προβλέπει τις αναδυόμενες παγκόσμιες απειλές, ενσωματώνοντας τη μεθοδολογία του μακροπρόθεσμου σχεδιασμού σε όλα τα πεδία έρευνάς του. Συγχρόνως, η πλούσια και υψηλού επιπέδου ερευνητική δραστηριότητα των ερευνητών και των συνεργατών μας αποδεικνύει την προσπάθεια του ΕΛΙΑΜΕΠ να συμβάλλει ουσιαστικά, με γνώση και τεκμηρίωση, στον δημόσιο διάλογο.

Η παρούσα συλλογή κειμένων παρουσιάζει ένα ευρύ και αντιπροσωπευτικό δείγμα των συνόψεων πολιτικής, των κειμένων πολιτικής, των κειμένων εργασίας, αλλά και μικρότερων σε έκταση ερευνητικών εργασιών, όπως είναι η σειρά “Explainers”. Πρόκειται, ωστόσο, για ένα κομμάτι της συνολικής ερευνητικής δραστηριότητας του ΕΛΙΑΜΕΠ, καθώς δεν αποτυπώνει το σύνολο των δράσεων ή των δημοσιεύσεων. Για παράδειγμα, δημοσιεύσεις που σχετίζονται με την πρόοδο ερευνητικών προγραμμάτων ή συνεισφορές και συνεντεύξεις ερευνητών του ΕΛΙΑΜΕΠ σε διεθνή και ελληνικά ειδησεογραφικά πρακτορεία δεν αποτυπώνονται στην παρούσα συλλογή χάριν συντομίας.

Θα εργαστούμε προκειμένου το 2026 να είναι εξίσου παραγωγικό σε ερευνητική δραστηριότητα. Η ανάδειξη των προκλήσεων της σημερινής εποχής και η παροχή ουσιαστικών και υλοποιήσιμων προτάσεων πολιτικής προς τους σχετικούς θεσμικούς φορείς θα συνεχίσουν να αποτελούν βασικές προτεραιότητές μας.



Έλενα Λαζάρου

Γενική Διευθύντρια ΕΛΙΑΜΕΠ



European Institutions & Policies

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Analysing political dynamics in the new European Parliament: Political Cleavages and Division Lines

The New Political Groups in the European Parliament: Ideological Identity and Cohesion

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Abstract

This paper provides an in-depth analysis of the outcome of the June 2024 European Parliament elections, focusing on the characteristics of national political formations that are represented in Strasbourg and the identity of the political groups in the European Parliament. This analysis is based on two axes of ideological and political nature: (1) the political spectrum (Left to Right), and (2) the disposition of the parties toward European integration. The paper makes use of data from the European Election Study 2024 (EES) exploring EP political groups' (lack of) homogeneity and the varying degree of their internal cohesion.

Introduction

The relatively smooth process of approving the new Commission by the European Parliament and the official start of President von der Leyen's second term in office brought to an end the year long political agitation at the EU level. These developments unfolded with the elections for new members of the European Parliament, in June, peaked with backstage negotiations over the formation of the new Commission over summer, and concluded with its approval in November. During this period, pessimistic forecasts predicted significant political crises, stalemates, delays, and even institutional derailments. Such forecasts gained momentum amid concerns for the role of Hungary's Council Presidency, with its "challenging" past and present relationship with the EU institutions and other member-states as well as the ongoing geopolitical and socioeconomic challenges that would not wait for the EU's lengthy internal political processes.

As we can safely say today, these dire predictions did not materialize, which testifies for the institutional stability of the EU's political system. Despite ongoing turbulence in the broader international environment—including new dimensions of global polarization following Trump's re-election in the U.S., significant changes in the Middle East, and intensified hostilities in the Ukrainian conflict—the EU completed its internal political processes without disruption. However, the same cannot be said for internal political developments in countries like France and Germany, which are intertwined with and influenced by European politics. Domestic political unrest in governing parties underscores widespread dissatisfaction with local, regional, national, and European government policies.

Against the backdrop of a changing political environment across Europe, analyzing the European election results provides an opportunity to detect shifts and perceptions of political reality in member states, identify converging dynamics, and observe divergent trends. These observations highlight European citizens' priorities, voting criteria, and assessments of the political ideological identity of the participating parties. These aspects are crucial for understanding the dynamics of shaping EU political developments and designing policies that address citizens' needs and concerns.

This paper provides an in-depth analysis of specific data emerging from the European Parliament elections, focusing on the characteristics of national political formations that reached Strasbourg and the identity of political groups in the European Parliament. This analysis is based on two axes of ideological and political nature: (1) the political spectrum from Left to Right, and (2) the disposition against European integration. The following section outlines the study's empirical basis, which relies on findings from the European Election Study 2024 (EES). Subsequently, demographic data about election participation and the new political geography of the EP are analyzed. The third section—the paper's main contribution to the analysis of the next EU political cycle—explores EP political groups' (lack of) homogeneity based on the axes mentioned above and their internal cohesion.

Methodology and Empirical Data

This study draws upon findings from the European Election Study 2024 [European Election Study 2024 \(EES\)](#), a post-election survey conducted in all 27 EU member states after the European Parliament elections. It also incorporates data from the latest Eurobarometer. The EES is an international scientific research program involving leading European universities, focusing on European elections, political behavior, and public attitudes toward the EU.¹ The program collects extensive data through surveys and analyses, addressing issues like voter participation, political behavior, influencing factors, attitudes toward EU integration, and the dynamics of European parties and coalitions. Since 1979, the EES has been conducting systematic studies on EP elections, providing comparative data that highlights similarities and differences of voting behaviour among EU member states. This study relies on survey results conducted after the June 2024 European elections, involving 25,904 citizens from all EU member states. The sample comprised 1000 participants per member-

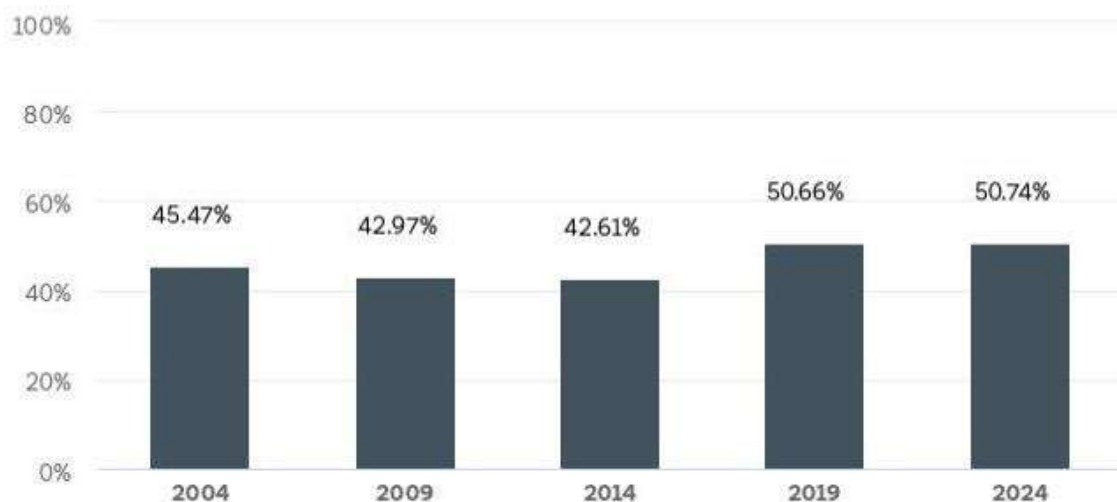
state, with the exception of Malta, Luxembourg and Cyprus, in which 500 citizens were approached. The sample was stratified according to gender, age and geographical dispersion.

The survey extensively recorded voters' ideological preferences on the "Left-Right" axis and their stance on European integration. Specifically, participants were asked to identify their ideological orientation and that of their country's parties participating in the EP elections. Additionally, their stance on EU integration was recorded, with respondents indicating whether they personally supported further integration and asking them to assess their national parties' positions on the matter. This analysis maps national parties' political ideological position as well as their stance on the European integration process, offering significant insights into the parties' dispositions, at least as far as voters in each member state perceive them. Considering these parties' integration into various EP political groups, their political power and influence, and their ideological and European direction, we can form a clear and comprehensive picture of each EP political group's role and dynamics, contributing to a deeper understanding of the EP's political reality.

Turnout, Political Groups, and the Campaign

Turnout by year

Final results



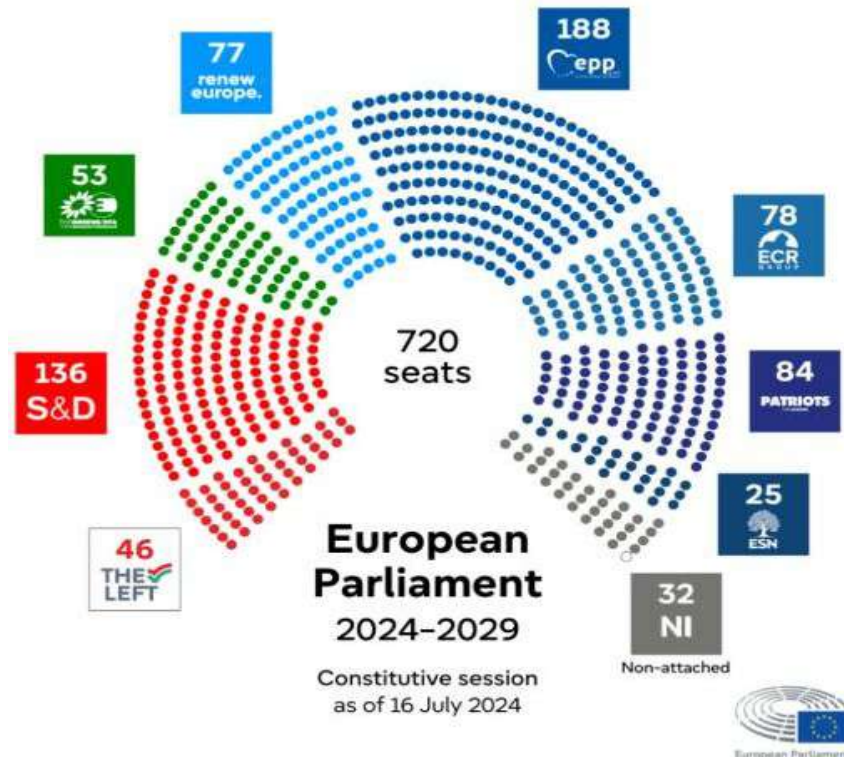
Source: Provided by Verian for the European Parliament



Acknowledgeably, there is a general decline in voter turnout across elections, regardless of the level, reflecting broader political disengagement in European society. Turnout has traditionally been lower for European elections than for national elections. In the most recent 2024 European elections, voter turnout was 50.74%, slightly higher than 2019's official 50.66%. However, this slight increase is misleading because the 2019 turnout included the United Kingdom, which was in the process of leaving the EU and recorded a very low turnout (37%), significantly affecting the average. Taking the UK out and comparing the remaining 27 member-states, an absolute drop of two percentage points is observed (from 52.74% in 2019 to 50.74% in 2024).

The June 2024 elections saw participation from a large number of political parties and independent candidates representing a broad ideological and social spectrum. Voters chose among parties advocating conservative, radical, pro-European, and Eurosceptic views, as well as transnational or localist tendencies. Additionally, candidates employing satirical or humorous approaches to the democratic process participated. The proportional representation system allowed over 200 parties to be represented in the European Parliament, promoting a diversity of opinions.

Despite this diversity, most national political parties joined pre-existing EP political groups, as these groups enjoy particular privileges—such as budget funding, organizational support, and increased political influence through agenda-setting and parliamentary procedures. Forming a new political group requires at least 25 MEPs and representation from at least seven EU member states.



While most political groups in the EP remained stable, notable changes occurred. An existing political group, "Identity and Democracy" (ID), dissolved, and two new groups emerged: "Patriots for Europe" (PfE) and "Europe of Sovereign Nations" (ESN). Both newcomers are characterized by Eurosceptic positions and anti-European rhetoric. The PfE, created from members of the dissolved ID group led by Marine Le Pen and Viktor Orbán, is now the third-largest force in the EP. The ESN, initiated by Germany's far-right AfD party, is smaller but more intensely anti-European, strongly opposing EU policies. Although MEPs in these groups have often criticized the EU for opaque policy-making processes and a *modus operandi* lacking accountability, the formation of PfE and ESN was the outcome of behind-the-scenes negotiations raising significant transparency concerns. For example, PfE was formed immediately after the elections, eventually reaching 84 MEPs, making it the third-largest EP group. Its three founding pillars include Viktor Orbán's *FIDESZ* party (previously independent after leaving the EPP in 2021), the *ANO 2011* party from the Czech Republic (formerly part of the Renew group), and Herbert Kickl's Austrian party (formerly in ID). Notably, no participating parties pre-announced the group's creation. Despite spearheading this initiative, Marine Le Pen's RN party joined only after France's national elections to avoid undermining the more moderate profile that had built domestically.

The election campaign across member states focused almost exclusively on internal political disputes, effectively turning the European elections into informal referenda on government policies. Besides the effect on governing parties, however, opposition forces also faced challenges, like, for example, in Greece, where the political leaders of the two major opposition parties were heavily contested post-election.

In many member states, national formations (not necessarily parties) were created without a clear connection to European political groups, leaving voters unaware of which political group elected MEPs would join. For example, in the Czech Republic, the SPOLU coalition elected six MEPs, three of whom have joined the EPP and three others the ECR group—two groups with different European integration stances. In Italy, the coalition *Alleanza Verdi e Sinistra* succeeded in having 6 MEPs elected, four of whom have joined the pro-Europe Green Party, while the remaining two have become members of

the more Eurosceptic political group of the Left. Similar phenomena were observed in Italy, the Netherlands, Poland, and Spain. Conversely, in Sweden, Romania, Lithuania, and others, parties supporting seemingly opposing political agendas have ended up in the same political group in the EP.

In a nutshell, voters often elected parties without apparent European affiliations, exacerbating confusion about the precise dynamics of each ideological pole in the EP. This highlights the absence of substantive dialogue about Europe and the European integration process during the pre-electoral campaign. Unless political parties clarify in advance which political group will join, European elections will continue being perceived as tools of internal political contestation.

Political Groups in the EP: Mapping Their Political and Ideological Base

The composition of EP political groups reveals a mosaic of political voices and opinions, often contradictory and conflicting. To conduct an in-depth analysis of their political and ideological base, derived from the composite parties that comprise them, this study relies on two key questions of the EES survey results. The first asked voters to place political parties and themselves on a scale from 0 (far-left) to 10 (far-right). The answers to this question are represented on the horizontal axis in subsequent diagrams. The second question addressed European integration, asking respondents to evaluate their national parties' positions and their own opinions about EU integration's trajectory, again on a scale from 0 to 10, where zero indicates "integration has already gone too far" and 10 indicates "integration should be furthered." The answers to this question are plotted on the vertical axis.

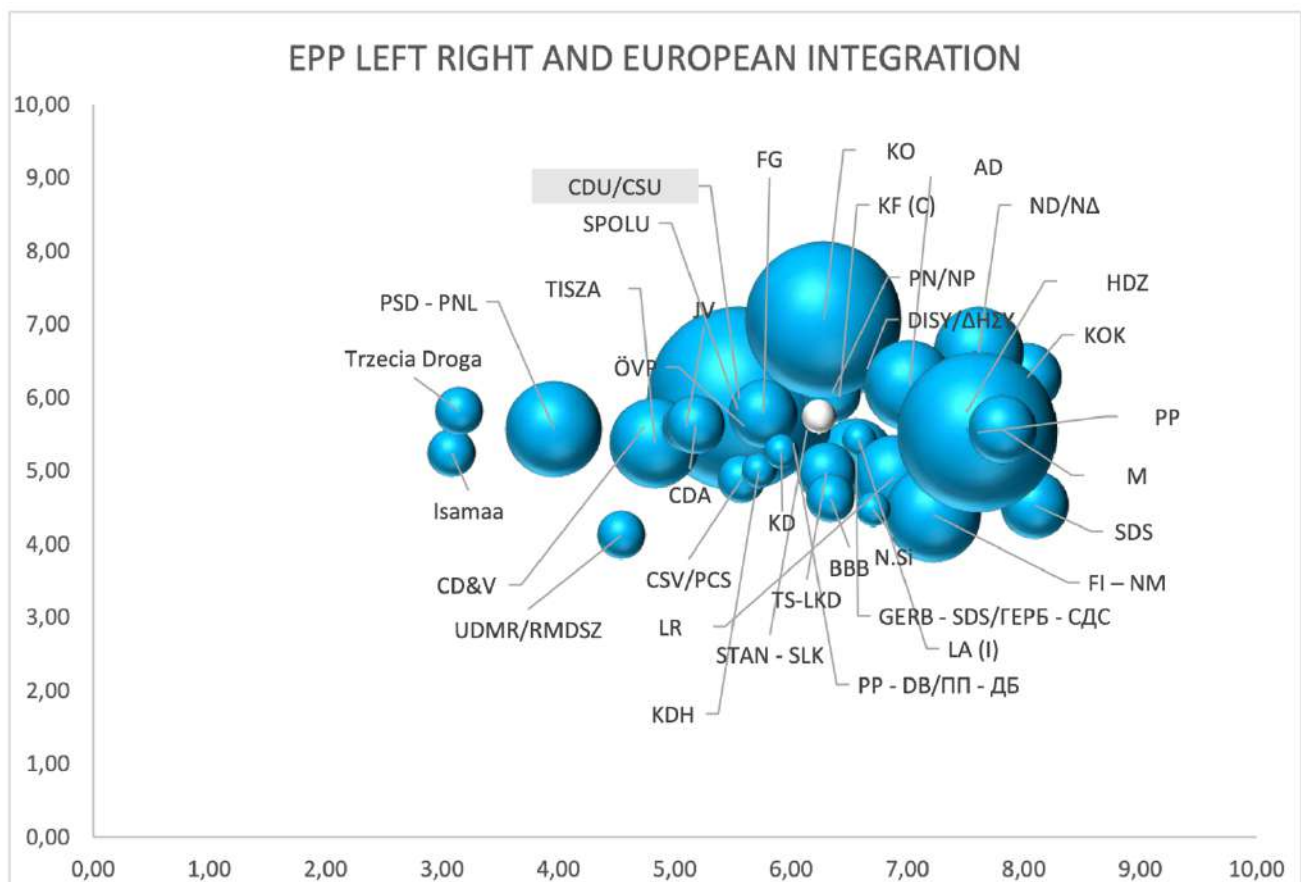
It is essential methodologically to stress that the identification process has a powerful subjective element. However, despite such subjectivity, the responses provide valuable insights into citizens' perceptions of parties' relative positions. The methodology highlights the relational use of terms like 'Left' and 'Right' in different member-states and political cultures. As we will see in the analysis of the composition of the EP political groups, it is not rare that parties identified by the participants in the survey as centrist parties or center-left ones at the national level join a 'right' or 'center-right' political group in the EP and vice versa. In other words, what is considered 'Left' and 'Right' depends on the historical and socio-political context of each national demos.

The results enable mapping the two primary dimensions of EP political groups—ideological alignment and positions on European integration. For each political group, we have created a graph summarizing the survey findings. Parties with elected MEPs that have joined different EP political groups are classified in all groups according to the number of their MEPs in each group. Finally, the mapping includes almost all parties that participated in the European elections, except for small national parties with limited influence before the elections. These parties were not included in the pre-election survey but still managed to elect representatives to the new EP. Despite its methodological shortcomings, this approach offers a clear and structured tool for analyzing the EP's new political geography.

The following Table, taken from the official webpage of the EP², offers a comprehensive overview of MEPs per member state and political group as the figures stand at the time of publication. Due to the existing MEPs' mobility across political groups, these numbers may change marginally without substantially affecting the core ideological and political identity of each group. The analysis of the composition of each group follows after the Table. The numbers in the following Table reflect the roster of the EP political groups on 6 September 2024, having incorporated minor shifts that occurred after July 2024. This explains the small divergence with the Figure above in the text, which depicts the situation as it was on 16 July 2024 at the constitutive session of the EP for the new five-year term. Following this comprehensive Table, we will analyse each political group separately.

Country	EPP	S&D	PfE	ECR	Renew	Greens/EFA	The Left	ESN	NI	Total
Belgium	3	4	3	3	5	2	2			22
Bulgaria	6	2		1	3			3	2	17
Czechia	5		9	3		1		1	2	21
Denmark	2	3	1	1	4	3	1			15
Germany	31	14			8	15	4	14	10	96
Estonia	2	2		1	2					7
Ireland	4	1			6		3			14
Greece	7	3	1	2			4		4	21
Spain	22	20	6	2	1	4	4		1	60
France	6	13	30	4	13	5	9	1		81
Croatia	6	4		1		1				12
Italy	9	21	8	24		4	10			76
Cyprus	2	1		1			1		1	6
Latvia	2	1	1	3	1	1				9
Lithuania	3	2		2	2	1		1		11
Luxembourg	2	1		1	1	1				6
Hungary	7	2	11					1		21
Malta	3	3								6
Netherlands	6	4	6	1	7	6	1			31
Austria	5	5	6		2	2				20
Poland	23	3	2	20	1			3	1	53
Portugal	7	8	2		2		2			21
Romania	10	11		6	3	1			2	33
Slovenia	5	1			2	1				9
Slovakia	1				6			2	6	15
Finland	4	2		1	3	2	3			15
Sweden	5	5		3	3	3	2			21
EU	188	136	86	80	75	53	46	26	29	719

European People's Party - EPP

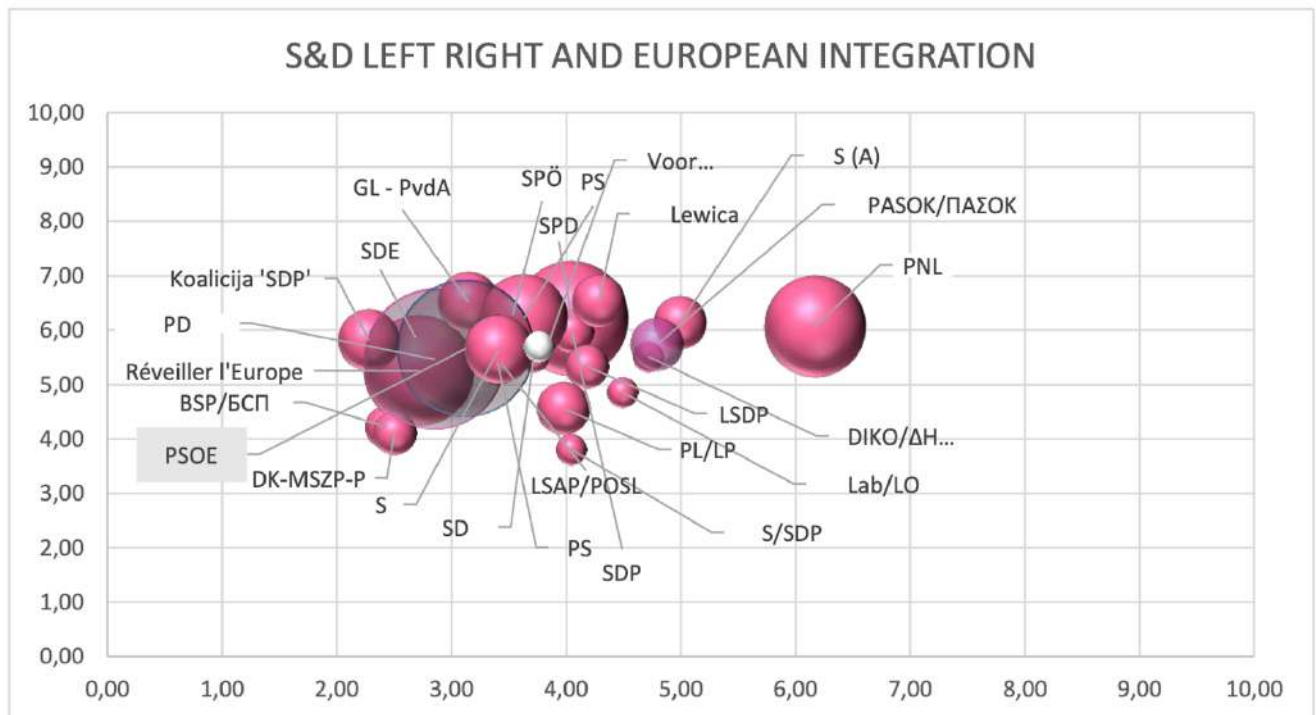


The **European People's Party (EPP)** political group comprises parties from all EU member states and has 188 MEPs, making it the most significant force in the European Parliament. The largest parties in the group are Germany's CDU/CSU, with 29 MEPs, followed by Poland's KO, with 23 MEPs, and Spain's PP, with 22 MEPs. The white sphere in the diagram indicates the center of gravity of the EPP political group.

The average score for ideological placement (Left-Right) is 6.20, positioning the EPP in the center-right space. However, there is significant internal variation. Parties like Slovenia's SDS (8.1) and Finland's KOK (8.03) take a more right-leaning stance. In contrast, Estonian voters place the Estonian party ISAMAA essentially on the left side of the political spectrum (3.08).

The average support for European integration is 5.75, which is considered relatively high. More substantial support is observed in parties such as Poland's KO (7.06) and Greece's *New Democracy* (6.61). In contrast, the lowest support is recorded by Slovenia's N.Si and SDS (4.12 and 4.48, respectively) and Romania's UDMR/RMDSZ (4.12). Nevertheless, despite differences, the distribution of support for European integration is relatively uniform. The EPP maintains a high level of support for European integration despite the national ideological divergence of its parties. Despite its ideological diversity, support for the EU remains one of the main factors of cohesion and unification within the EPP group.

The Progressive Alliance of Socialists and Democrats - S&D



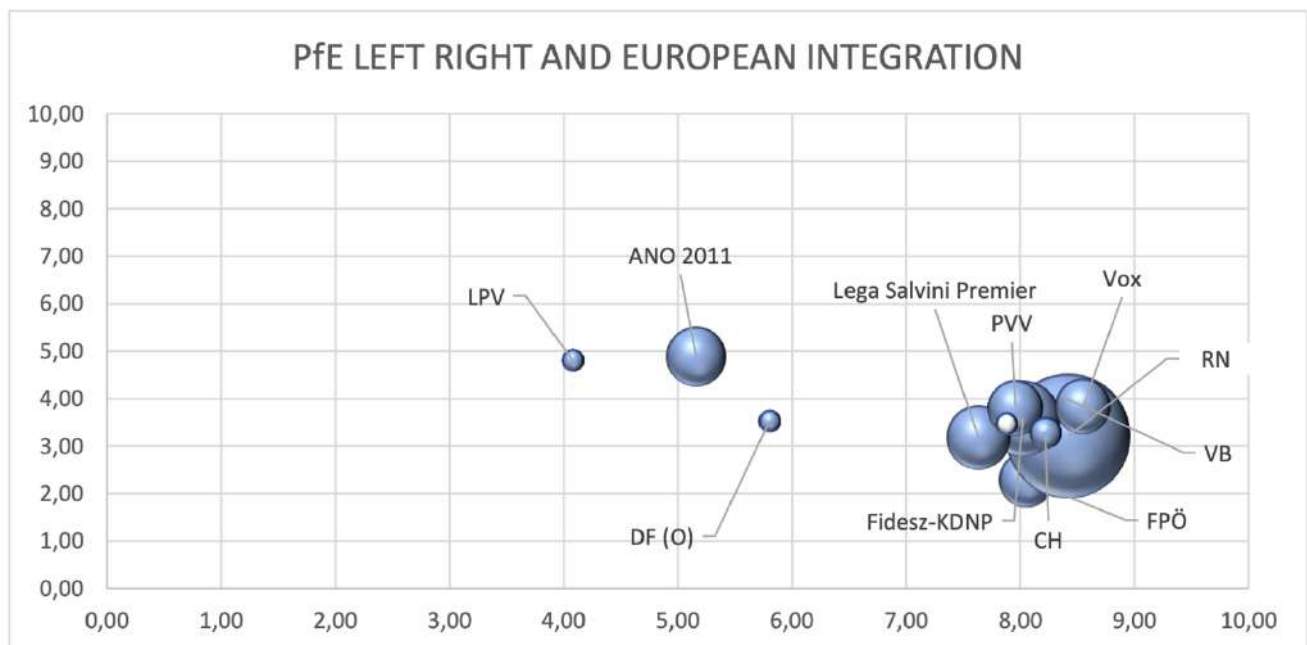
This group is the second-largest political group in the European Parliament, with 136 MEPs from 25 member states. The strongest parties in the group are the Italian PD, with 21 MEPs, and the Spanish PSOE, with 20 MEPs.

The average ideological position of the S&D parties is 3.76, placing the group clearly in the center-left space. On this axis, the parties from Bulgaria (BSP) and Croatia (*Koalicija 'SDP'*) are the most 'left-leaning' with 2.44 and 2.28, respectively. DIKO (Cyprus) and PASOK (Greece) are closer to the center with 4.71 and 4.79 respectively. The right-wing party in this group is the PNL, from Romania, with a score of 6.17, which is considered 'right-wing' in the Romanian political scene but belongs to this political group of the EP.

Regarding support for European integration, the average value is 5.70, similar to that of the EPP. The most 'pro-European' parties are *GL - PvdA* (Netherlands) (6.57) and *Lewica* (Poland) (6.52), while on the opposite side with the lowest support for the EU are BSP (Bulgaria) (4.22) and the *DK-MSZP-Dialogue Alliance* coalition (Hungary) (4.11). The parties in the group generally show a positive attitude towards the EU, with minor differences mainly stemming from national political peculiarities rather than ideological divergences.

Overall, the Socialist Group, despite its political heterogeneity, shows cohesion in its support for European integration and remains ideologically center-left.

Patriots for Europe - PfE



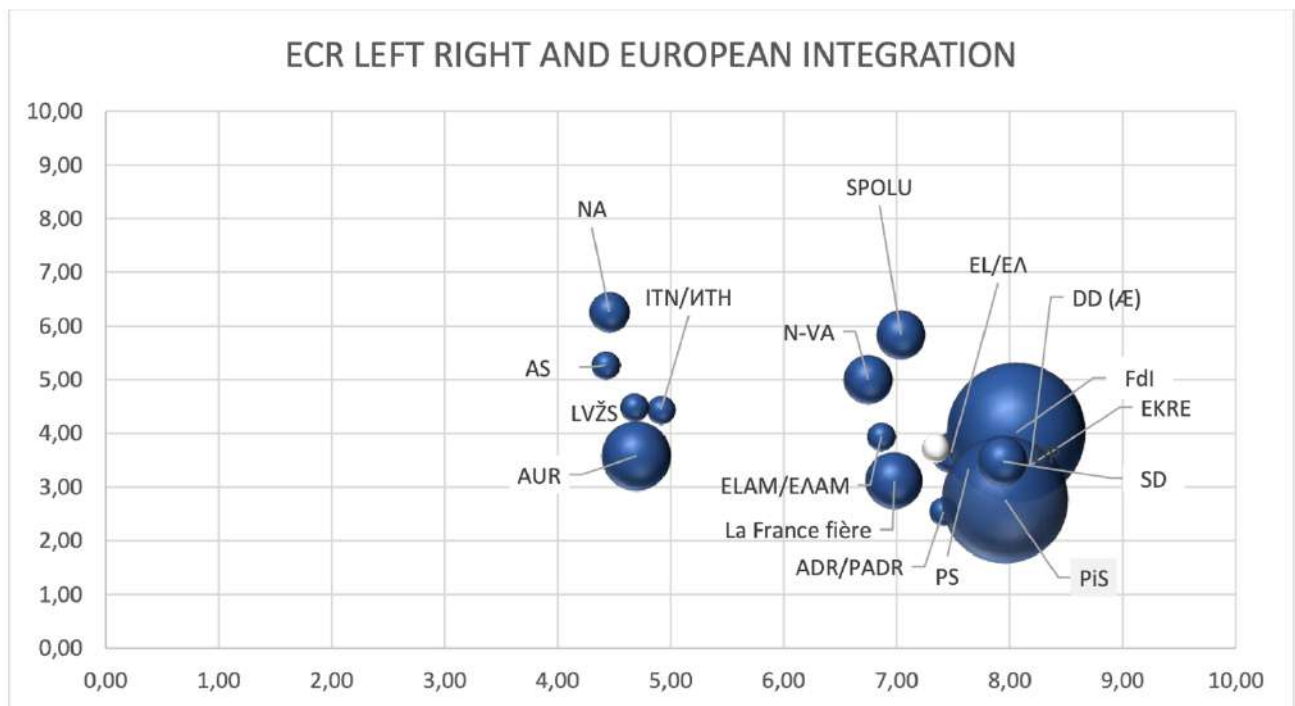
The "Patriots for Europe" (PfE) group includes parties distinguished by their right-wing and far-right ideological positions, with Eurosceptic or anti-European views. It is the third largest political group in the European Parliament, with 86 MEPs, although its geographical origin is limited, as it includes parties from only 13 member states.

The average ideological position of the group is 7.87, placing it clearly in the Right/far-right space. The most extreme positions are recorded in parties such as Vox (Spain) with 8.55, Le Pen's RN (France) with 8.42, and CH (Portugal) with 8.22. In contrast, more centrist positions are held by ANO 2011 (Czech Republic) with 5.16 and LPV (Latvia) with 4.08. Notably, as mentioned before, ANO 2011 was a member of the liberal group in the previous term of the European Parliament.

The group's stance towards European integration is generally negative, with an average support of only 3.18. The parties FPÖ (Austria) with 2.29 and RN (France) with 3.21 share the most negative positions. On the other hand, LPV (Latvia), with 4.81, and ANO 2011 (Czech Republic), with 4.88, stand out for their comparatively more positive stance.

The group's geographical and ideological diversity is much smaller compared to the two largest political groups. Le Pen's party, with 30 MEPs, and Orbán's party exert strong influence, controlling the absolute majority of members. Orbán's presence as the Prime Minister of Hungary ensures the group's influence in the European Council, making it a significant factor in shaping policies at the EU level.

European Conservatives and Reformists - ECR



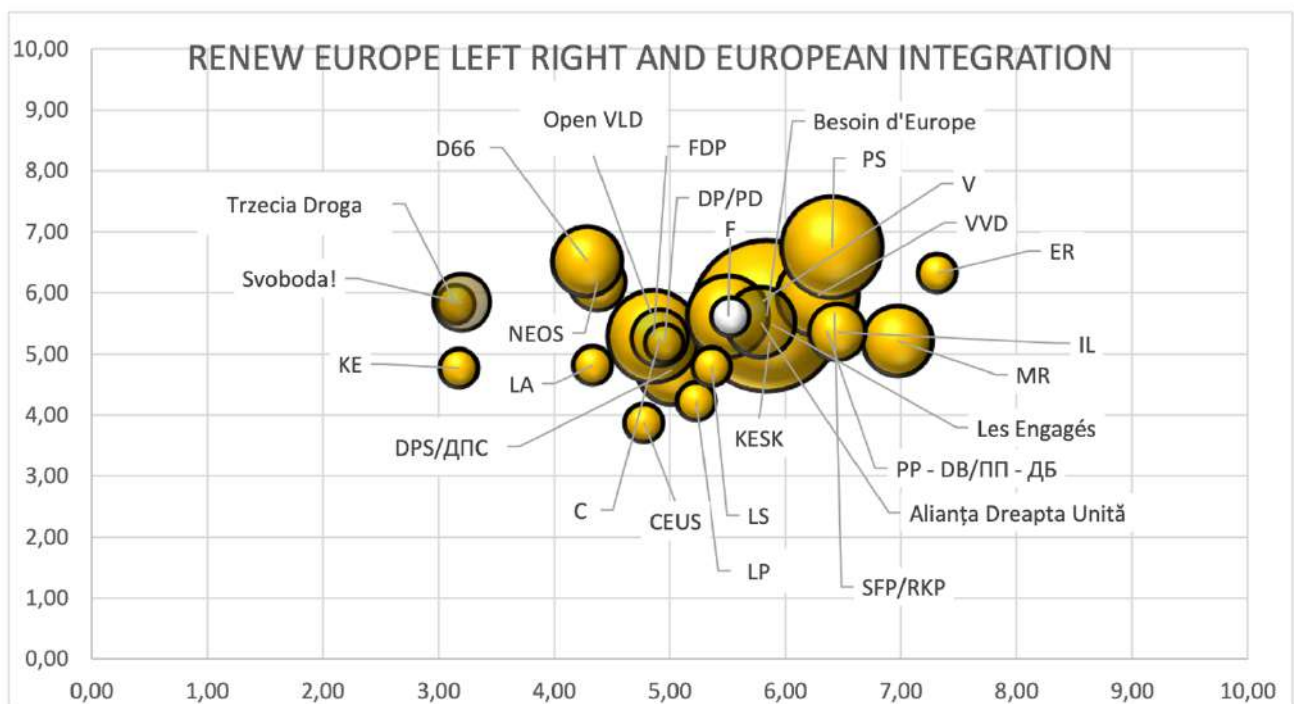
The "European Conservatives and Reformists" (ECR) group mainly consists of parties that adopt conservative positions and express reservations and concerns about further European integration and strengthening central power in Brussels. The group features representatives from 18 member states and has a significant presence in the Commission through the Italian Vice-President of the Commission, Raffaele Fitto, who comes from the party *Fratelli d'Italia* (Fdi) of the Italian Prime Minister, Giorgia Meloni. This party is the most significant force in this political group, with 24 MEPs.

The average ideological position of this group is 7.35, placing it also in the right-wing space. Parties with more extreme right-wing positions include EKRE (Estonia), with a score of 8.18, DP (Croatia), with 8.33, and Fdi (Italy), with 8.06. On the other hand, more center-right positions are held by five parties, namely AS (Latvia), LVŽS (Lithuania), NA (Lithuania), AUR (Rumania), and ITN/ITH (Bulgaria).

The average support for European integration is 3.72, indicative of the parties' reservations regarding further integration. The parties with the lowest support for the EU are EKRE (Estonia) with 3.40, the coalition *La France fière* (France) with 3.11 and ADR/PADR (Luxembourg) with 2.54. In contrast, the NA (Latvia) party shows the greatest support for European integration, with a score of 6.26.

Although the ECR group is the fourth largest, it has more significant political influence than the PEF, as it includes political forces from more member states and has a presence in member state governments and the Commission. However, its ideological cohesion is more diverse, including centrist parties, and on issues of European integration, it shows significant heterogeneity, although the dominant trend is not in favor of further integration.

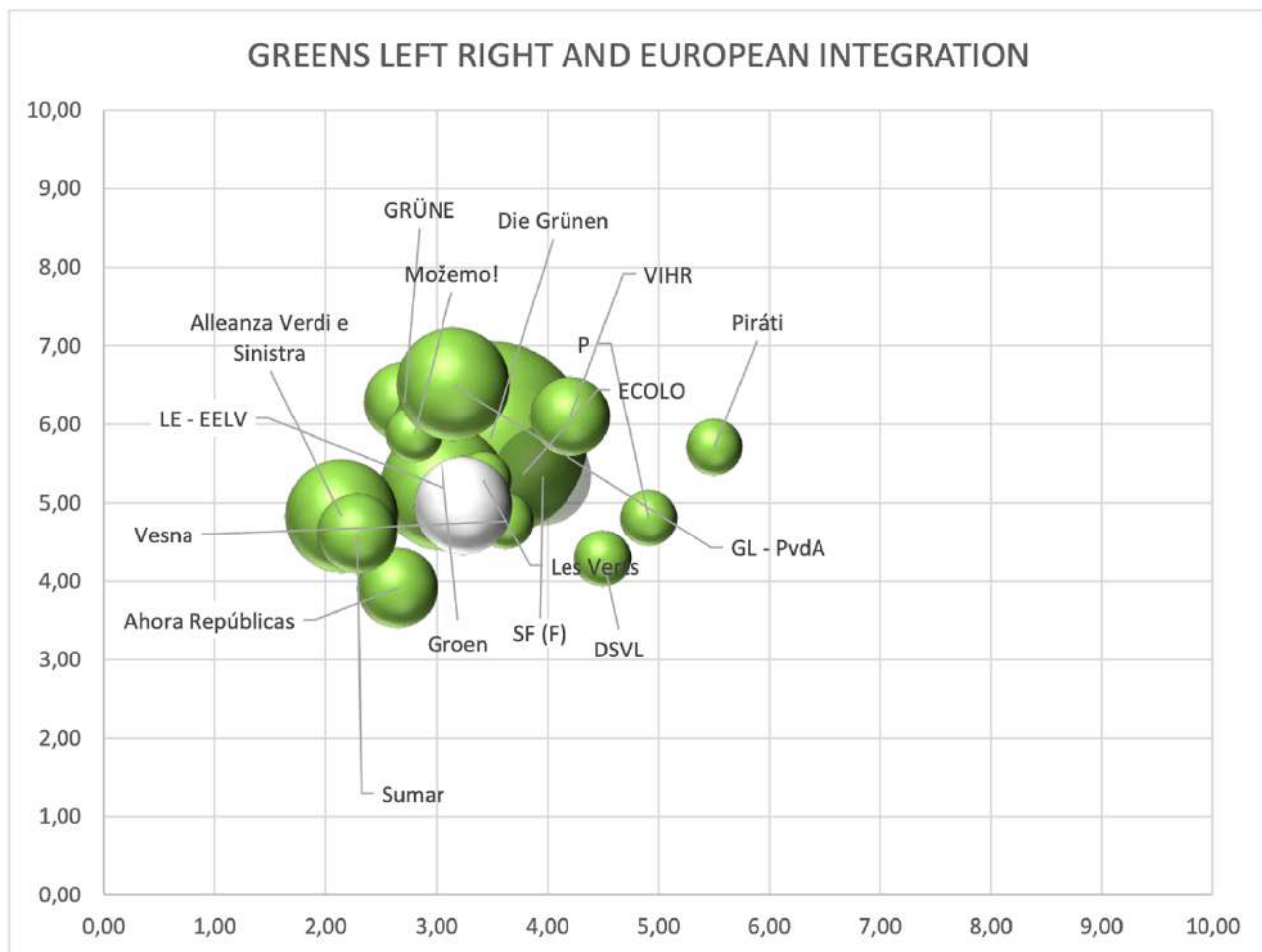
Renew Europe - RE



The "Renew Europe" group has a presence in 20 member states, participating in governments and the Commission. Notably, it consists of many relatively small parties, with the largest being the French party of President Macron, which has -as a coalition of parties- 13 MEPs out of the group's total of 75 and plays a leading role. The group's influence has significantly decreased compared to the previous session of the European Parliament.

The group's ideological average is 5.53, making it centrist. Its score for European integration is 5.61, classifying it as a pro-European force. The ideological composition of the group is very diverse. It includes parties from the Left, such as *Trzecia Droga* from Poland (3.15), but also two parties from Estonia with a significant ideological distance between them, *Eesti Keskerakond* (3.18) and ER (7.31). Support for European integration is high. With the exception of the Spanish CEUS (3.87), the other participating parties have a clear pro-European stance. The group has much more significant influence than the number of its MEPs suggests, as it engages in various governments and the Commission.

Renew Europe remains a group that promotes liberal ideology and supports European integration, particularly emphasizing cooperation and strengthening institutions. The range of ideological positions reflects the diversity of its members.



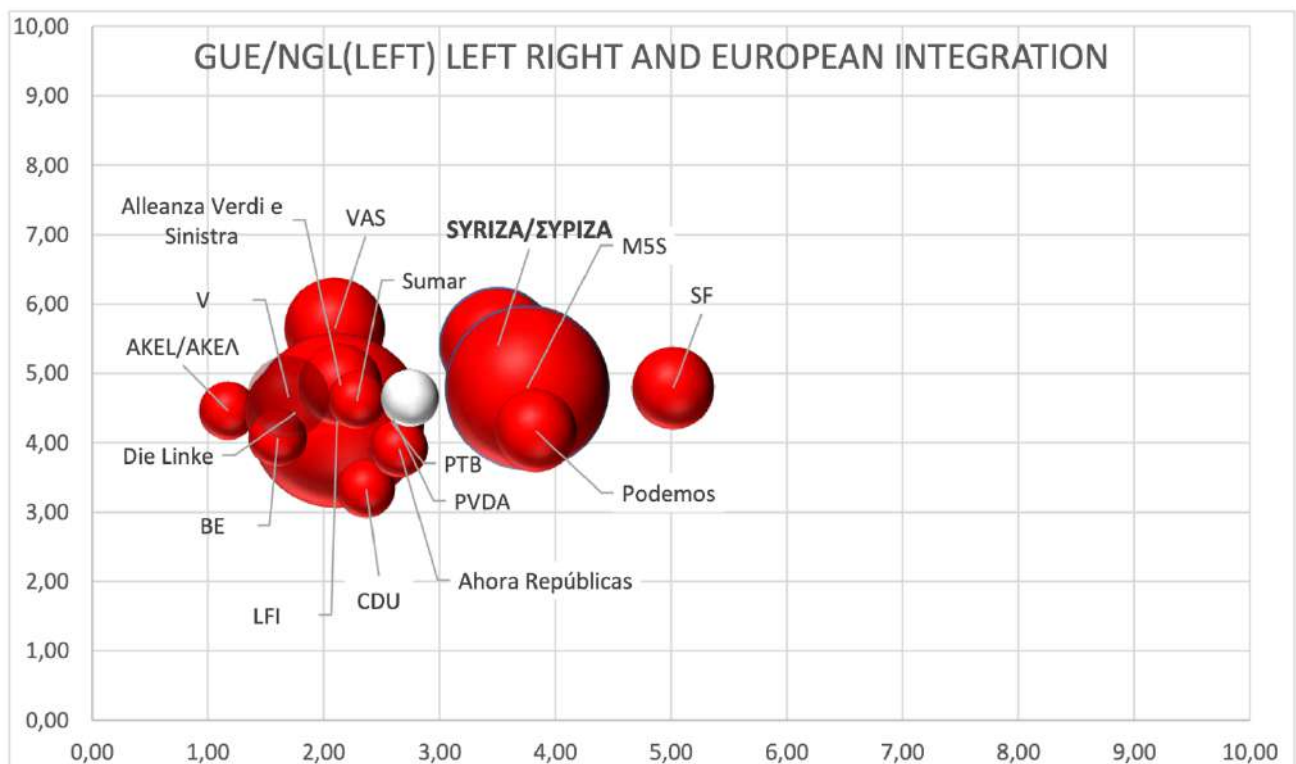
The "Greens/European Free Alliance" (Greens/EFA) group includes parties with a strong environmental, social, and progressive agenda. They often support social justice, human rights, and European integration, positioning themselves mainly on the left-wing of the political spectrum. Its 53 members come from 17 countries, with the strongest participation coming from the German Green Party, with 15 MEPs.

Apart from the Czech party *Piráti*, which Czech voters characterize as a center-right party (5.51), all other parties in the group have a clear left-wing ideology. This is also reflected in the average ideological scale of 3.30, placing the Greens in the broader left-wing space.

In the field of European integration, the Greens maintain a clear European orientation with an average of 5.43. The most pro-European party is the Dutch coalition *GL - PvdA* (6.51).

The Greens group is strongly progressive, emphasizing climate policies and social justice. Their support for European integration is generally high, with some exceptions in specific countries. Despite the differences, the parties in the group remain focused on environmental and social reforms.

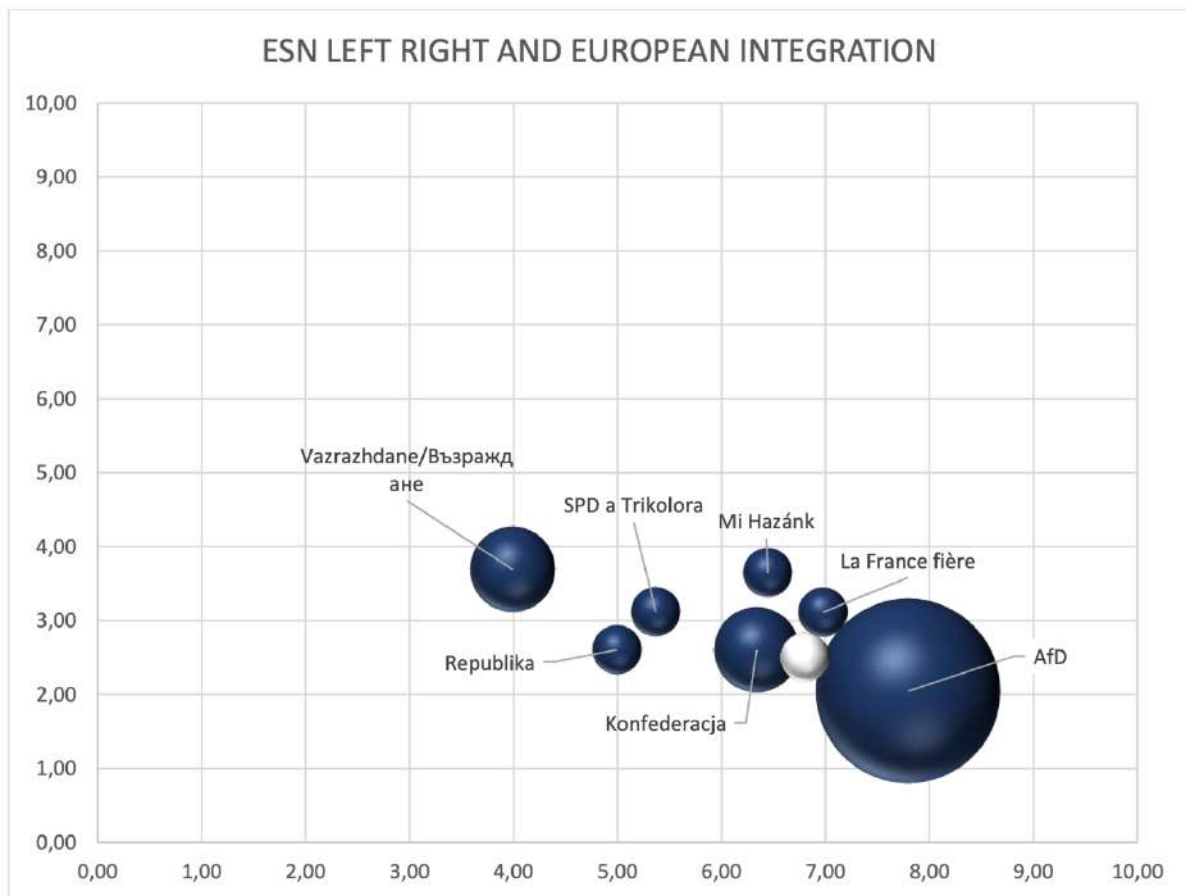
The Left in the European Parliament - GUE/NGL



The Left group in the European Parliament includes parties from various EU countries with standard references to social justice and opposition to neoliberalism. Despite its strong political identity, its influence is limited, with presence in only 12 of the 27 member states and minimal government participation (except for Spain).

The average of this group on the ideological scale is 2.74, thus having a clear left-wing disposition, while on issues of European integration, it tilts rather towards Euroscepticism (4.64). The largest parties in the group are the French LFI, with 10 MEPs, followed by the German *Die Linke*, the Spanish *Podemos* and the Greek *SYRIZA*, with four MEPs each. Italy is represented by two parties, with ten MEPs together.

Actually, the two Italian parties (M5S, 4.83 and *Alleanza Verdi e Sinistra*, 4.79) and SYRIZA (5.40) are the most positively inclined parties in this group regarding European integration. In contrast, the parties from Germany (*Die Linke*, 4.43) and Spanish (PODEMOS, 4.17), are considered by the respondents in their respective countries as the most leftist ones, behind only the Portuguese party *CDU*.

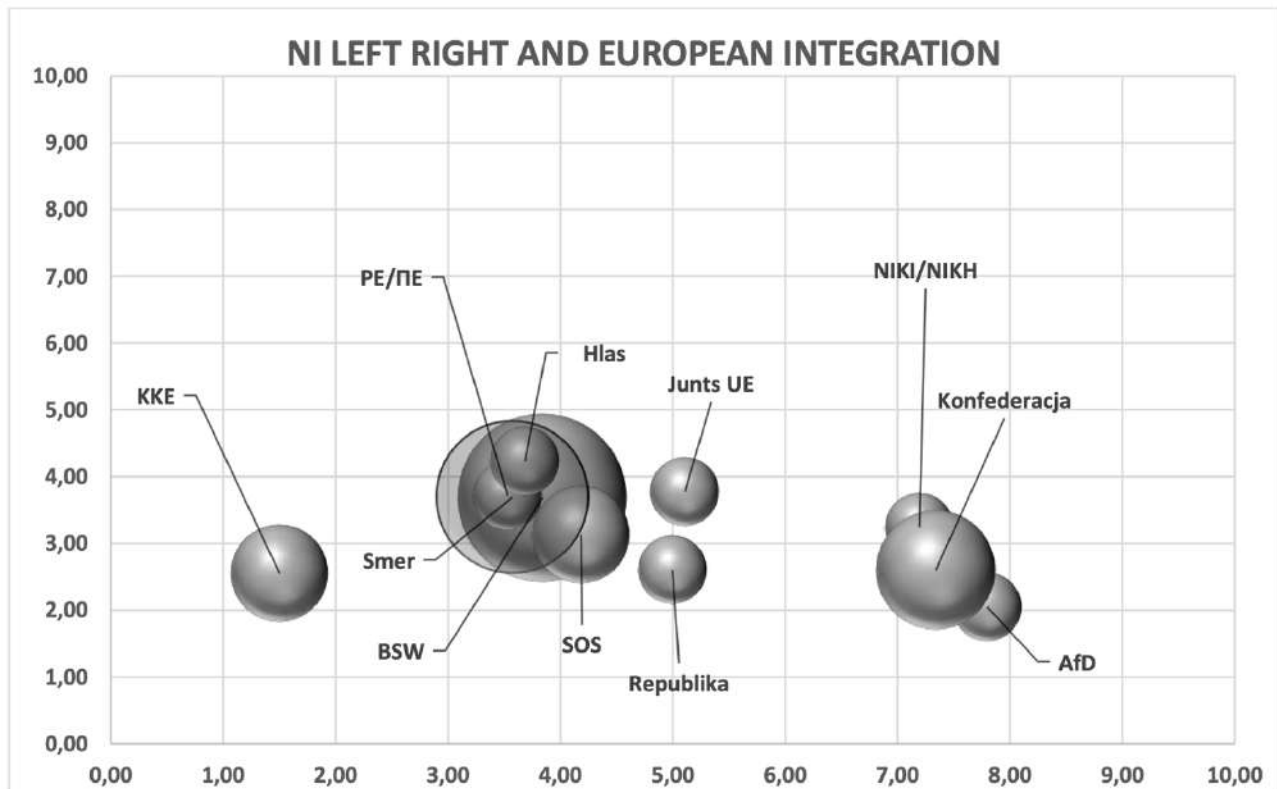


The ESN is a political group that expresses Eurosceptic and nationalist positions, with the dominant party being the far-right Alternative für Deutschland (AfD) from Germany, which has 14 of the group's 26 MEPs. It is a group with a high degree of heterogeneity. Its ideological position has an average of 6.8 (right-wing). However, the AfD is positioned much further to the right than this average.

Overall, the political group is very negatively disposed towards further European integration, showing a particularly low support for it (2.50) and stressing instead the importance of sovereign rights of each member-state.

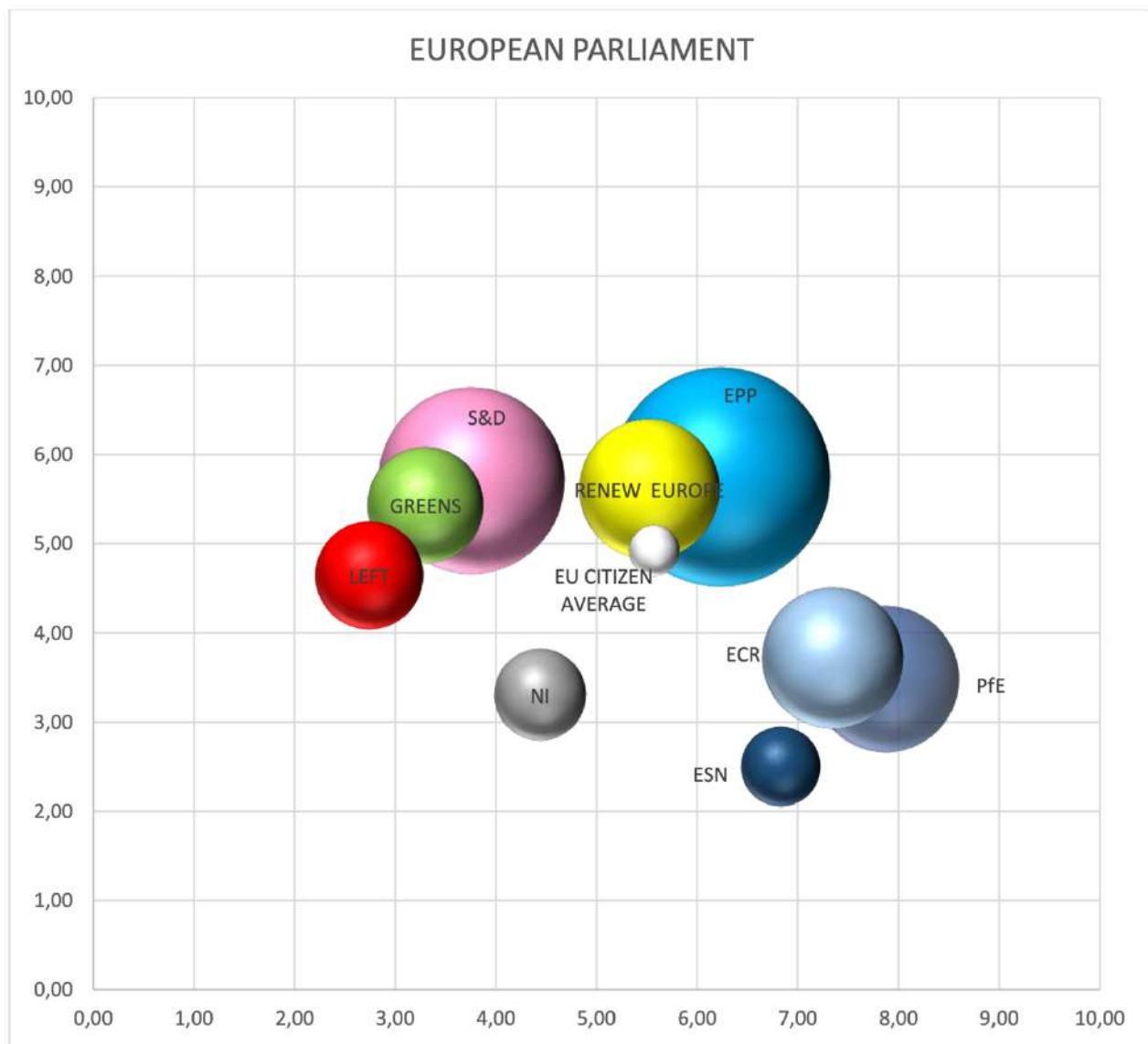
However, the group has a fragile existence, as it gathers the minimum necessary support of 26 MEPs from 8 countries, including one MEP from the French coalition of *La France fière*, who opted for joining ESN instead of the ECR unlike the other MEPs of his party. In any case, this political group is very vulnerable to member losses.

Non-Inscrits - NI



Finally, a group of 29 independent MEPs form a distinct cluster (but not a political group). In essence, they share an anti-European disposition but have entirely different ideological orientations. Independent MEPs have limited influence in the works of the European Parliament, since their interventions are limited to the submission of questions and voting. Among the Non Inscrits, there are two Greek MEPs from the Communist Party (KKE) and another two, one each from *Niki* and *Plefsi Eleftherias* (PE). Additionally, one MEP from the German AfD has not followed so far his colleagues into the ESN. Generally, the isolation of these MEPs from the mainstream EP political processes reduces their influence and effectiveness in promoting political or legislative changes.

Cohesion of Political Groups

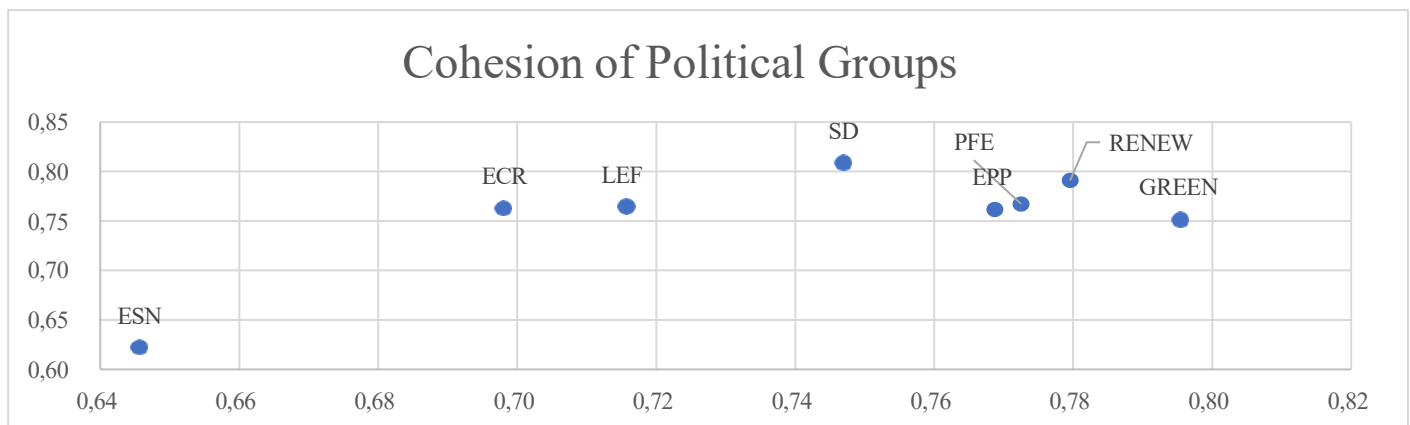


The above chart provides an overall picture of the political groups in the European Parliament. The ESN group is positioned less to the right than the PfE, mainly including small anti-system parties without a clear ideological identity, which affect the 'mean' of the group without reflecting accurately the rhetoric and the political ideology of the group. However, as a small group, each member strongly influences this mean.

Political groups feature a more significant differentiation along the Left and Right ideological axis but a greater relative convergence as far as European integration is concerned. The parties EPP, RENEW, S&D, and GREENS are considered to share the same level of support towards the EU. They have not only approved the new European Commission but actively participate in many member-states' governments. This increases the chances of political convergence in the next five-year political cycle of the EU, especially on critical issues.

However, the political groups in the EP show significant deviation in terms of their cohesion. The assessment of cohesion includes the following methodological steps: first, calculation of the weighted average for each political group; second, calculation of the weighted dispersion (smaller dispersion (σ^2) means greater cohesion); and third, final calculation of cohesion based on the above indicators [$C=1 - (\sigma/\text{max range})$]. According to the common assumption applied to the grading of Cronbach's Alpha (α), a statistical index used to measure the internal cohesion or reliability of a set of items (e.g., questions in a questionnaire), it is accepted that: if $C>0.75$ then high cohesion is observed; if $0.65>C>0.75$ medium cohesion is detected, and if $C<0.65$, low cohesion is observed. The Table below presents the cohesion of each political group for the two axes of analysis:

Political Group	Ideological Position	European Integration
EPP	0.77	0.76
S&D	0.75	0.81
PfE	0.77	0.77
ECR	0.70	0.76
RENEW	0.78	0.79
GREEN (Green /EFA	0.80	0.75
LEFT (GUE/NGL)	0.72	0.76
ESN	0.65	0.62



As shown in the above chart, in terms of ideological homogeneity:

- The political groups GREEN, RENEW, PFE, and EPP show significant ideological cohesion.
- In contrast, the ESN group shows the lowest ideological cohesion, indicating strong internal differentiations. In reality, this political group is a conglomeration of small anti-system and anti- European parties without a clear ideological identity.

Regarding their position on European integration:

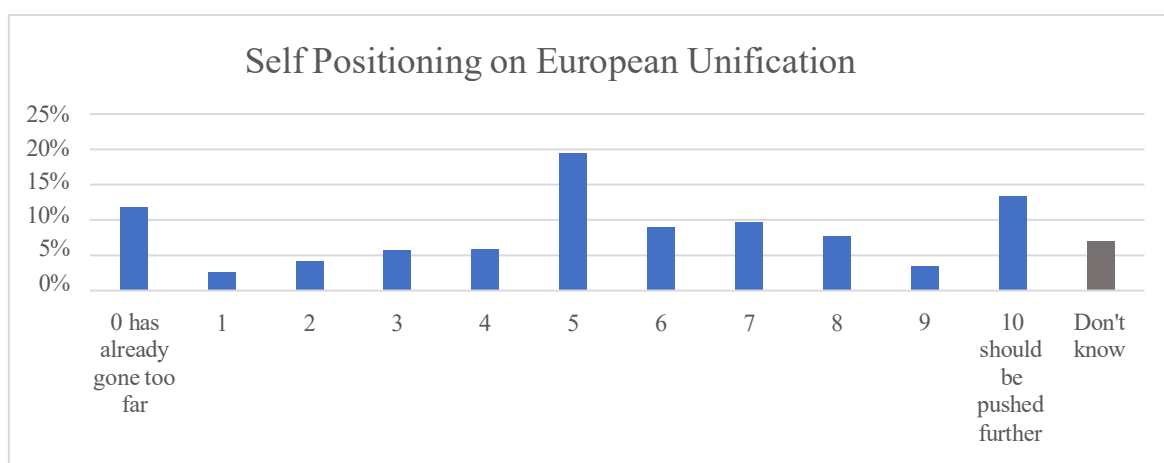
- The RENEW and SD groups show the highest levels of cohesion.
- Conversely, the ESN group again records the lowest performance.

Overall, the political groups PFE, RENEW, GREEN, and EPP show high cohesion on both axes, demonstrating relative homogeneity and a distinct political identity. The LEFT and SD groups have satisfactory but slightly lower cohesion. The ECR group shows satisfactory cohesion on the European integration index, with a mainly anti-European agenda but weaker cohesion in terms of the ideological positioning of its members. Finally, the ESN group shows low cohesion on both axes, reflecting internal contradictions. This is not surprising, as the group was opportunistically created to meet the minimum membership requirement for obtaining the privileges of a political group in the European Parliament.

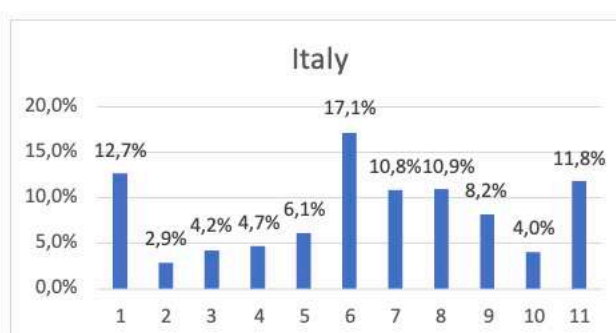
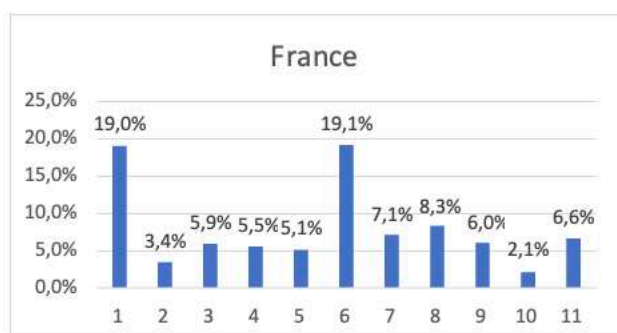
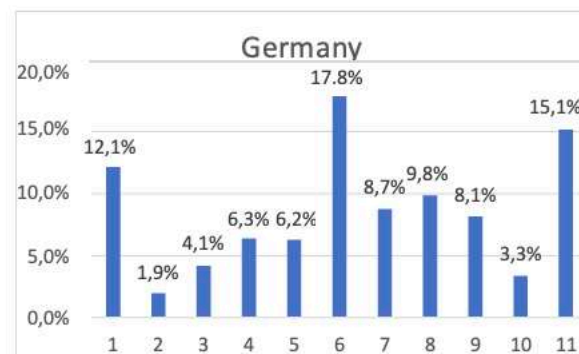
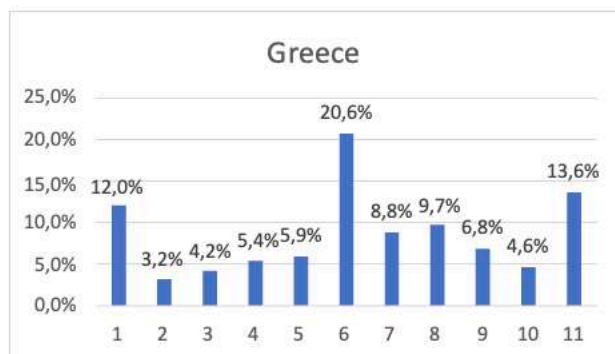
The analysis shows that the cohesion of political groups varies significantly, reflecting each group's peculiarities and goals. Groups with high cohesion may be more effective in decision-making and policy formation, while groups with low cohesion, such as the ESN, face challenges in internal cohesion and achieving common goals.

Finally, the white sphere in the Overall Chart presents the average of the own positions held by European citizens who participated in the survey (and not their opinion on national parties or political groups in the EP). In response to the question of whether they believe the integration process has gone too far or should be further strengthened, one-quarter of respondents are negatively disposed towards the achieved degree of deepening of the integration process, one-third are satisfied with the current situation, and finally, 35% favor further deepening. More specifically:

1. 25% believe integration has gone too far, expressing mainly anti-European positions (responses 0-3).
2. 34% express neutrality, stating that neither more nor less Europe is needed (4-6).
3. 35% believe integration should be further strengthened (responses 7-10).



These numbers vary from country to country, but these deviations are rather insignificant. Indicatively, presenting the detailed data for four countries (Greece, France, Germany, and Italy), citizens move, in general, to the same direction, although the case of France cannot go unnoticed. In France, a significantly smaller percentage of citizens are positive towards the prospect of further integration, and a correspondingly substantially higher percentage believe that integration has already gone too far.



Conclusions

The new five-year political cycle of the EU began with the European elections of June 2024, creating a new political landscape with several similarities to the previous period but also some significant differences. Although the main poles of influence in the EP remain the two prominent political groups of the European People's Party (EPP) and the Social Democrats (S&D), the strengthening of political forces that react to the prospect of further European integration is bound to have an impact on the content and intensity of political contestation. The two main axes of differentiation, namely political ideology and stance towards the EU, and the placement of EP's political groups along them, at least as perceived subjectively by their national voters, create 'natural' potential partners and allies. Although the political reality is undoubtedly much more complex, this study highlights specific characteristics of these political groups related to their ideological and political identity and degree of cohesion. Higher cohesion is shown by the traditional political forces of the EP and the newly formed group of "Patriots for Europe." In any case, the goal is to prevent political paralysis that would render the EU unable to respond to the coming years' significant geoeconomic and geopolitical challenges.

Notes

1 Academic and research institutes participating in the project comprise among others the University of Amsterdam, London School of Economics, GESIS Leibniz Institute, Newcastle University, University of Kent, and IE University.

2 For the results of the EP elections, see <https://results.elections.europa.eu/en/>. For the MEPs per member-state and political group, see <https://www.europarl.europa.eu/meps/en/search/table>.

The NSRF and the Recovery Fund in Greece, 2021-2027: the institutional dimension

Author:
George Andreou

February 2025



Περύληψη

- Κατά την τρέχουσα δεκαετία, οι αναπτυξιακές πολιτικές της Ελλάδας κατευθύνονται και υποστηρίζονται τόσο από την πολιτική συνοχής μέσω του Εταιρικού Συμφώνου Περιφερειακής Ανάπτυξης (ΕΣΠΑ) 2021-2027 όσο και από το Ταμείο Ανάκαμψης και Ανθεκτικότητας (ΤΑΑ) μέσω του Εθνικού Σχεδίου Ανάκαμψης και Ανθεκτικότητας «Ελλάδα 2.0».
- Η παράλληλη δράση των δύο αυτών προγραμματικών και χρηματοδοτικών εργαλείων αντιπροσωπεύει μεν μια πρωτοφανή αναπτυξιακή ευκαιρία για την Ελλάδα και τις Περιφέρειές της, εγείρει δε σημαντικά ζητήματα στρατηγικής, συντονισμού και διαχείρισης.
- Το παρόν κείμενο εστιάζεται στη μελέτη της θεσμικής αρχιτεκτονικής και των μηχανισμών διακυβέρνησης και υλοποίησης του ΕΣΠΑ και του ΤΑΑ κι επιχειρεί να διερευνήσει τις επιπτώσεις αυτών των θεσμικών διευθετήσεων για την άσκηση δημόσιας πολιτικής στην Ελλάδα.

Εισαγωγή

Κατά την τρέχουσα δεκαετία, οι αναπτυξιακές πολιτικές της Ελλάδας κατευθύνονται και υποστηρίζονται τόσο από την πολιτική συνοχής μέσω του Εταιρικού Συμφώνου Περιφερειακής Ανάπτυξης (ΕΣΠΑ) 2021-2027 όσο και από το Ταμείο Ανάκαμψης και Ανθεκτικότητας (ΤΑΑ) μέσω του Εθνικού Σχεδίου Ανάκαμψης και Ανθεκτικότητας «Ελλάδα 2.0». Η παράλληλη δράση των δύο αυτών προγραμματικών και χρηματοδοτικών εργαλείων αντιπροσωπεύει μεν μια πρωτοφανή αναπτυξιακή ευκαιρία για την Ελλάδα και τις Περιφέρειές της, εγείρει δε σημαντικά ζητήματα στρατηγικής, συντονισμού και διαχείρισης. Το παρόν κείμενο εστιάζεται στη μελέτη της θεσμικής αρχιτεκτονικής και των μηχανισμών διακυβέρνησης και υλοποίησης του ΕΣΠΑ και του ΤΑΑ κι επιχειρεί να διερευνήσει τις επιπτώσεις αυτών των θεσμικών διευθετήσεων για την άσκηση δημόσιας πολιτικής στην Ελλάδα.

Το Ευρωπαϊκό πλαίσιο διακυβέρνησης της πολιτικής συνοχής και του Ταμείου Ανάκαμψης και Ανθεκτικότητας

Η πολιτική συνοχής και το Ταμείο Ανάκαμψης και Ανθεκτικότητας (ΤΑΑ) εμφανίζουν σημαντικές διαφορές ως προς τη θεσμική τους οργάνωση. Όσον αφορά τον συνολικό καταμερισμό αρμοδιοτήτων μεταξύ των θεσμικών οργάνων της ΕΕ και των κρατών μελών, έχουμε να παρατηρήσουμε τα εξής:

Αφενός, οι δράσεις της πολιτικής συνοχής υλοποιούνται υπό ένα *καθεστώς επιμερισμένης διαχείρισης* (shared management). Η Ευρωπαϊκή Επιτροπή εγκρίνει τα προγράμματα που υποβάλλουν οι εθνικές αρχές, διασφαλίζοντας ότι αυτά αντικατοπτρίζουν τις προτεραιότητες της ΕΕ και τηρούν το νομικό της πλαίσιο. Ακολούθως, οι διοικήσεις των κρατών μελών επιλέγουν τα έργα προς χρηματοδότηση και είναι υπεύθυνες για την καθημερινή διαχείριση των προγραμμάτων. Οι πληρωμές βασίζονται στις επιλέξιμες δαπάνες και όχι στην απόδοση. Εκατοντάδες εθνικές και περιφερειακές αρχές στα κράτη μέλη συμμετέχουν στον προγραμματισμό, την εφαρμογή, την παρακολούθηση και τον έλεγχο των δράσεων της πολιτικής συνοχής μέσω τόσο εθνικών όσο και περιφερειακών προγραμμάτων. Οι δικαιούχοι των κονδυλίων της συνοχής είναι δημόσιοι ή ιδιωτικοί φορείς, οντότητες χωρίς νομική προσωπικότητα ή φυσικά πρόσωπα (European Parliament and Council 2021).

Αφετέρου, το ΤΑΑ λειτουργεί υπό *καθεστώς άμεσης διαχείρισης* (direct management). Τα κράτη μέλη εκπονούν Εθνικά Σχέδια Ανάκαμψης και Ανθεκτικότητας (ΕΣΑΑ) έπειτα από διαβούλευση με την Ευρωπαϊκή Επιτροπή. Τα σχέδια αυτά περιλαμβάνουν μια σειρά από ορόσημα και στόχους που σχετίζονται με την υλοποίηση επενδύσεων και μεταρρυθμίσεων.

Οι εκταμιεύσεις των πόρων του ΤΑΑ βασίζονται στην επίτευξη των ορόσημων και των στόχων και τα κράτη μέλη είναι οι τελικοί δικαιούχοι των σχετικών κονδυλίων. Με άλλα λόγια, προϋπόθεση για τις πληρωμές προς τα κράτη δεν είναι η πραγματοποίηση δαπανών (όπως στην περίπτωση της πολιτικής συνοχής) αλλά η επιτυχής ολοκλήρωση των σχετικών συμφωνηθέντων οροσήμων και στόχων που αναφέρονται στο εγκεκριμένο ΕΣΑΑ. Επομένως, το ΤΑΑ βασίζεται στις επιδόσεις και παρέχει κίνητρα και δυνατότητες για την εφαρμογή μεταρρυθμίσεων σε μεγαλύτερη κλίμακα από οποιοδήποτε άλλο πρόγραμμα της ΕΕ. Ταυτόχρονα, τα κράτη μέλη είναι υπεύθυνα για τη συμμόρφωση με τις βασικές αρχές της χρηστής δημοσιονομικής διαχείρισης. Σε κρατικό επίπεδο, μια επικεφαλής αρχή (ο «συντονιστής του ΤΑΑ») έχει τη συνολική ευθύνη και ενεργεί ως το μοναδικό σημείο επαφής για την Επιτροπή. Υπάρχει η δυνατότητα η υλοποίηση έργων να ανατεθεί στα εθνικά υπουργεία ή στις περιφερειακές αρχές, όμως οι φορείς αυτοί οφείλουν να λογοδοτούν στον συντονιστή (European Court of Auditors 2023: 24)

Σημαντικές διαφορές υφίστανται επίσης όσον αφορά τον καταμερισμό των εξουσιών και των αρμοδιοτήτων μεταξύ των θεσμικών οργάνων της ΕΕ. Ενώ στην περίπτωση της πολιτικής συνοχής η Επιτροπή επιμερίζεται την ευθύνη για τη διαχείριση των προγραμμάτων της πολιτικής συνοχής με τα κράτη μέλη, η κατάσταση είναι διαφορετική όσον αφορά το ΤΑΑ. Πριν από την έκδοση της απόφασης που επιτρέπει οποιασδήποτε εκταμίευση στο πλαίσιο του ΤΑΑ, η Επιτροπή οφείλει να υποβάλει την προκαταρκτική της αξιολόγηση και να λάβει υπόψη τη γνώμη της Οικονομικής και Δημοσιονομικής Επιτροπής του Συμβουλίου. Ακολούθως, μια επιτροπή εκπροσώπων των κρατών μελών εξετάζει την απόφαση της Επιτροπής και έχει τη δυνατότητα να την ανατρέψει με ειδική πλειοψηφία. Επιπλέον, υπάρχει μια διαφοροποίηση ως προς τις αρμοδιότητες πολιτικής του Ευρωπαϊκού Κοινοβουλίου: η εξουσία του Κοινοβουλίου να εγκρίνει τις ετήσιες δαπάνες του προϋπολογισμού της ΕΕ - σύμφωνα με την ορολογία της ΕΕ, να «χορηγεί απαλλαγή στην Επιτροπή» - ισχύει τόσο για την πολιτική συνοχής όσο και τις των επιχορηγήσεις του ΤΑΑ. Αυτή η απαλλαγή, ωστόσο, δεν καλύπτει τα δάνεια του ΤΑΑ (European Court of Auditors 2023: 24-25).

Όσον αφορά τις διαδικασίες διαχείρισης, ο προγραμματισμός του ΤΑΑ είναι σαφώς περισσότερο συγκεντρωτικός σε σχέση με αυτόν την πολιτική συνοχής. Όπως έχει ήδη αναφερθεί, η ενεργοποίηση του ΤΑΑ βασίζεται σε ένα ενιαίο έγγραφο προγραμματισμού για κάθε κράτος μέλος - το ΕΣΑΑ) - που εγκρίνεται από το Συμβούλιο. Κάθε ΕΣΑΑ περιγράφει λεπτομερώς τις επενδύσεις και τις μεταρρυθμίσεις που υποστηρίζονται από τις επιχορηγήσεις του ΤΑΑ και, κατά περίπτωση, από δάνεια. Αξιολογείται από την Επιτροπή, η οποία παρέχει πρόταση για εκτελεστική απόφαση του Συμβουλίου που με τη σειρά της ορίζει ένα δεσμευτικό σύνολο μέτρων, τα σχετικά ορόσημα και στόχους που πρέπει να επιτευχθούν, καθώς και τον αριθμό και το ποσό των δόσεων. Μόλις εγκριθεί η εκτελεστική απόφαση του Συμβουλίου, συμπληρώνεται από «λειτουργικές ρυθμίσεις» που αφορούν θέματα τεχνικής εφαρμογής, τις χρηματοδοτικές συμφωνίες στις οποίες βασίζονται οι δημοσιονομικές δεσμεύσεις και τις δανειακές συμβάσεις, εάν υπάρχουν (Bokhorst and Corti: 2). Από την άλλη πλευρά, στην περίπτωση της πολιτικής συνοχής, κάθε κράτος μέλος υπογράφει Σύμφωνο Εταιρικής Σχέσης με την Επιτροπή. Αυτό το έγγραφο καθορίζει τον στρατηγικό προσανατολισμό της χρηματοδότησης και τις ρυθμίσεις για τη χρήση της. Περιέχει επίσης λεπτομέρειες για τα Εθνικά και/ή τα Περιφερειακά Επιχειρησιακά Προγράμματα που πρόκειται να συγχρηματοδοτηθούν στην εκάστοτε χώρα ή η περιφέρεια. Η Επιτροπή εκδίδει εκτελεστικές πράξεις για την έγκριση τόσο του Συμφώνου Εταιρικής Σχέσης όσο και κάθε επιμέρους Προγράμματος. Τυχόν τροποποιήσεις στα Προγράμματα της πολιτικής συνοχής προϋποθέτουν την αξιολόγηση και την έγκριση της Επιτροπής, ενώ οι αναθεωρήσεις των ΕΣΑΑ προϋποθέτουν την αξιολόγηση της Επιτροπής και την έγκριση του Συμβουλίου (Andreou 2025: 104-105).

Τέλος, οφείλουμε να επισημάνουμε ότι η αρχή της εταιρικής σχέσης - μια από τις οργανωτικές αρχές της πολιτικής συνοχής - δεν ισχύει για το ΤΑΑ. Τα κράτη μέλη οφείλουν να εφαρμόζουν την αρχή της εταιρικής σχέσης κατά την εφαρμογή της πολιτικής συνοχής σύμφωνα με έναν Ευρωπαϊκό Κώδικα Δεοντολογίας. Ως εκ τούτου, οι δημόσιες αρχές σε περιφερειακό, τοπικό και αστικό επίπεδο, οι οργανώσεις της κοινωνίας των πολιτών, καθώς και οι οικονομικοί και κοινωνικοί εταίροι καλούνται να συμβάλουν τόσο στην κατάρτιση των Συμφωνιών Εταιρικής Σχέσης όσο και στην προετοιμασία, την εφαρμογή και την αξιολόγηση του κάθε Προγράμματος. Η διαδικασία που ακολουθείται στο πλαίσιο του ΤΑΑ είναι διαφορετική. Κατά την κατάρτιση των ΕΣΑΑ, οι εθνικές αρχές υποχρεούνται να συμβουλευούνται τις τοπικές και περιφερειακές αρχές, τους κοινωνικούς εταίρους, την κοινωνία των πολιτών και τις οργανώσεις νεολαίας μόνο στο βαθμό που αυτό απαιτείται από την εθνική νομοθεσία. Η διαδικασία διαβούλευσης που εφαρμόζεται ανά περίπτωση περιγράφεται στα ίδια τα ΕΣΑΑ (European Court of Auditors 2023: 29-31).

Η θεσμική αρχιτεκτονική του ΕΣΠΑ 2021-2027

Η συνολική ευθύνη για τη διακυβέρνηση του ΕΣΠΑ 2021-2027 είχε αρχικά εκχωρηθεί στο Υπουργείο Ανάπτυξης και Επενδύσεων (Ελληνική Δημοκρατία (2022)). Ωστόσο, από το 2023, η αρμοδιότητα αυτή μεταφέρθηκε στο νεοσυσταθέν Υπουργείο Εθνικής Οικονομίας και Οικονομικών. Το Σύστημα Διαχείρισης και Ελέγχου (ΣΔΕ) είναι κοινό για όλα τα Τομεακά και Περιφερειακά Προγράμματα του ΕΣΠΑ 2021-2027 (βλ. Πλαίσιο 1).

Πλαίσιο 1

Τα Προγράμματα του ΕΣΠΑ 2021-2027

Σύμφωνα με το Άρθρο 3 του Ν. 4414/22, το ΕΣΠΑ περιλαμβάνει εννέα Τομεακά Προγράμματα, δεκατρία Περιφερειακά Προγράμματα και δεκατρία Προγράμματα για τον Στόχο «Ευρωπαϊκή Εδαφική Συνεργασία» (INTERREG).

- Τα Τομεακά Προγράμματα είναι:

Α. Επτά Τομεακά Προγράμματα που λαμβάνουν χρηματοδοτική στήριξη από ένα ή περισσότερα από τα ακόλουθα Ταμεία: το Ευρωπαϊκό Ταμείο Περιφερειακής Ανάπτυξης (ΕΤΠΑ), το Ευρωπαϊκό Κοινωνικό Ταμείο+ (ΕΚΤ+) και το Ταμείο Συνοχής (ΤΣ), και είναι τα ακόλουθα:

1. «Ανθρώπινο Δυναμικό και Κοινωνική Συνοχή»,
2. «Ανταγωνιστικότητα»,
3. «Ψηφιακός Μετασχηματισμός»,
4. «Περιβάλλον και Κλιματική Αλλαγή»,
5. «Πολιτική Προστασία»,
6. «Μεταφορές»,
7. «Τεχνική Βοήθεια και Υποστήριξη Δικαιούχων»,

Β. Ένα Τομεακό Πρόγραμμα που λαμβάνει χρηματοδοτική στήριξη από το Ταμείο Δίκαιης Μετάβασης (ΤΔΜ), το οποίο ονομάζεται «Δίκαιη Αναπτυξιακή Μετάβαση», και ένα Τομεακό Πρόγραμμα που λαμβάνει χρηματοδοτική στήριξη από το Ευρωπαϊκό Ταμείο Θάλασσας, Αλιείας και Υδατοκαλλιέργειας (ΕΤΘΑΥ), το οποίο ονομάζεται «Αλιεία, Υδατοκαλλιέργεια και Θάλασσα».

- Τα Περιφερειακά Προγράμματα λαμβάνουν χρηματοδοτική στήριξη από το ΕΤΠΑ, το ΕΚΤ+ και το ΤΣ, και είναι τα: α) «Ανατολική Μακεδονία, Θράκη», β) «Κεντρική Μακεδονία», γ) «Θεσσαλία», δ) «Ήπειρος», ε) «Δυτική Ελλάδα», στ) «Δυτική Μακεδονία», ζ) «Στερεά Ελλάδα», η) «Πελοπόννησος», θ) «Ιόνια Νησιά», ι) «Βόρειο Αιγαίο», ια) «Κρήτη», ιβ) «Αττική», ιγ) «Νότιο Αιγαίο».

Τέλος, τα Προγράμματα INTERREG λαμβάνουν χρηματοδοτική στήριξη από το ΕΤΠΑ ή/και τους μηχανισμούς εξωτερικής χρηματοδότησης και είναι τα ακόλουθα: α) (Interreg VI-A) Greece-Bulgaria, β) (Interreg VI-A) Greece-Italy, γ) (Interreg VI-A) Greece-Cyprus, δ) (Interreg VI-A) IPA III CBC Greece-Albania, ε) (Interreg VI-A) IPA III CBC Greece-Republic of North Macedonia, στ) (Interreg VI-B) Euro Mediterranean 2021-2027 (EURO MED), ζ) (Interreg VI-B) Adriatic-Ionian, η) (Interreg VI-B) Interreg NEXT MED, θ) (Interreg VI-B) Interreg NEXT Black Sea Basin, ι) (Interreg VI-C) Interreg Europe, ια) (Interreg VI-C) Interact, ιβ) Urbact IV και ιγ) ESPON 2030 Cooperation Programme.

Πηγή: Ελληνική Δημοκρατία (2022: 2188)

Η ευθύνη για τον συνολικό σχεδιασμό και την επίβλεψη του ΣΔΕ ανήκει στην Εθνική Αρχή

Συντονισμού (ΕΑΣ) του Υπουργείου Εθνικής Οικονομίας και Οικονομικών. Αποστολή της ΕΑΣ είναι η άσκηση καθηκόντων συνδέσμου και η παροχή πληροφοριών στην Ευρωπαϊκή Επιτροπή, η εκπροσώπηση της χώρας συνολικά για το ΕΣΠΑ, ο συντονισμός των δραστηριοτήτων των Διαχειριστικών Αρχών και των άλλων σχετικών εμπλεκόμενων αρμόδιων αρχών και δομών, η παροχή κατευθύνσεων στους φορείς που εμπλέκονται στην υλοποίηση των πράξεων και η προώθηση της εφαρμογής του ενωσιακού και του εθνικού δικαίου (Ελληνική Δημοκρατία 2022: 2201).

Η Δομή του ΣΔΕ περιλαμβάνει τις Αρχές/ φορείς που αναλαμβάνουν τις αρμοδιότητες διαχείρισης, λογιστικής λειτουργίας και ελέγχου σύμφωνα με τις απαιτήσεις του Κανονισμού (ΕΕ) 2021/1060. Οι αρμόδιες Αρχές/ φορείς προσδιορίζονται στο Νόμο 4914/2022 (Ελληνική Δημοκρατία 2022) και είναι οι ακόλουθες:

- Η Διαχειριστική Αρχή (ΔΑ), η οποία ορίζεται για κάθε επιμέρους Τομεακό και Περιφερειακό Πρόγραμμα (βλ. Πλαίσιο 2)
- Η Λογιστική Αρχή - Ειδική Υπηρεσία «Αρχή Πιστοποίησης και Εξακρίβωσης Συγχρηματοδοτούμενων Προγραμμάτων» (εφεξής ΕΥΑΠ), η οποία ορίζεται για το σύνολο των Προγραμμάτων και υπάγεται στο Υπουργείο Εθνικής Οικονομίας και Οικονομικών
- Η Αρχή Ελέγχου (ΑΕ), η οποία ορίζεται για το σύνολο των Προγραμμάτων και υπάγεται επίσης στο Υπουργείο Εθνικής Οικονομίας και Οικονομικών
- Οι Ενδιάμεσοι Φορείς (ΕΦ), στους οποίους ανατίθενται συγκεκριμένα καθήκοντα της Διαχειριστικής Αρχής, υπό την ευθύνη της.

Πλαίσιο 2

Οι Διαχειριστικές Αρχές του ΕΣΠΑ 2021-2027

Για τη διαχείριση των είκοσι δύο Τομεακών και Περιφερειακών Προγραμμάτων του ΕΣΠΑ 2021-2027 έχουν οριστεί είκοσι μία Διαχειριστικές Αρχές. Σύμφωνα με το Άρθρο 7 του ν. 4914/2022, όλες οι ΔΑ είναι Ειδικές Υπηρεσίες (Δημόσιες Εθνικές και Περιφερειακές Αρχές). Οι ΔΑ των Τομεακών Προγραμμάτων του ΕΣΠΑ είναι συνολικά εννέα, οι επτά πρώτες από τις οποίες, από το 2023, υπάγονται στο Υπουργείο Εθνικής Οικονομίας και Οικονομικών¹:

- Ειδική Υπηρεσία Διαχείρισης Προγράμματος «Ανθρώπινο Δυναμικό και Κοινωνική Συνοχή»
- Ειδική Υπηρεσία Διαχείρισης Προγράμματος «Ανταγωνιστικότητα»
- Ειδική Υπηρεσία Διαχείρισης Προγραμμάτων «Περιβάλλον και Κλιματική Αλλαγή» και «Πολιτική Προστασία»
- Ειδική Υπηρεσία Διαχείρισης Προγράμματος «Μεταφορές»,
- η Ειδική Υπηρεσία Δίκαιης Αναπτυξιακής Μετάβασης
- Ειδική Υπηρεσία Διαχείρισης Προγράμματος «Τεχνική Βοήθεια και Υποστήριξη Δικαιούχων»
- Η Ειδική Υπηρεσία Διαχείρισης Προγράμματος «Ψηφιακός Μετασχηματισμός» υπάγεται στον Υπουργό Ψηφιακής Διακυβέρνησης.
- Η Ειδική Υπηρεσία Διαχείρισης Προγράμματος «Αλιεία, Υδατοκαλλιέργεια και Θάλασσα» υπάγεται στο Υπουργείο Αγροτικής Ανάπτυξης και Τροφίμων (Υπουργείο Ανάπτυξης και Επενδύσεων 2023: 4).

Από την άλλη πλευρά, οι ΔΑ των δεκατριών Περιφερειακών Προγραμμάτων (μία για τη διαχείριση κάθε Προγράμματος) υπάγονται διοικητικά στον οικείο Περιφερειάρχη Τέλος, η διαχείριση και η παρακολούθηση των Προγραμμάτων INTERREG ασκείται από την Ειδική Υπηρεσία INTERREG 2021 - 2027, η οποία υπάγεται επίσης στο Υπουργείο Εθνικής Οικονομίας και Οικονομικών.

Τέλος, καίριο ρόλο στη διακυβέρνηση του ΕΣΠΑ 2021-2027 (οφείλουν να) διαδραματίζουν οι *επιτελικές δομές των υπουργείων*. Οι υπηρεσίες αυτές συστάθηκαν για πρώτη φορά εν όψει του ΕΣΠΑ 2014-2020 - οπότε και κλήθηκαν να λειτουργήσουν ως σύνδεσμος ανάμεσα στις τομεακές πολιτικές της χώρας και τα Προγράμματα του ΕΣΠΑ - και, κατά την τρέχουσα περίοδο, απέκτησαν περισσότερες αρμοδιότητες. Αποστολή της κάθε επιτελικής δομής είναι η υποστήριξη του οικείου Υπουργείου¹ και των φορέων που εποπτεύονται από αυτό στην αποτύπωση, ιεράρχηση και εξειδίκευση των αναγκών στους τομείς πολιτικής αρμοδιότητας του Υπουργείου, καθώς και η ενίσχυση της διοικητικής τους ικανότητας σε σχέση με τα Προγράμματα 2021-2027. Οι επιτελικές δομές δύνανται επίσης να ασκούν τον ρόλο του *φορέα υλοποίησης* δράσεων ή έργων που έχουν περιληφθεί στο Εθνικό Σχέδιο Ανάκαμψης και Ανθεκτικότητας ή τον ρόλο της *αρμόδιας Υπηρεσίας του Υπουργείου ευθύνης* για τον συντονισμό και την παρακολούθηση των σχετικών δράσεων και έργων αρμοδιότητας του Υπουργείου (Ελληνική Δημοκρατία 2022: 2205).

Η θεσμική αρχιτεκτονική του Εθνικού Σχεδίου Ανάκαμψης και Ανθεκτικότητας Ελλάδα 2.0

Το Εθνικό Σχέδιο Ανάκαμψης και Ανθεκτικότητας «Ελλάδα 2.0» (ΕΣΑΑ) εγκρίθηκε στις 13 Ιουλίου 2021 με την υπ' αριθμ. 10152/21 Απόφαση του Συμβουλίου της Ευρωπαϊκής Ένωσης². Το ΕΣΑΑ περιλαμβάνει 105 επενδύσεις και 77 μεταρρυθμίσεις και συγκεντρώνει χρηματοδοτικούς πόρους ύψους 35,95 δισ. ευρώ (18,22 δισ. ευρώ σε επιχορηγήσεις και 17,73 δισ. ευρώ σε δάνεια). Οι υπό προγραμματισμό μεταρρυθμίσεις κατανέμονται στους ακόλουθους 4 πυλώνες, συμπεριλαμβανομένου του νέου κεφαλαίου REPowerEU: α) Πράσινη Μετάβαση, β) Ψηφιακή Μετάβαση, γ) Απασχόληση, δ) Δεξιότητες και Κοινωνική Συνοχή και δ) Ιδιωτικές επενδύσεις και μετασχηματισμός της οικονομίας.

Όπως επισημαίνεται στο ίδιο το ΕΣΑΑ, ο μοναδικός χαρακτήρας και το μέγεθος του Ταμείου Ανάκαμψης και Ανθεκτικότητας κατέστησε αναγκαία την θέσπιση ενός ιδιαίτερου Συστήματος Διαχείρισης και Ελέγχου (ΣΔΕ). Οι κύριοι στόχοι του ΣΔΕ είναι:

- να διασφαλίσει ότι η υλοποίηση των έργων ευθυγραμμίζεται με το ΕΣΑΑ
- να διασφαλίσει ότι η υλοποίηση των έργων συμμορφώνεται με το εθνικό και το ενωσιακό ρυθμιστικό πλαίσιο και ότι αποφεύγονται περιπτώσεις σύγκρουσης συμφερόντων, διαφθοράς, απάτης και διπλής χρηματοδότησης
- να παρέχει το πλαίσιο για την ενεργό παρακολούθηση της υλοποίησης των έργων, και τον τυχόν εντοπισμό περιπτώσεων καθυστερήσεων
- να παρέχει το πλαίσιο για τον έλεγχο των έργων και των Δικαιούχων/Φορέων Υλοποίησης
- να επιβεβαιώσει την αποδοτική και αποτελεσματική χρήση των κονδυλίων
- να γνωστοποιεί στην Ευρωπαϊκή Επιτροπή την επιτυχή ολοκλήρωση των συμφωνημένων οροσήμων και στόχων Ελληνική Δημοκρατία (2021α: 782).

Στο επίκεντρο του ΣΔΕ βρίσκεται η Ειδική Υπηρεσία Συντονισμού του Ταμείου Ανάκαμψης (ΕΥΣΤΑ), μία νέα υπηρεσία υπό τον Υπουργό Οικονομίας και Οικονομικών³ η οποία έχει είναι επιφορτισμένη με τον συνολικό συντονισμό και παρακολούθηση του ΕΣΑΑ και αποτελεί το μοναδικό σημείο επαφής μεταξύ των ελληνικών αρχών και της Ευρωπαϊκής Επιτροπής (βλ. Πλαίσιο 3).

Πλαίσιο 3:

Οι αρμοδιότητες της Ειδικής Υπηρεσίας Συντονισμού του Ταμείου Ανάκαμψης (ΕΥΣΤΑ)

Η ΕΥΣΤΑ ασκεί τα ακόλουθα καθήκοντα:

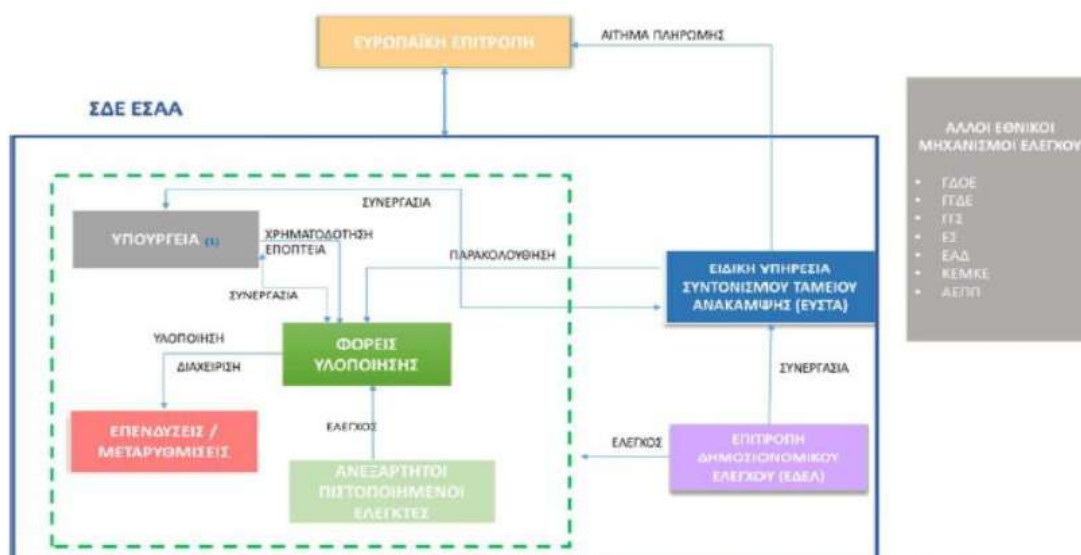
- Υποστηρίζει και συντονίζει την προετοιμασία και υποβολή του ΕΣΑΑ (και οποιωνδήποτε αναθεωρήσεών του) στην Ευρωπαϊκή Επιτροπή.
- Σχεδιάζει και τροποποιεί το ΣΔΕ για την εφαρμογή του ΕΣΑΑ.
- Εκδίδει την Απόφαση Έγκρισης των έργων και επαληθεύει ότι δεν υπάρχει σύγκρουση συμφερόντων και καμία δυτική χρηματοδότηση στο επίπεδο της έγκρισης των έργων.
- Επαληθεύει ότι η υλοποίηση των έργων είναι σύμφωνη με το εγκεκριμένο ΕΣΑΑ.
- Παρακολουθεί την πρόοδο των έργων, με βάση τα ορόσημα και τους στόχους που έχουν τεθεί, για κάθε άξονα και / ή μεταρρύθμιση και επένδυση, και επαληθεύει την επίτευξή τους.
- Αξιολογεί τις εκθέσεις των ανεξάρτητων πιστοποιημένων ελεγκτών που θα χρησιμοποιηθούν από τους φορείς υλοποίησης σχετικά με την επίτευξη των ορόσημων / στόχων που έχουν ανατεθεί σε αιτήματα χρηματοδότησης του ΤΑΑ και κατά την ολοκλήρωση των ίδιων των έργων.
- Εισηγείται στον Υπουργό Οικονομικών και στα αρμόδια κυβερνητικά όργανα τρόπους αντιμετώπισης των προβλημάτων που ανακύπτουν κατά την εκτέλεση των έργων του ΕΣΑΑ, καθώς και αναθεωρήσεις και τροποποιήσεις του ΕΣΑΑ.
- Συνεργάζεται με την Επιτροπή Δημοσιονομικού Ελέγχου (ΕΔΕΛ) σχετικά με τους ελέγχους που πραγματοποιήθηκαν για την επίτευξη ορόσημων και στόχων του ΕΣΑΑ και την διασφάλιση της αποτελεσματικής λειτουργίας του ΣΔΕ.
- Εκπροσωπεί την Ελλάδα στα αρμόδια όργανα της ΕΕ για το ΤΑΑ και ενεργεί ως σημείο επαφής με τις αρμόδιες διευθύνσεις της ΕΕ.
- Συνεργάζεται με την Ειδική Υπηρεσία Ολοκληρωμένου Πληροφοριακού Συστήματος της Γενικής Γραμματείας Δημοσίων Επενδύσεων και ΕΣΠΑ για την ανάπτυξη του Πληροφοριακού Συστήματος του ΤΑΑ.
- Συντάσσει εκθέσεις υλοποίησης των προγραμμάτων και έργων του ΕΣΑΑ

Πηγή: Ελληνική Δημοκρατία (2021^α: 785-786).

Εκτός από την ΕΥΣΤΑ, το ΣΔΕ περιλαμβάνει επίσης:

- τα εμπλεκόμενα υπουργεία, τα οποία συντάσσουν και υποβάλουν προτάσεις για μεταρρυθμίσεις και επενδυτικά σχέδια που χρηματοδοτούνται από το ΤΑΑ
- τους φορείς υλοποίησης, οι οποίοι αναλαμβάνουν τη διαχείριση και την εφαρμογή των εγκεκριμένων έργων
- την Επιτροπή Δημοσιονομικού Ελέγχου (ΕΔΕΛ), η οποία διενεργεί τους ελέγχους προκειμένου να επαληθεύεται η επίτευξη των ορόσημων/ στόχων και άρα η αποτελεσματική λειτουργία του ΣΔΕ (Ελληνική Δημοκρατία (2021^α: 782).

Σχήμα 1: η δομή του Συστήματος Διαχείρισης και Ελέγχου του σχεδίου «Ελλάδα 2.0»



Πηγή: Ελληνική Δημοκρατία (2021α: 783)

Αναλυτικότερα, όπως προβλέπει το ΕΣΑΑ, οι φορείς υλοποίησης των έργων του ΕΣΑΑ ορίζονται από τα αρμόδια Υπουργεία. Για το σκοπό αυτό, κάθε Υπουργείο κλήθηκε να προετοιμάσει και να υποβάλει στην ΕΥΣΤΑ αναλυτικό σχέδιο δράσης (masterplan) για κάθε έργο που εμπίπτει στην αρμοδιότητά του. Ακολούθως, έπειτα από την έγκριση του ΕΣΑΑ από την ΕΕ, ο κάθε φορέας υλοποίησης συμπληρώνει και υποβάλει στο αρμόδιο Υπουργείο - και, κατά συνέπεια, και στην ΕΥΣΤΑ μέσω του Πληροφοριακού Συστήματος του ΤΑΑ - το οποίο προβλέφθηκε ότι θα αναπτυχθεί στην ίδια πλατφόρμα με το Πληροφορικό Σύστημα του ΕΣΠΑ - το τεχνικό δελτίο του έργου⁴. Τα τεχνικά δελτία εγκρίνονται και υπογράφονται από τον αρμόδιο Υπουργό και στη συνέχεια αξιολογούνται από την ΕΥΣΤΑ, η οποία εκδίδει την σχετική απόφαση έγκρισης που αποτελεί και αυτοδίκαιη εγγραφή στο Πρόγραμμα Δημοσίων Επενδύσεων (Ελληνική Δημοκρατία 2021α: 794).

Κατά τη διάρκεια της υλοποίησης των έργων, η ΕΥΣΤΑ, σε συνεργασία με το Υπουργείο ευθύνης, επιβλέπει στενά τη διοικητική ικανότητα όλων των εμπλεκόμενων. Επιπλέον, καθ' όλη τη διάρκεια του κύκλου ζωής των δράσεων/έργων, οι φορείς υλοποίησης δεσμεύονται να ενημερώνουν συστηματικά την ΕΥΣΤΑ σχετικά με την πρόοδο που σημειώνεται στην επίτευξη των οροσήμων και των στόχων σύμφωνα με τη μεθοδολογία που παρέχει η ΕΕ. Από την πλευρά της, η ΕΥΣΤΑ είναι επιφορτισμένη να διασφαλίζει την αποτελεσματική παρακολούθηση του ΕΣΑΑ (συμπεριλαμβανομένων του προβλεπόμενου χρονοδιαγράμματος, οροσήμων και στόχων και των σχετικών δεικτών) μέσω του Πληροφορικού Συστήματος του ΤΑΑ (Ελληνική Δημοκρατία 2021α: 795).

Προβλέπεται επίσης ένα πλέγμα διαδικασιών επιτήρησης και ελέγχων, στο πλαίσιο των οποίων, πρώτον, οι δαπάνες που καταχωρούνται στο ΠΣ του ΤΑΑ από τους φορείς υλοποίησης των έργων κι επαληθεύονται από τα αρμόδια υπουργεία και την ΕΥΣΤΑ και, δεύτερον, η ΕΔΕΛ διενεργεί ελέγχους σε εξαμηνιαία, ετήσια και 18μηνη βάση προκειμένου να επαληθεύσει ότι επιτυγχάνονται τα προβλεπόμενα ορόσημα και στόχοι, τηρούνται οι κανόνες αποτελεσματικής λειτουργίας του ΣΔΕ και διασφαλίζεται η νομιμότητα και η κανονικότητα των δαπανών των έργων (Ελληνική Δημοκρατία 2021α: 795-796). Τέλος, όλα τα δεδομένα που αφορούν την υλοποίηση των έργων θα καταχωρούνται στο ΠΣ του ΤΑΑ, το οποίο είναι το κύριο εργαλείο για τη διαχείριση και τον έλεγχο των έργων και για τη διασφάλιση της αξιοπιστίας των δεδομένων και της διαφάνειας⁵. Όλα τα εμπλεκόμενα όργανα της ΕΕ θα έχουν πρόσβαση στο ΠΣ του ΤΑΑ (Ελληνική Δημοκρατία 2021α: 796, 819).

Συζήτηση και συμπεράσματα

Με μια πρώτη ματιά, το ΕΣΠΑ και το ΤΑΑ αντιπροσωπεύουν δύο όψεις του ίδιου νομίσματος, καθώς αμφότερα χρηματοδοτούν επενδύσεις στα κράτη μέλη της ΕΕ, έχουν ευρύτερες μακροοικονομικούς επιδιώξεις και προωθούν στην πράσινη και ψηφιακή μετάβαση της ΕΕ. Ωστόσο, ο σχεδιασμός τους είναι εγγενώς διαφορετικός, αντικατοπτρίζοντας διαφορετικές στοχεύσεις: ενώ ο πρωταρχικός στόχος της πολιτικής συνοχής και των ΕΣΠΑ είναι η προώθηση της οικονομικής σύγκλισης στην επικράτεια της ΕΕ, το ΤΑΑ επιχειρεί να ανταποκριθεί στις οικονομικές και κοινωνικές προκλήσεις που έθεσε ο COVID-19, καθώς και στις οικονομικές και γεωπολιτικές ανησυχίες που εγείρει ο πόλεμος στην Ουκρανία και η παγκόσμια ενεργειακή κρίση. Επιπλέον, η εναρμόνιση των βασικών στόχων της πολιτικής συνοχής και του ΤΑΑ με την πράσινη, ψηφιακή και ενεργειακή ατζέντα της ΕΕ αποτελεί πρόκληση τόσο για το ευρωπαϊκό όσο και το εθνικό επίπεδο πολιτικής (Andreou 2025: 109). Τέλος, όπως αναλύθηκε στις προηγούμενες ενότητες, το ΕΣΠΑ και το ΕΣΑΑ λειτουργούν με βάση διακριτούς κανόνες και προϋποθέσεις, βασίζονται σε διαφορετικές θεσμικές δομές και ακολουθούν διαφορετικές διαδικασίες και μηχανισμούς, γεγονός που εγείρει το ζήτημα της μεταξύ τους συμβατότητας και σε θεσμικούς και οργανωτικούς όρους.

Θεωρητικά, ο σχεδιασμός και η θεσμική οργάνωση του ΕΣΠΑ 2012-2027 και του ΕΣΑΑ διασφαλίζουν ότι οι επενδύσεις και οι μεταρρυθμίσεις που αυτά χρηματοδοτούν έχουν συμπληρωματικά χαρακτηριστικά κι εντάσσονται σε ένα συνεκτικό πλαίσιο εθνικής αναπτυξιακής πολιτικής (Ελληνική Δημοκρατία (2021β: 40). Είναι αξιοσημείωτο ότι τόσο το ευρωπαϊκό όσο και το εθνικό θεσμικό πλαίσιο αποδίδουν ιδιαίτερη έμφαση στην *αποφυγή της διπλής χρηματοδότησης* των υποστηριζόμενων έργων ή δράσεων. Οργανωτικά και θεσμικά, η μέριμνα αυτή αντανακλάται στη δομή και τη λειτουργία των ΠΣ του ΕΣΠΑ και του ΤΑΑ. Πιο συγκεκριμένα, όπως προβλέπεται από το ΕΣΑΑ, η αποφυγή, η ανίχνευση και η πρόληψη της διπλής χρηματοδότησης θα διασφαλίζεται σε όλα τα στάδια του κύκλου ζωής των εντασσόμενων έργων (Ελληνική Δημοκρατία 2021α: 808). Υπάρχουν ενδείξεις, ωστόσο, ότι το εν λόγω σύστημα (και συνολικά όλα τα συστήματα που αναπτύχθηκαν και εφαρμόζονται από την Επιτροπή και τα κράτη μέλη) δεν είναι ακόμα επαρκές ώστε να μετριάσει αποτελεσματικά τον κίνδυνο διπλής χρηματοδότησης (Ευρωπαϊκό Ελεγκτικό Συνέδριο 2024). Σε κάθε

περίπτωση, το ζήτημα των συνεργειών ανάμεσα στο ΕΣΠΑ και στο ΕΣΑΑ είναι πολύ πιο σύνθετο από το πρόβλημα της διπλής χρηματοδότησης. Πρώτον, όσον αφορά την στρατηγική, διαπιστώνεται σημαντική αλληλοεπικάλυψη ως προς τους στόχους του ΕΣΠΑ και του ΕΣΑΑ (ένα φαινόμενο που αναπαράγει την αλληλοεπικάλυψη στόχων που παρατηρείται μεταξύ της πολιτικής συνοχής και του ΤΑΑ στο επίπεδο της Ευρωπαϊκής Ένωσης. Δεύτερον, όσον αφορά τον προγραμματισμό, διαπιστώνεται μια σαφής διαφορά φιλοσοφίας, καθώς το ΕΣΠΑ επιχειρεί να συνδυάσει μια τομεακή αναπτυξιακή λογική με μια λογική περιφερειακής ανάπτυξης, ενώ το ΕΣΑΑ ακολουθεί μια αμιγώς τομεακή λογική. Τρίτον, όσον αφορά τους θεσμούς, τη διακυβέρνηση και τη διαχείριση, καθίσταται σαφές ότι η Ελλάδα έχει αναπτύξει δύο διακριτές δομές διαχείρισης και ελέγχου, οι οποίες λειτουργούν παράλληλα - και, σε ορισμένες περιπτώσεις, ανταγωνιστικά - ακολουθώντας διαφορετικούς κανόνες, διαδικασίες και χρονοδιαγράμματα.

Συγκρίνοντας τα ΣΔΕ του ΕΣΠΑ και του ΕΣΑΑ, διαπιστώνουμε κάποιες ομοιότητες αλλά και πολλές διαφορές. Από τη μία πλευρά, και τα δύο συστήματα διέπονται από συγκεντρωτισμό και ιεραρχική λογική, γεγονός που αντανάκλαται στην ηγετική θέση που κατέχουν οι δύο αρχές συντονισμού - ΕΣΑ και ΕΣΤΑ αντίστοιχα - αλλά και στο ότι και οι δύο αυτές υπηρεσίες υπάγονται στον Υπουργό Εθνικής Οικονομίας και Οικονομικών. Από την άλλη πλευρά, η σύνθεση των δύο συστημάτων είναι πολύ διαφορετική, ενώ η λειτουργία τους διέπεται από πολύ διαφορετικούς κανόνες και διαδικασίες. Οι περισσότερες από τις παρατηρούμενες διαφορές θα πρέπει να αποδοθούν στο γεγονός ότι τα δύο ΣΔΕ θεμελιώνονται σε διαφορετικούς ενωσιακούς κανόνες. Από τη μία πλευρά, η πολιτική συνοχής εξακολουθεί να αποσκοπεί στην επίτευξη δια-περιφερειακής σύγκλισης και να αποδίδει έμφαση στην προώθηση της πολυεπίπεδης διακυβέρνησης και της εταιρικής σχέσης - αν και, κατά τις τρεις τελευταίες προγραμματικές περιόδους, η έμφαση μετατοπίζεται σταδιακά προς την επίτευξη θεματικών στόχων και την υποβάθμιση της εδαφικής και της συμμετοχικής διάστασης. Ως εκ τούτου, το ΣΔΕ του ΕΣΠΑ είναι περισσότερο πολυεπίπεδο και συμμετοχικό από το ΣΔΕ του ΤΑΑ - αν και, στην πράξη ο ρόλος των υποεθνικών και των μη κρατικών δρώντων είναι αρκετά περιορισμένος. Από την άλλη πλευρά, το ΤΑΑ θεμελιώνεται σε μία αμιγώς τομεακή και κρατικοκεντρική λογική η οποία εστιάζεται στην επίτευξη (εθνικών) μεταρρυθμίσεων και παρέχει στις εθνικές κυβερνήσεις την ευχέρεια να διαμορφώσουν τα ΣΔΕ τους σύμφωνα με τις δικές τους προτιμήσεις και παραδόσεις. Κατά συνέπεια, το Ελληνικό ΣΔΕ του ΕΣΑΑ είναι απολύτως συγκεντρωτικό και περιλαμβάνει αποκλειστικά το κεντρικό επίπεδο διακυβέρνησης - τα Υπουργεία και τις υπηρεσίες τους.

Θα μπορούσε κανείς να ισχυριστεί ότι η συγκεντρωτική λογική του ΕΣΑΑ αποτελεί πλεονέκτημα για ένα πολιτικο-διοικητικό σύστημα που είναι εγγενώς συγκεντρωτικό και ιεραρχικό. Υπό την ίδια οπτική γωνία, η εστίαση του ΕΣΑΑ στην ενδυνάμωση της ικανότητας σχεδιασμού και υλοποίησης πολιτικής των Υπουργείων προσιδιάζει καλύτερα στις ιδιαιτερότητες του εθνικού συστήματος διακυβέρνησης από τη λογική της πολυεπίπεδης διακυβέρνησης που πρεσβεύει το ΕΣΠΑ. Ωστόσο, οι μέχρι σήμερα εξελίξεις δεν δικαιώνουν αυτή την άποψη. Σύμφωνα με την τελευταία Έκθεση του Ελεγκτικού Συνεδρίου για την υλοποίηση των δράσεων του ΤΑΑ, το θεσμικό πλαίσιο και οι διαδικασίες παρακολούθησης των έργων του ΕΣΑΑ διέπονται από ανεπαρκή χρονοδιαγράμματα, πλημμελή εφαρμογή των διαδικασιών παρακολούθησης της ωρίμανσης και της υλοποίησης των έργων, υποστελέχωση των φορέων υλοποίησης (με αποτέλεσμα την προσφυγή σε συμβάσεις με ιδιώτες αναδόχους), περιορισμένη διασυνδεσιμότητα των πληροφοριακών συστημάτων του Ταμείου με άλλα πληροφοριακά συστήματα, καθώς και καθυστερήσεις στην ωρίμανση και υλοποίηση των έργων (Ελεγκτικό Συνέδριο 2025). Τα ευρήματα αυτά επιβεβαιώνουν τη θέση ότι η χαμηλή ικανότητα διακυβέρνησης και η χαμηλή διοικητική ικανότητα έχουν ενδημικό χαρακτήρα στο ελληνικό πολιτικο-διοικητικό σύστημα και ότι, όπως και στην περίπτωση του ΕΣΠΑ, η προστιθέμενη αξία των νέων αναπτυξιακών πολιτικών που εκπορεύονται από την ΕΕ περιορίζεται σημαντικά από αυτόν το «συστημικό παράγοντα».

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Σημειώσεις

1 Οι Ειδικές Υπηρεσίες που ασκούν αρμοδιότητες επιτελικής δομής σύμφωνα με το άρθρο 22, είναι οι εξής: α) Επιτελική Δομή ΕΣΠΑ Υπουργείου Εξωτερικών, β) Επιτελική Δομή ΕΣΠΑ Υπουργείου Παιδείας και Θρησκευμάτων, γ) Επιτελική Δομή ΕΣΠΑ Υπουργείου Εργασίας και Κοινωνικών Υποθέσεων, δ) Επιτελική Δομή ΕΣΠΑ Υπουργείου Υγείας, ε) Επιτελική Δομή ΕΣΠΑ Υπουργείου Περιβάλλοντος και Ενέργειας, στ) Επιτελική Δομή ΕΣΠΑ Υπουργείου Πολιτισμού και Αθλητισμού, ζ) Επιτελική Δομή ΕΣΠΑ Υπουργείου Δικαιοσύνης, η) Επιτελική Δομή ΕΣΠΑ Υπουργείου Υποδομών και Μεταφορών, θ) Επιτελική Δομή ΕΣΠΑ Υπουργείου Ναυτιλίας και Νησιωτικής Πολιτικής, ι) Επιτελική Δομή ΕΣΠΑ Υπουργείου Τουρισμού, ια) Επιτελική Δομή ΕΣΠΑ Υπουργείου Κλιματικής Κρίσης και Πολιτικής Προστασίας. Αρμοδιότητες Επιτελικής Δομής ασκεί και η Ειδική Υπηρεσία Διαχείρισης και Εφαρμογής του Υπουργείου Εσωτερικών (Ελληνική Δημοκρατία 2022: 2205).

2 Ακολούθως το ΕΣΑΑ αναθεωρήθηκε με τις υπ' αριθμ. 15831/23, 11858/24 και 17055/24 αποφάσεις του Συμβουλίου.

3 Η ΕΥΣΤΑ είναι αυτοτελής δημόσια υπηρεσία υπό τον Υπουργό Οικονομίας και Οικονομικών (από το 2023). Συστάθηκε τον Οκτώβριο του 2020 με τον Νόμο 4738/2020 και πρόκειται καταργηθεί αυτοδικαίως την 31η.3.2027 (Ελληνική Δημοκρατία 2020) - δηλαδή μόλις ολοκληρωθεί το έργο του ΤΑΑ.

4 Κάθε τεχνικό δελτίο περιλαμβάνει όλα τα δεδομένα που σχετίζονται με κάθε έργο (όπως ο πυλώνας στον οποίο αυτό εμπίπτει, το είδος δράσης που αφορά, τα ορόσημα και οι στόχοι στους οποίους οφείλει να συνεισφέρει, το προβλεπόμενο χρονοδιάγραμμα), καθώς και τη δήλωση των φορέων υλοποίησης ότι θα συμμορφωθούν με τους εθνικούς και ενωσιακούς κανόνες και θα εκπληρώσουν τις υποχρεώσεις τους.

5 Όλα τα δεδομένα που σχετίζονται με τις αποφάσεις έγκρισης των έργων, τις διαδικασίες παρακολούθησης, την καταχώρηση των δαπανών και τις πληρωμές τους, τα αποτελέσματα των επαληθεύσεων των αρμόδιων φορέων, καθώς και τα αποτελέσματα των ελέγχων της ΕΔΕΛ, θα καταχωρούνται στο ΠΣ του ΤΑΑ και όλα τα έγγραφα και τα έντυπα θα διατηρηθούν σε αυτό.

A deep dive in the White Paper on the Future of European Defence

Authors:

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April 2025



The White Paper on the Future of European Defence, released in March 2025, represents a landmark initiative by the European Commission to articulate a cohesive vision for strengthening the EU's defence posture amid mounting geopolitical instability. Acting as a framework for the ReArm Europe plan, the document proposes mobilising hundreds of billions of EUR in defence investments, making use of national and EU resources.

The ReArm Europe Plan and the White Paper clearly succeed in politically signalling the EU's renewed commitment to defence investment and military readiness. However, despite their rhetorical strength, four major concerns could undermine their transformative potential:

1. **Coordination gaps:** Without a robust coordination mechanism, national funds may be allocated to less pressing areas and may serve other - national and/or domestic - objectives and interests. In the meantime, the Union will not achieve effectiveness and efficiency unless it focuses on standardisation and interoperability.
2. **Financial markets' sensitivity:** While the activation of the national escape clause offers fiscal leeway, it is unclear how the financial markets will react to increased national debts. Alternative instruments, such as the Defence Eurobonds or the European Defence Mechanism, could be examined.
3. **Creative ambiguity:** The Proposal for a SAFE Regulation includes references presented vaguely enough to allow for multiple interpretations and thus avoid frictions. In view of the negotiations in the Council, the issue of a third country's participation in a procurement consortium must be further elaborated and clarified.
4. **Democratic legitimacy and parliamentary oversight:** Article 122 TFEU sidesteps the European Parliament, despite the latter's willingness to further support the EU defence initiatives. Without adequate parliamentary involvement, defence investments risk alienating public opinion in a policy area which requires broad societal consensus.

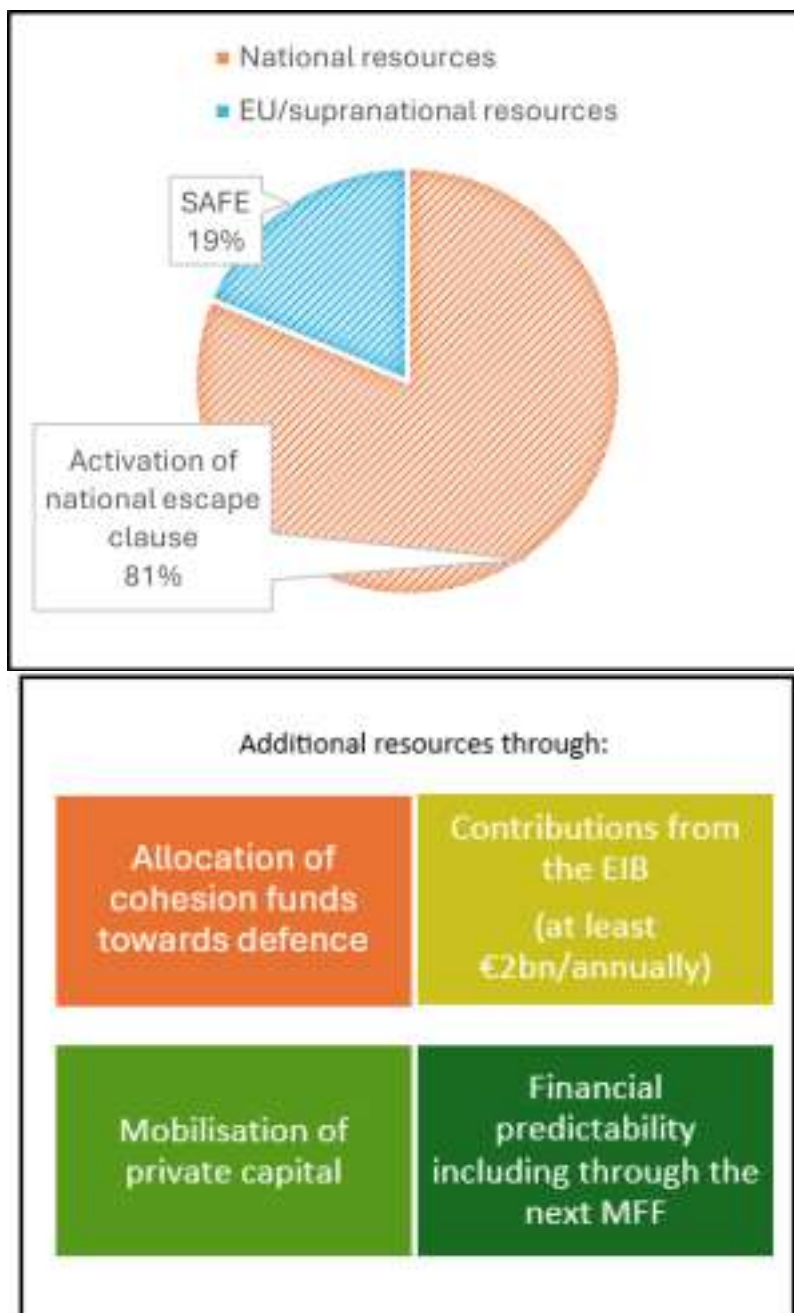
All the aforementioned shortcomings reflect a deeper structural issue: the absence of a common threat perception and a truly common foreign and security policy. Without a coherent strategic vision at the EU level, member-states remain inclined to prioritise national over collective objectives and interests.

Introduction

In response to the new geopolitical and geoeconomic realities - including but not limited to the protracted Russian war on Ukraine and the Trump 2.0 administration - and following the earlier announcement of the ReArm Europe Plan, the White Paper on the Future of European Defence was published in March 2025. The White Paper outlines the path to enhanced EU defence capabilities and aims to mobilise hundreds of billions of EUR, detailing measures to finance and strengthen the EU's military readiness.

The White Paper features well-intentioned objectives and its communication strategy was well orchestrated. It does provide answers to two key questions: first, where the money will come from and second, in what defence capabilities the EU is going to invest. Starting from the former, in the best-case scenario, national resources up to €650 billion will be mobilised through the activation of the national escape clause of the [Stability and Growth Pact](#) (SGP), which defines the fiscal governance framework for the EU member-states and sets rules for constraining national government deficit and debt. In essence, this clause will allow member-states to accommodate additional defence spending. The €650 billion will be topped by EU resources of up to €150 billion that will be gathered through the common issuance of bonds, as envisaged by the new SAFE instrument. In addition to these €800 billion, the White Paper proposes four additional -but rather vague and not quantified- ways to step up defence spending: a) redirecting existing EU funds towards defence (e.g., cohesion funds), b) contributions from the European Investment Bank (EIB), c) private investments, and d) ensuring financial predictability for the European defence industry in the next Multiannual Financial Framework (MFF), currently under negotiation. Overall, the resources envisaged in the White Paper are shown in Figure 1.

Figure 1: Envisaged resources for EU defence in the White Paper



Regarding the capability needs, the White Paper identifies seven priority areas: Air and missile defence, Artillery systems, Ammunition and missiles, Drones and counter-drone systems, Military Mobility, AI, Quantum, Cyber & Electronic Warfare and strategic enablers & critical infrastructure protection. Additionally, the Proposal for a SAFE Regulation (i.e., the €150 billion funding instrument mentioned above that accompanies the White Paper) refers to the following two categories of defence products, the common procurement of which will be funded:

1. Category One: ammunition and missiles, artillery systems, small drones and related anti-drone systems, critical infrastructure protection, cyber and military mobility, and
2. Category Two: air and missile defence, drones (other than small ones) and related anti-drone systems, strategic enablers, space assets protection, AI and electronic warfare.

‘Money Makes the World Go Round’: Financing EU Defence

National resources for defence

In 2023, the EU member-states spent €279 billion on defence, marking an almost 10% increase in defence spending compared to 2022 (€254 billion). Approximately one fourth of this expenditure (26%) was directed to research, development and procurement of defence equipment.^[1] In 2024, the total defence expenditure made by the EU member-states reached (provisionally) €326 billion, an almost 17% rise compared to 2023, which amounts to 1.9% of the EU's GDP and is very close to the 2% NATO requirement. These figures are in line with the broader, decade-long trend of increased military spending, especially fuelled by the Russian invasion into Ukraine in 2022.

Still, Europe is lagging in military deterrence and defence, and much more money needs to be poured to close the gap in terms of military capabilities, especially should the US truly reconsider its military presence in Europe. This is the underlying logic behind the proposal to create additional fiscal space for member-states to invest more in defence, bypassing the strict framework of the EU's macroeconomic governance. The ReArm Europe plan calls for such a fiscal margin for higher defence expenditures (of up to €650 billion) through the coordinated activation of the national escape clause by the member-states. The national escape clause will apply from 2025 to 2028, for expenditure up to 1.5% of GDP. The reference year is 2021, i.e., the last pre-war year when the EU member-states had spent €214 billion on defence. In other words, if the national escape clause has been activated and a member-state's increase of military expenditure remains within the 1.5% ceiling, the excessive deficit procedure will not be launched, even if the total budget deficit exceeds the limits set by the revised rules of the fiscal and macroeconomic governance framework. The EU's executive branch has invited all - interested - member-states to submit a request to activate this escape clause by the end of April 2025. The member-states' requests will be coordinated by the Council in order to accelerate the process, and the recommendations activating the national escape clause(s) will be adopted by qualified majority voting (QMV).

On- and Off-EU Budget resources for defence

Besides the financial resources under the full control of each member-state's government at the national level, there are two main channels of financing defence-related activities at the EU level: first, a direct budget line from the EU budget and second, off-EU budget resources that are collectively managed by EU member-states. As regards the former, [Article 41](#) of the Treaty on the European Union (TEU) forbids, in principle, the use of the Union budget for operations having military or defence implications. Hence, the Commission's main defence-related initiatives have focused primarily on strengthening the European defence industry and supporting the development of dual use infrastructure, with an allocated budget of approximately €10.55 billion in the current MFF.^[2] These initiatives comprise the [European Defence Fund](#) (EDF), the [Military Mobility](#), the [Act in Support of Ammunition Production](#) (ASAP) and the [European Defence Industry Reinforcement through common Procurement Act](#) (EDIRPA). The [European Defence Industry Programme](#), which falls in this category and is agreed to provide 1.5 billion over the period 2025-2027, has yet to be adopted. The legal basis for financing the European defence industry lays primarily in Article 173(3) of the Treaty on the Functioning of the European Union (TFEU), which touches upon the industry's competitiveness. Other relevant TFEU articles that could be used to finance European defence-related projects comprise Article 179, on the improvement of the EU's scientific and technological base, Article 170 on the development and interconnection of trans-European networks, and Title XIX on research, technological development and space policy. As far as the second channel is concerned, the largest defence-related, off-EU budget tool is the European Peace Facility (EPF). As depicted in Figure 2, comparing the two categories, the biggest part of the funds allocated to EU defence remain under full member-states' control.^[3]

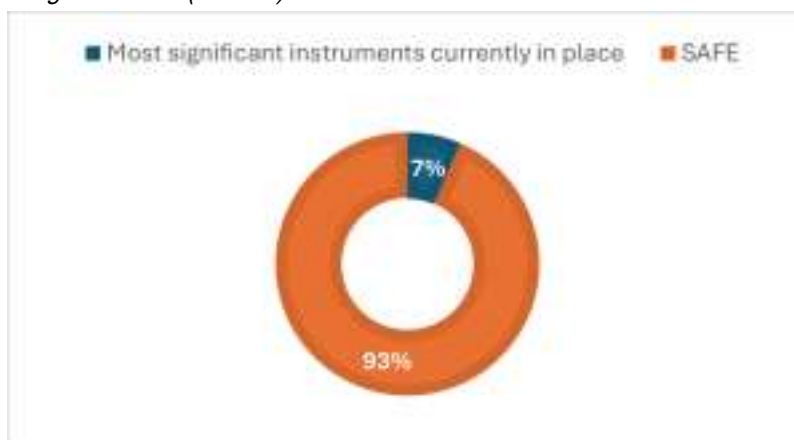
Figure 2: EU budget and off-budget major defence-related tools



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The Proposal for a SAFE Regulation has the potential to make available up to €150 billion, a huge upgrade compared to the current situation, as shown in Figure 3. The SAFE Instrument operationally looks very similar to the EDIRPA, as it focuses on providing the necessary financial resources to procure eligible defence equipment jointly. However, financially, the two instruments are totally different as SAFE, in its current format at least, will operate through loans (and subsequently debt), whereas EDIRPA provides grants. Consistent with the general approach of EU defence funding mechanisms, the SAFE Instrument promotes a cooperative format. In this context, common procurement under SAFE requires at least the involvement of one member-state in conjunction with either another member-state or an eligible third country.

Figure 3: EU Budget funding for defence(-related) initiatives



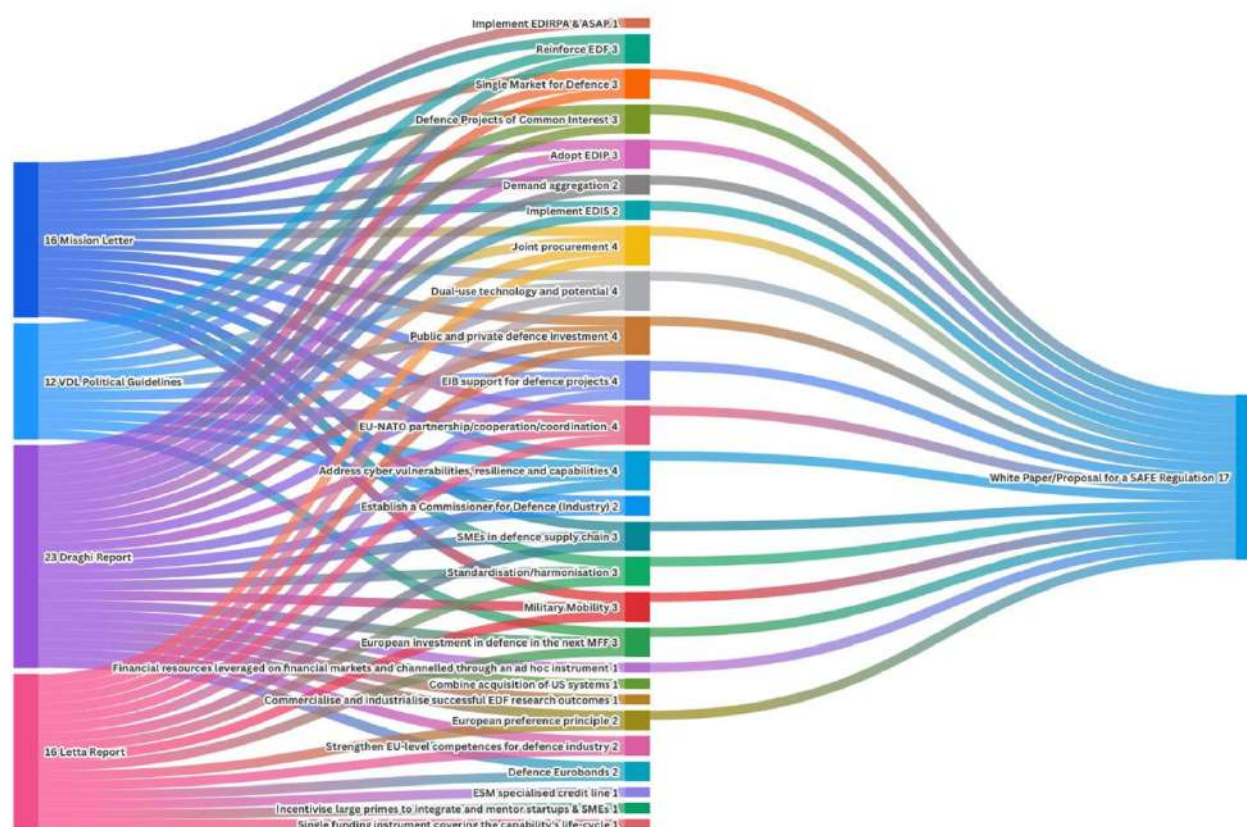
From Reports to Action: Shaping the Future of EU Defence

A 2024 [briefing](#) from the European Parliamentary Research Service brought together the various proposals for the future of EU defence that were put forward in four different documents: a) the Mission Letter to the then Commissioner-designate

for Defence and Space, b) Von der Leyen's Political Guidelines, c) Draghi Report and d) Letta Report. The great majority of the proposals mentioned in the four documents have been integrated into the White Paper and the Proposal for a SAFE Regulation, as clearly shown in Figure 4. The interconnection between defence policy and economic competitiveness and the extent to which these two areas are mutually reinforcing are evident. The defence industrial policy [aims](#) to enhance military readiness, while also seeking to bolster economic growth, job creation and innovation. This relationship is highlighted in the Letta and Draghi Reports, both of which focus primarily on the economy, albeit emphasising the importance of a robust EU Defence Technological and Industrial Base. Most of their insights and proposals found their way into the White Paper.

The proposals that did not get through refer to sensitive political issues, such as the issuance of "Defence Eurobonds", or older initiatives and/or institutional arrangements that are already in place, like, for example, EDIRPA & ASAP and the proposal for a Defence Commissioner. In addition, Letta's proposal for the creation of a European Stability Mechanism (ESM)-like specialised credit line was not outrightly rejected but rather treated in a non-committing way. The White Paper vaguely notes that if the demand by member-states for funds for defence-related investments outstrips supply, then *"the Commission will continue to explore innovative instruments, such as in relation to the European Stability Mechanism"*.

Figure 4: Proposals integrated into the White Paper/Proposal for a SAFE Regulation



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Critical Assessment and the Road Ahead

'ReArm Europe' and the White Paper have managed to raise awareness about the need to further invest in EU defence. Politically, they have sent a strong message about the Union's commitment to security and enhancing defence capabilities. They have emphasised the necessity to direct money towards defence, reflecting a proactive approach and have signalled a level of readiness to act, especially in combination with the publication of the Preparedness Union Strategy. However, there are four main concerns that are hard to ignore:

- First, as discussed above, the lion's share of the ReArm Europe plan will come from the national budgets. While the flexibility to use additional national resources is a positive first step, it remains unclear to what extent member-states will actually decide to invest in defence and, more importantly, whether those investments will be directed towards what is truly

needed. In particular, the [International Classification of the Functions of Government](#) (COFOG), which will be used to measure the member-states' defence expenditures, includes a very broad set of different sub-categories. For example, COFOG Category 02 - Defence entails expenditure on military personnel, other non-combat defence forces and military aid. There is a genuine concern that, **without a robust coordination mechanism**, funds may be allocated to less pressing areas and may serve other - national and/or domestic- objectives and interests. To be more specific, there is a possibility that additional defence spending may predominantly be allocated to cover personnel costs rather than addressing critical needs, such as the development of advanced military capabilities or training. Achieving the right balance in order to guarantee long-term strategic readiness is crucial. Furthermore, efficiency and effectiveness in defence cannot be assessed solely in financial terms. Without a clear focus on **standardisation and interoperability**, progress will likely remain incremental rather than transformative. Russia's war of aggression against Ukraine has underscored the critical importance of ensuring that national armed forces are capable of operating together effectively and efficiently. As such, the European family has yet to decide how to foster standardisation and interoperability. To achieve this goal, different options exist:

1. Alignment of EU defence initiatives with established NATO standards, and/or
 2. Strengthening the Coordinated Annual Review on Defence (CARD) and the Capability Development Plan (CDP) to improve alignment between member-states' defence planning and capabilities, and/or
 3. Use/strengthening of existing mechanisms (for example, the European Defence Agency) or launch of new - potentially pan-European - initiatives (for example, the European Defence Mechanism, see below).
- Regarding the fiscal space that the national escape clause may provide, an issue not addressed is **how the (already destabilised due to the tariff war) financial markets will respond to potential increases in debt levels** across the EU member-states. Southern EU member-states have already expressed their [doubts](#) on the possibility of further indebting themselves, which will undermine - or further derail - the long-term sustainability of their sovereign debt. Instead, they favour the issuance of "**Defence Eurobonds**", which practically entails the EU borrowing money from the capital markets and then distributing it to member-states in the form of grants. Needless to say, in this case, the identification of the distribution criteria will be challenging. Another option would be the establishment of an ESM-like intergovernmental mechanism, called **the European Defence Mechanism (EDM)**, as described in a Bruegel [proposal](#) prepared for the Polish Presidency. To be more precise, this extra-EU intergovernmental organisation could act as a "planner, funder and potentially owner of strategic enablers", allowing the debt incurred to acquire certain defence assets to remain on the EDM's books instead of national accounts.
 - Although "*implementation, implementation, implementation*" is important, one of the key criticisms lies in the **creative ambiguity** that characterises parts of the White Paper. Given diverging views among member-states, certain concepts are not fully clarified and allow for multiple interpretations. For example, the Proposal for a SAFE Regulation contains a European preference clause for the procurement source (at least 65% of the costs of the final product must originate from within the Union, Ukraine or EEA/EFTA states). However, the text seems to adopt an extremely wide definition vis-à-vis the potentially eligible third countries that may participate in a procurement consortium. In particular, it states that *'the Union may conclude bilateral or multilateral agreements with like-minded countries, namely acceding countries, candidate countries other than Ukraine and potential candidates'*. In that sense, all current and potential candidate countries constitute like-minded partners for the Union, which is - at least - disputable in the current geopolitical context.
 - Finally, issues of implementation are closely linked to (the lack of) legitimacy. It is crucial to encourage public understanding and support for the need to boost defence investments. By having Article 122 TFEU as a legal basis, the Commission bypasses the European Parliament, although the latter has repeatedly positioned itself in favour of enhanced defence cooperation. For example, the European Parliament has recently proposed [a higher](#) budget for EDIP, indicating that it is ready to constructively back such defence-related initiatives. It has also [called](#) on the European Commission and the member-states *"to enable and strengthen parliamentary oversight of [EU external action](#)...by involving Parliament in the proper further implementation and scrutiny of the EPF and the Strategic Compass"*, thus highlighting its willingness and readiness to oversee key defence tools. **The exclusion of the European Parliament from the legislative process could lead to mounting public criticism and a growing negative public disposition to increased defence spending.**

All the aforementioned arguments are deeply interconnected with the absence of a truly common threat perception and, by extension, the member-states' unwillingness to establish a truly Common Foreign and Security Policy. As such, it becomes nearly impossible to effectively align national defence (industrial) strategies and investments. Obviously, in the

absence of such a unified vision and foreign policy framework, governments prioritise national needs over broader pan-European strategic objectives. Can we realistically expect EU defence to emerge in such a political vacuum?

[1] Official [data](#) from the European Defence Agency (EDA).

[2] Different numbers may also appear due to inflation and changes in currency exchange rates.

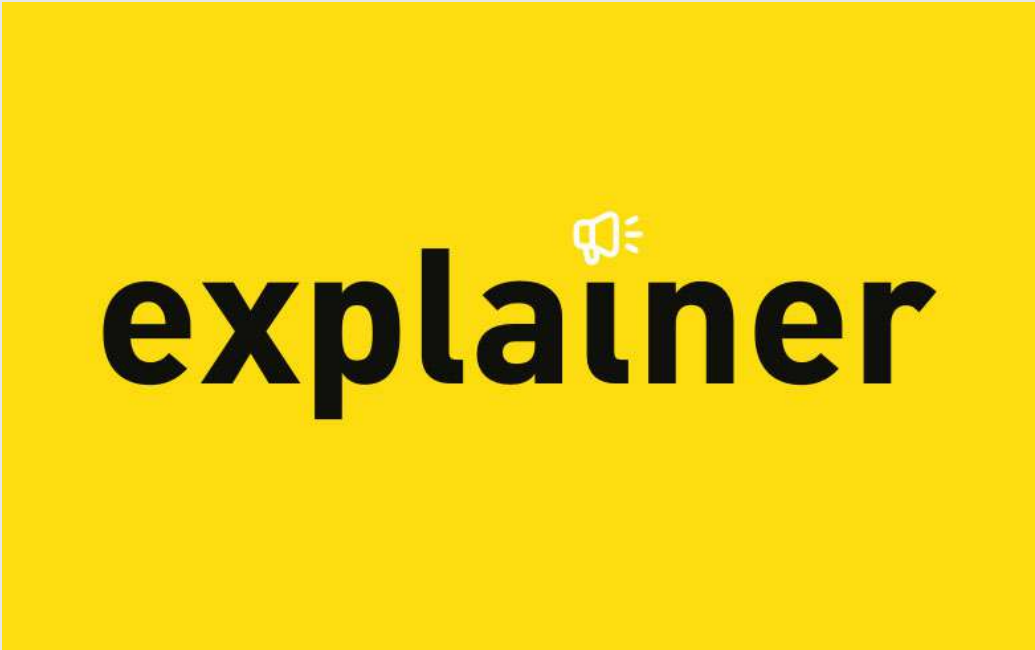
[3] Other relevant expenditures comprise the national contributions to CSDP military missions and operations as well as EU Battlegroups. Although these are EU-led initiatives, the associated costs are, in principle, borne by the participating member-states under the 'costs-lie-where-they-fall' principle.

ELIAMEP Explainer – SAFE: new financial instrument for the common procurement of defence equipment

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May 2025



explainer

Basic information: what, how much, how, and until when?

SAFE (Security Action for Europe) is a new financial instrument of up to EUR 150 billion, aimed at supporting Member States opting to undertake immediate and large-scale defence investments through the common procurement of specific categories of defence equipment. It is part of the wider 'ReArm Europe' plan worth a total of EUR 800 billion. SAFE represents the EU component of this initiative, complementing the remaining EUR 650 billion in national resources, which will not be included in the EU's assessments of Member States' public deficits and debt levels. The SAFE funds will be raised through borrowing by the European Commission, on behalf of the European Union, from capital markets or financial institutions in order to be channeled in the form of loans to Member States. According to the Regulation, payments to Member States may be approved until 2030.

Explaining the rationale: why, why now, and why loans through the EU?

The main reason for the EU's motivation to act is Russia's invasion of Ukraine in February 2022, and the wider geopolitical shifts, which are explicitly referred to as "an existential challenge for the EU". A number of additional factors have made the need for defence investment cooperation even more urgent. These include, among others, the shift of US interest towards China, US pressure on European partners to share the financial burden for European defence within the North Atlantic Treaty Organisation (NATO), President Trump's return to the White House, and operational issues such as the difficulty of deploying and maintaining forces in the field under existing European initiatives (e.g. CSDP missions and operations and EU Battlegroups). In addition, SAFE was introduced to contribute to the implementation of the White Paper for European defence readiness 2030 and to address a significant defence funding gap in the current budgetary period. In particular, the resources made available under the European Defence Fund (EDF) and the Defence Industrial Development Programme (EDIP) are not considered sufficient, while any redirection of additional EU funds to defence will only be possible from 2027 onwards, in the context of the new EU Multiannual Financial Framework (MFF). Finally, the European Commission will borrow, on behalf of the EU, as it enjoys a better credit rating than some Member States. At the same time, the long loan repayment period and VAT exemption in cases where the SAFE instrument is used, serve as an additional incentive for participating Member States.

The legal basis of the Regulation

The Regulation uses Article 122 of the Treaty on the Functioning of the European Union (TFEU) as its main legal basis. This article applies in emergency situations and allows the Council, on a proposal from the Commission, to provide financial assistance to a Member State that "is in difficulties or is seriously threatened with severe difficulties." This article has been used in the past, with typical cases being the Regulations on (a) emergency support for the migration and refugee situation in 2016, (b) the SURE programme to support employment during the pandemic in 2020, and (c) the establishment of the EU Recovery Instrument after the pandemic in 2020. However, by relying on this particular legislative basis, the European Parliament is sidelined, as the ordinary legislative procedure, which involves the Parliament as a co-legislator, does not apply. Instead, decisions are taken in the Council of Ministers by qualified majority, depriving individual Member States of the right of veto. At the same time, it should be noted that previous and ongoing efforts to strengthen the European defence industry are based on Treaty articles related to industry and competitiveness. There is, therefore, a clear distinction between initiatives aimed at boosting the European defence industry and the Common Security and Defence Policy, to which the principle of unanimity applies.

Controversial aspects of SAFE

Four key points of SAFE raise concern:

1. Some countries, mainly in the Mediterranean, have argued for the replacement of loans with grants. The core of this argument lies in the fact that the use of the SAFE instrument would lead to an increase in public debt, placing additional strain on national budgets and making them vulnerable to the reactions of the financial markets.
2. The exclusion of the European Parliament deprives the directly elected representatives of the European demos of the possibility of participating in the negotiations. The legitimacy of this instrument is thus called into question, contributing to the broader criticism regarding the absence of the European Parliament and citizens from crucial decisions.

3. According to the Regulation, the European Free Trade Association (EFTA) countries that are members of the European Economic Area (EEA) (i.e. Iceland, Liechtenstein and Norway) and Ukraine can participate in the SAFE instrument. The instrument is also open to acceding, candidate and potential candidate countries as well as to countries with which the EU has signed a Security and Defence Partnership (Moldova, Japan, South Korea, North Macedonia, Albania and, most recently, the United Kingdom), upon conclusion of a separate bilateral or multilateral agreement. According to the Greek side, these agreements (should) have as their legal basis Articles 212 and 218 TFEU, which together stipulate that if the contracting party is a candidate country, decisions must be taken unanimously. At the same time, there is a provision in the Regulation for a financial contribution from a participating third country, which shall be defined in the abovementioned bilateral or multilateral agreements. Therefore, in simple terms, in case Turkey wishes to formally participate in the SAFE instrument, Greece (will) have a veto power and can, in consultation with the other Member States, set the conditions for any financial contribution from the former to the EU.
4. Regarding the country of origin of the defence equipment that a consortium may procure, the 65%-35% rule applies. In particular, the cost of components originating outside the EU, the EEA-EFTA States and Ukraine cannot exceed 35% of the cost of the final product (with the remaining 65% coming from the aforementioned countries). Therefore, any Turkish "contribution" cannot exceed 35% of the value of the final product. At the same time, the Regulation provides that "no component shall be sourced from a third country that contravenes the security and defence interests of the Union and its Member States", thus leaving room to limit the participation of the Turkish defence industry. This, however, would require considerable political and diplomatic capital from Athens. The precise way of implementing the above remains fluid and is expected to be clarified in the forthcoming negotiations.

A window of opportunity for Greece

Although the legal basis used does not allow Greece to have full control over developments, the Regulation represents an opportunity to promote Greek national interests. We are at a critical juncture, where both many European partners and Turkey, for different reasons, want close cooperation. For Turkey, its participation in European efforts for the common procurement of defence equipment is vital not only for economic but also for political reasons. By gaining access to European defence funds, it will be able to consolidate its position in the European security architecture, strengthening its geopolitical role. For many European partners, the European security architecture includes Turkey, as it is a member of NATO and has a sizeable defence industry, which has developed close links with the defence industries of certain Member States. In this light, Greece can apply pressure and set specific terms and conditions in order to allow (or rather not to prevent) such a development. In this context, there is therefore a window of opportunity for a broader 'rapprochement' on the basis of rules and objectives set by the Greek side, including the lifting of the *casus belli*.

A European defence industrial ecosystem in the making: Evidence from the EDF

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George Matsoukas

June 2025



Over the last decade, the European Union has taken major steps to improve its defence industrial base, reflecting a growing strategic ambition and assertiveness. The European Defence Fund (EDF), launched in 2021, and managed by the European Commission, marks a pivotal step in the EU's efforts to build a more integrated and competitive defence industrial base.

As of June 2025, the EDF has been implemented through annual work programmes from 2021 to 2024, supporting 224 collaborative defence projects involving entities from different EU member states. The aim of the policy paper is to initially evaluate the extent and nature of cross-border industrial cooperation among EU member-states (excluding Malta) and Norway under the European Defence Fund, and to identify emerging patterns, strategic partnerships, and sector-specific dynamics that reflect progress toward the Single Market for Defence.

Our main findings include:

- **Success of the EDF:** The EDF has successfully built a dense, interconnected network of cooperation among entities from participating countries, promoting shared expertise, EU-wide interdependence, and a more competitive European defence sector.
- **Clusters:** Intense cooperation is concentrated among countries like France, Germany, Italy, Spain, Greece, the Netherlands and Belgium.
- **Specialisation:** Entity participation across defence (R&D) categories varies by country, often reflecting national strengths or geostrategic priorities.
- **Coordinators:** The role of the coordinators becomes more and more important as the dense network of collaboration is expanded.

Our recommendations touch upon three main areas:

- **Funding:** The EDF's success justifies increased funding to strengthen the EU's defence capabilities and support industrial cooperation.
- **Inclusivity:** To avoid dominance by a small number of large/prime players, the EU should strengthen support for underrepresented countries to ensure broader participation.
- **Regarding Greece:** Greek entities should be further encouraged to join EDF projects, linking national talent and research initiatives with EU networks to boost innovation and counter brain drain.

Introduction

Nearly a decade has passed since the European Commission, under Jean-Claude Juncker, implemented the first EU-wide defence industrial initiatives. During this decade, the European Union's defence industry has seen significant developments, more recently with the announcement of the ReArm Europe Plan and the SAFE Regulation that prioritises defence industrial readiness. At the same time, the European Defence Fund (EDF) has been a crucial and active instrument since 2021, signaling the EU's intention and efforts made to close capability gaps, foster innovation and strengthen pan-European defence industrial collaboration.

To what extent have the EU member-states (excluding Malta) and Norway succeeded in building and reinforcing linkages between their defence industries? Which member-states tend to cooperate more intensively with which partners, and do such patterns vary depending on the sector or category of defence capability in which they operate?

These questions become ever more relevant as transnational industrial collaboration constitutes a driver for the development of a real Single Market for Defence, as envisioned by the Draghi Report. Furthermore, understanding the dynamics and structure of defence industrial cooperation among member-states in EU funding programmes is essential for making informed policy advice and decisions aimed at strengthening Europe's defence capabilities and industrial competitiveness, especially in the context of the negotiations for the next MFF 2028-2034.

Setting the Background: what has changed in the realm of defence

The EU is undergoing a profound transformation regarding security and defence. Long reliant on the North Atlantic Treaty Organisation (NATO) and the American security umbrella, the EU has increasingly begun to adopt -at least rhetorically- a more assertive and autonomous role in these fields. The broad concept of strategic autonomy, which was once perceived with scepticism, has gradually evolved into a necessity, with the EU realising that the *“ability to make its [the EU’s] own choices and shape the world around it through leadership and engagement”* is fundamental. After decades of underinvestment, fragmentation and external dependency, the EU is now treating defence industrial policy as a core pillar of its geopolitical awakening.

In this vein, over the past decade, the European family has taken concrete action to support both the demand and the supply sides of defence, giving more emphasis, though, until very recently, on the latter. In particular, the European Commission, under President Juncker, presented the European Defence Action Plan in 2016, paving the way for the Preparatory Action on Defence Research (PADR) (2017-2019) and the European Defence Industrial Development Programme (EDIDP) (2019-2020). Together, these two initiatives accumulatively channeled approximately 590 million EUR from the EU budget towards defence research and development (R&D). The EDF, which constitutes the successor of the two aforementioned tools, has been the flagship funding instrument for R&D in defence, earmarking almost 7.3 billion EUR for collaborative defence research and capability development for the current Multiannual Financial Framework (MFF). A smaller-scale supply-oriented instrument is the Act in Support of Ammunition Production (ASAP) with a budget of approximately 500 million EUR (2023-2025).

On the demand side, the European Defence Industry Reinforcement through common Procurement Act (EDIRPA) aims to incentivize the common procurement of ammunition, air and missile defence and platforms with a total budget of 310 million EUR until 2025. Furthermore, the European Defence Industry Programme (EDIP), whose negotiations have not yet been concluded, is expected to unlock 1.5 billion EUR from the EU budget for the period 2025-2027 to support both the production and common procurement of defence equipment, building on the experience from both ASAP and EDIRPA. On May 27, 2025, the Council established the Security Action for Europe (SAFE) instrument, incentivising the common procurement of specific categories of defence equipment, which will be supported by up to 150 billion EUR in funding borrowed from capital markets or financial institutions by the European Commission until 2030. However, it must be noted that in contrast to the aforementioned instruments, SAFE offers loans, not grants, which will have to be repaid by the member states.

A combination of external factors and the new geopolitical understanding drives the EU’s defence industrial efforts. Starting with the former, the most obvious and pressing reason has definitely been Russia’s war of aggression against Ukraine. The invasion has exposed Europe’s inability to adequately ramp up its defence production levels. At the same time, the return of conventional and high-intensity warfare to the Old Continent has sparked concern among the European demos, as revealed by the most recent [Eurobarometer](#). Beyond Ukraine, a deeper strategic reorientation is underway. The post-Cold War assumption that Europe could rely indefinitely on the United States (US) for the protection of its territorial integrity no longer applies. [Quoting](#) US Secretary of Defence, Pete Hegseth, *“It’s deterrence and peace through strength, but it cannot be reliance”*. In addition, President Trump has [repeatedly](#) shaken the transatlantic trust. In the meantime, the US pivot to the Indo-Pacific constitutes a long-term strategic recalibration which has been promoted since the Obama administration. As Washington’s (strategic) interests shift towards the People’s Republic of China (PRC), European security can no longer assume that American help is a given.

The new geopolitical understanding is closely linked to the return of Realpolitik in the international scene. Great power competition and broader security threats have raised the importance of the Union’s broader industrial policy. The development and the resilience of the EU’s defence and technological industrial base are now considered part of its efforts to achieve strategic autonomy. In this environment, the EU’s traditional soft power must be complemented by credible military capabilities, defence innovation capacity and competitiveness.

Data collection and methodology

Why studying the EDF matters

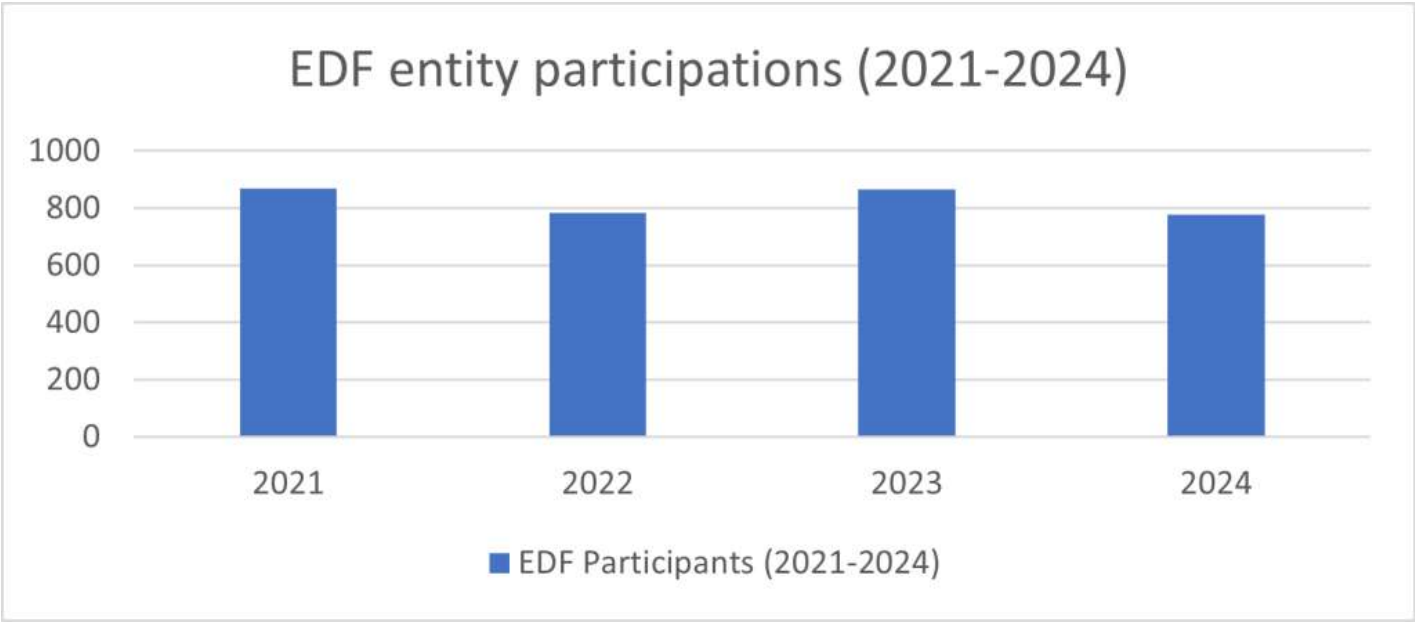
To this end of developing credible military capabilities, the EDF plays a crucial role, being the core tool of defence industrial

cooperation within the EU framework. It constitutes the first fully-fledged EU-funding mechanism, marking a shift in the Union’s approach to defence. Studying the patterns of cooperation under the EDF provides valuable insights into both the functional and political evolution of the EU’s defence industrial policy.

Furthermore, the EDF offers temporal depth and continuity. In contrast to shorter-term or ad-hoc funding instruments such as EDIRPA or ASAP, the EDF covers a multi-annual time period, namely the current MFF (2021-2027). This provides a longer and more stable timeline for assessing emerging patterns of collaboration among defence industry actors. As of 6 June 2025, four rounds of EDF project selections have been publicly announced, allowing for a more representative and credible dataset. At the same time, data is not available from either EDIP (still under negotiations) or from SAFE (not yet implemented).

Finally, with a planned [envelope](#) of 7.3 billion EUR over seven years, the EDF surpasses other comparable instruments both in scale and ambition. Although the amount may still be considered insufficient relative to Europe’s growing strategic needs (or ambitions), the funding volume makes the EDF one of the most important financial tools for defence capability development at the EU level. This financial magnitude also tends to attract many stakeholders (e.g., companies from the defence sector, research institutes, universities), which allows for a more comprehensive and representative picture of the emerging European defence ecosystem. In particular, [approximately](#) 4 billion EUR has been invested between 2021 and 2024, with almost 3,000 entity participations from all EU member states, except Malta, and Norway.

Figure 1: EDF entity participations (2021-2024)



Source: Fiott ([2025](#))

Data mining process

For the needs of our research, the following data gathering process was followed, combining manual research with automated tools to ensure accuracy. First, we reviewed in a systematic way all individual project factsheets released under the EDF for the years 2021, 2022, 2023 and 2024. As of 6 June 2025, a total of 224 projects have been publicly selected for EU (co-)funding. These factsheets, available on the European Commission’s (DG DEFIS) official website, list all participating entities, their role in the consortium and their country of origin.

Next, for each project, we identified and recorded every entity listed as a participant (including the coordinator), along with the country from which it originates. This step is critical for making the mapping of defence industrial cooperation possible.

Using the data above, we constructed a 27×27 matrix to capture the frequency of cooperation between entities from different participating countries. Each row and column of the matrix represents one of the 26 EU member-states (excluding

Malta) plus Norway. The matrix entries reflect the number of projects in which at least two entities from two given countries jointly participate in an EDF selected project, thereby indicating the intensity of bilateral cooperation.

Beyond the aggregate matrix, we also built additional matrices to reflect cooperation in specific categories of defence capability (e.g., air combat, cyber). For 2021, 2022 and 2024, the project categorisations were available on the Commission's official website. However, for the 2023 selected projects, no such categorisation was publicly available at the time of writing. To resolve this, we manually reviewed each 2023 project and assigned it to the most relevant/appropriate category, based on the thematic guidelines outlined in the official EDF Work Programme for that year.

In order to minimise the probability of human error, we developed a Visual Basic for Application (VBA)-driven programme, with the support of artificial intelligence (AI), to automate the generation of matrices. Each EDF project was uploaded as a PDF file to Power BI. While the initial stages of project identification and classification required human judgment, especially in 2023, automation ensured consistency in matrix construction and allowed for an efficient verification process.

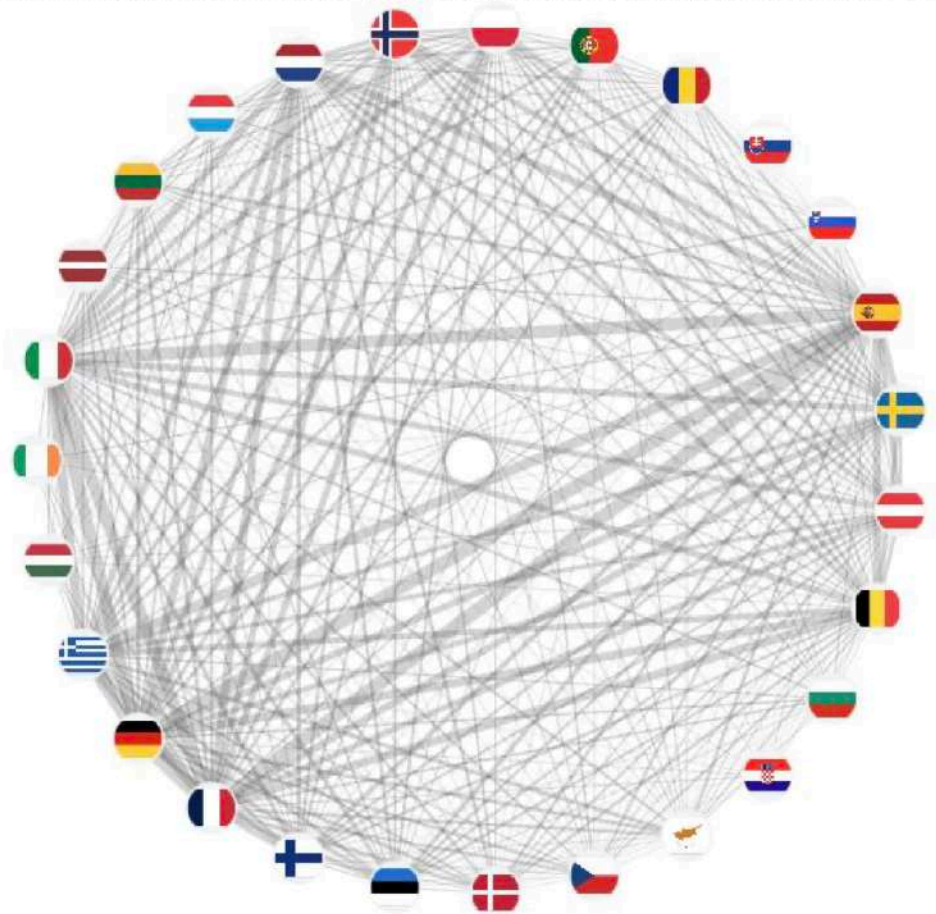
Building the Matrix of Cross-border Industrial Defence Cooperation

In this section, we present the results of our research on cross-border industrial cooperation within the framework of the EDF from 2021 to 2024. The findings are visualised through a series of graphs and tables, reflecting the cooperation between entities from the participating countries. In addition to the general matrix, which covers all categories, we also provide 18 separate matrices corresponding to specific capability categories. The National Focal Points (NFPs) category is taken into account only in the general matrix. These thematic categories enable a better understanding of how industrial partnerships vary across different domains, providing deeper insight into the patterns of specialisation and collaboration within the EU's defence landscape. To ensure clarity and maintain the readability of the main text, the full tables containing all data is provided in the Annex.

General matrix

The general matrix reveals a high level of interconnectedness among the entities of participating countries. Nearly all participating countries have established at least one cooperative link with each other. The thickness of each line connecting two countries represents the frequency of cooperation between entities from those respective countries. Thicker lines indicate a great number of joint participations. As such, it is evident that France, Germany, Italy, Spain, followed by Belgium, Greece and the Netherlands, are involved in a significantly large number of cooperative projects and emerge as central nodes within the broader network. Based on our data, only four country pairs show no collaborative links, namely Croatia-Cyprus, Croatia-Estonia, Slovakia-Hungary and Hungary-Luxembourg. These exceptions highlight rare gaps in the otherwise dense network of partnerships.

Figure 2: General matrix of cross-border industrial cooperation in the framework of EDF (2021-2024)



Specific categories

While the general matrix offers a comprehensive overview, a closer examination at the category level provides more insights. When the data is disaggregated by capability domain, it becomes evident that fewer countries tend to cooperate within individual categories, particularly in specialised or technically demanding areas (e.g., air and missile defence, underwater warfare). Even in these categories, entities from approximately twenty participating countries have been identified. In broader or more horizontal domains, such as SME calls, digital transformation or cyber, we observe a more diverse range of participating countries.

Figure 3: EDF industrial cooperation in Air and Missile Defence (2021-2024)



Figure 4: EDF industrial cooperation in Air Combat (2021-2024)



Figure 5: EDF industrial cooperation in Cyber (2021-2024)



Figure 6: EDF industrial cooperation in Digital Transformation (2021-2024)



Figure 7: EDF industrial cooperation in Disruptive Technologies (2021-2024)



Figure 8: EDF industrial cooperation in Energy and Environment (2021-2024)



Figure 9: EDF industrial cooperation in Ground Combat (2021-2024)



Figure 10: EDF industrial cooperation in Information Superiority (2021-2024)



Figure 11: EDF industrial cooperation in Materials & Components (2021-2024)



Figure 12: EDF industrial cooperation in Medical Response and CBRN (2021-2024)



Figure 13: EDF industrial cooperation in Naval Combat (2021-2024)



Figure 14: EDF industrial cooperation in Protection & Mobility (2021-2024)



Figure 15: EDF industrial cooperation in Sensors (2021-2024)



Figure 16: EDF industrial cooperation in Simulation & Training (2021-2024)



Figure 17: EDF Industrial cooperation in SMEs calls (2021-2024)



Figure 18: EDF industrial cooperation in Space (2021-2024)



Figure 19: EDF industrial cooperation in Technological Challenges (2021-2024)



Figure 20: EDF industrial cooperation in Underwater Warfare (2021-2024)



All figures were created with flourish.studio

Is an EU Industrial Defence Ecosystem Emerging?

The Key Insights

The analysis of data from the EDF for the results of 2021, 2022, 2023 and 2024 reveals several insights into the evolving landscape of the defence industrial cooperation in the EU. These findings may provide valuable insights for shaping future policy directions at both the national and European levels.

The first and most notable finding is the **emergence of a dense and increasingly interconnected network** of industrial collaboration across entities from the participating countries. This web of partnerships demonstrates that the EDF has succeeded in one of its central [objectives](#): *“to promote cooperation between companies, including SMEs and research actors throughout the Union”*. By enabling entities from different member-states and Norway to jointly research, design, develop and/or test defence technologies, the Union provides a platform for building shared expertise, transferring know-how and promoting the involvement of all interested (and eligible) countries in developing a truly European defence technological and industrial base. This, in turn, allows each participant to capitalise on its own comparative advantages,

reinforcing strategic EU-wide interdependence rather than duplication or dependency on third countries (to the extent this is possible). Moreover, as cooperation intensifies across borders, the European defence sector may become more efficient and competitive at the international level.

The second major finding highlights the **existence of concentrated clusters** (or “isles”) of more intense cooperation, particularly among certain countries. These include France, Germany, Italy, Spain, Greece and the Netherlands. Their enhanced presence is not surprising, as these states have expressed their interest in leveraging the EDF funding since its [early](#) stages. Another factor may be that large and promising projects naturally gravitate toward countries with high R&D capacity, experience or enhanced dual-use capabilities. At the same time, entities from smaller states seek to “plug into” projects led by bigger players to gain access to European consortia so that they receive EU funding, build their reputational capital and integrate more fully into the European defence value chains.

The third key insight relates to **participation in specific categories**. The data (Figures 3-20) clearly shows that not all countries are equally represented across all categories of defence R&D. Participation levels often correspond to national comparative advantages, specialisations or geostrategic profiles. For example, in the naval domain, all entities come from participating countries with direct maritime borders. Moreover, the participation of (entities from) Finland, Norway, Sweden and the Baltic states in underwater warfare is noteworthy, given the hybrid attacks and sabotage incidents targeting undersea infrastructure in the Nordic-Baltic region. This finding reinforces the idea that the EDF constitutes a mirror of national industrial strengths and strategic preferences.

Finally, a fourth finding concerns the increasingly pivotal **role of project coordinators**. As noted before by Fiott ([2024](#)), coordinating an EDF project entails more than administrative responsibility. Project coordinators act as network builders and managers. Taking into account this dense network of cooperation, their role becomes extremely important.

Limitations and future research

While the findings presented above offer a valuable overview of defence industrial cooperation through the EDF, five main limitations should be acknowledged, each of which may function as a fruitful ground for future research.

1. The analysis is primarily quantitative. While it captures the presence of cooperation between entities from different countries, it does not measure the quality, depth or strategic significance of those partnerships. To assess these dimensions, qualitative case studies are needed, while interviews with project coordinators and national contact points could shed further light on substantial (internal) issues of collaboration within each consortium.
2. Directly correlated to the first limitation, qualitative research may reveal interesting facts about the ownership of companies (i.e., the country of origin of the [parent companies](#)) that benefit from EDF (co)-funding. For instance, Greece's INTRACOM Defense, which has been [awarded](#) at least 15 million EUR through the EDF, was acquired by Israel Aerospace Industries - Israel's biggest state-owned defence company - in March 2023. Another example would be MILREM AS, whose majority stake was [acquired](#) by the Emirate EDGE GROUP in February 2023. Furthermore, the US has also been indirectly involved in EDF projects (e.g., [EPIIC 2021](#)), for example, through Germany's Rockwell Collins Deutschland GmbH, a [subsidiary](#) of Rockwell Collins, Inc. More importantly, for Greece, Miilux Oy, a Finnish manufacturing company participating in the EDF 2021 project [ECOBALLIFE](#), had its majority shares [acquired](#) by Türkiye's OYAK Group in 2019. The discussion about the ownership shares and the (indirect) participation of entities from third countries has become more relevant after the SAFE Regulation and the broader discussion it has triggered regarding the role and participation of third countries in EU-funded schemes and initiatives.
3. The current methodology maps cooperation at the country level, but not specific patterns of partner selection within each consortium. It would be interesting to examine whether the big players tend to cooperate with specific entities of equal size from certain countries, indicating a process of cartelisation in the defence sector.
4. The study does not assess the level of EU financial contribution allocated to each project, nor does it analyse the specific distribution of the funding among participating entities. Thus, it does not entirely capture the financial weight or the strategic importance of each entity's involvement.
5. The political context of cooperation is also not reflected in the dataset. It would be valuable to cross-reference industrial partnerships with indicators of political alignment or joint strategic interests. This could help policymakers understand to what extent defence industrial cooperation reflects broader geopolitical considerations.

Policy Recommendations

Different theoretical approaches offer alternative accounts for the dynamics driving the evolution of the EDF, stressing either its [neofunctionalist](#) features or its [intergovernmentalist](#) operational logic. To our understanding, it is clear that the EDF evolves into a mechanism for deeper structural integration in the defence sector by creating transnational consortia, fostering interoperability, and promoting European technological development and innovation. The increasing reliance on cross-border defence industrial partnerships and the creation of a dense network of cooperation may be the drivers for deeper political cooperation.

Building on all the above, three key policy recommendations emerge. Firstly, the EDF's success would justify a **significant increase in its funding under the upcoming MFF**. This will not only consolidate existing cooperation but also pave the way for more ambitious and strategically relevant projects. The commercialisation of successful EDF projects must also be supported through financial means, as proposed in the White Paper, while the implementation of European defence projects of common interest should take into consideration the lessons learnt, the good practices from the EDF as well as the Union's strategic needs.

Secondly, to prevent the emergence of cartel dynamics, where a limited number of large players dominate most projects, **the EU should further strengthen measures to promote inclusivity and broader participation**. Additional tailored incentives for SMEs must be promoted, while incentives for entities from less-represented countries shall also be considered. These actors may often offer significant added value, but they lack the institutional access and means compared to large defence contractors. The European Defence Innovation Scheme's (EUDIS) matchmaking process could be further expanded.

Last but not least, in the case of Greece, its entities have already demonstrated a capacity to contribute meaningfully to various categories. **Greek authorities should encourage greater participation not only from defence firms but also from research institutes and universities**. Indeed, involvement in EDF projects would not only provide additional funding streams for their activities, but also facilitate access to cutting-edge European networks, strengthen their visibility and create high-skilled employment opportunities in Greece. This mobilisation of scientific talent and research infrastructure can be closely linked to "Rebrain Greece", which aims to reverse the brain drain. EU-level funding could serve as a strong incentive for these highly skilled professionals to return and contribute to the development of a competitive Greek defence innovation ecosystem.

VDL 2.0: The Works and Days of the First Year

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September 2025



Ursula von der Leyen's second term at the helm of the European Commission is structured around seven thematic priorities that reflect the executive branch's effort to integrate diverse policy areas in pursuit of the prosperity of the European citizenry. The Commission's 2025 Work Programme introduces 51 new initiatives and places particular emphasis on simplification and the reduction of administrative burden, highlighting the shift towards "*a faster and simpler Union*". At the same time, there is a clear tendency for the EU to assume a more active role in policy domains where supranational involvement has traditionally been limited. For Greece, both the Union's achievements to date and its forthcoming actions have a direct impact on key national sectors. Meanwhile, the Greek government is preparing for the decisive role it will play in the negotiations on the new Multiannual Financial Framework 2028-2034.

- The forthcoming State of the European Union address, though generally framed in broad terms, provides a clear indication of the EU's trajectory for member states, citizens, businesses, and external partners, enabling them to adapt and align with upcoming initiatives.
- It is not merely a stock-taking exercise; rather, it represents a critical test of credibility, as it will raise the question of whether and to what extent the Commission can translate its announcements and ambitions into tangible measures. The shift from theory to action will determine both the Commission's institutional credibility and citizens' trust in the European project.
- At the same time, the new structure of the Commission will also come under scrutiny. Nine months after the creation of new portfolios within the College of Commissioners, it remains to be assessed whether these have delivered on their intended functions.
- Greece, holding the Presidency of the Council of the EU in the second half of 2027, will be at the forefront of negotiations that will determine the scope of financial instruments across all policy areas. For Athens, the challenge will be not only to forge common ground among member states but also to advance its own national priorities.

Introduction

Ursula von der Leyen's second term at the helm of the European Commission is structured around seven thematic priorities, based on the [political guidelines](#) she presented before the European Parliament in July 2024. The priorities for the 2024-2029 period are as follows: sustainable prosperity and competitiveness, European defense and security, supporting people, strengthening societies and the social model, preserving quality of life, protecting democracy and safeguarding values, Europe in the world, and preparing the Union for the future.

The [2025 Work Programme](#) was published in February 2025 and is organized around these political priorities, while also taking into account the guidelines and mission letters assigned to members of the College of Commissioners. In total, it introduces 51 new initiatives, at least 18 of which are legislative. Particular emphasis is placed on simplification, with more than 60% of the legislative proposals falling within this scope. The Commission President has repeatedly stressed the urgent need to reduce administrative burden and simplify legislation. In her political guidelines, she explicitly referred to her vision of "*a faster and simpler Union*."

In view of this year's State of the Union address, during which Ursula von der Leyen is expected to present the achievements of the College of Commissioners since taking office (1 December 2024), attention now turns to the analysis of the policies to be advanced in the near future. The address, though generally framed in broad terms, provides a clear indication of the EU's trajectory for member states, citizens, businesses, and external partners, enabling them to adapt and align with forthcoming actions.

While awaiting the address, it is useful to examine what has been achieved so far. This analysis is structured around the Commission's political priorities and presents illustrative examples of its most significant actions from December 2024 to the present. These actions have taken different forms (e.g. legislative proposal, strategy, action plan, roadmap, etc.), depending on the political maturity and objectives of each initiative.^[1]

The analysis then turns to the Greek perspective on both the Commission's achievements and its planned actions. The final section looks ahead to what can be expected in this year's State of the Union address.

Sustainable Prosperity and Competitiveness

[Mario Draghi's September 2024 report](#) served as the foundation for the [Competitiveness Compass](#), published at the end of January 2025. In short, the Compass sets out how the Union can: (a) strengthen innovation, (b) shift towards cleaner and more affordable energy, and (c) diversify its supply chains. In this direction, the Commission has released a series of strategies and other documents (e.g. the Clean Industrial Deal in February, the Startup and Scaleup Strategy and the Single Market Strategy in May, and the Quantum Europe Strategy in July). As expected, however, a considerable share of the Commission's output consists of (proposals for) legislative initiatives aimed at simplification. In particular, [six "Omnibus" packages](#) covering a wide range of policy areas have been tabled. Moreover, the political agreement in principle reached in the trade negotiations with four MERCOSUR states (December 2024) underscores the Union's continued commitment to promoting free and mutually beneficial trade. As shown in Table I, proposals for six legislative initiatives, one strategy, and one plan are expected to be submitted later this year.

Table I: Illustrative list of pending Commission initiatives for 2025 (sustainable prosperity and competitiveness)

Type	Title
Legislative proposal	Revision of the Sustainable Finance Disclosures Regulation
Legislative proposal	Digital Package
Legislative proposal	European Business Wallet
Legislative proposal	Accelerating industrial decarbonisation
Legislative proposal	Revision of the REACH Regulation (on chemicals)
Legislative proposal	Digital Networks
Strategy/Legislative proposal	Bioeconomy Strategy
Plan	Sustainable Transport Investment Plan

European Defense and Security

European defense and security have become a top priority for the Commission due, among other factors, to the war in Ukraine, broader Russian assertiveness, and U.S. disengagement from Europe. In this adverse geopolitical environment, Ursula von der Leyen created the portfolio of the Commissioner for Defense and Space, signaling the importance of this

new dimension. The Commission subsequently announced the [White Paper](#) on the Future of European Defense and the [“ReArm Europe” plan](#), which could channel up to €800 billion into strengthening Europe’s defense readiness.

Beyond strictly military initiatives, the Union appears to be embracing the ideas of the Niinistö’s Report of October 2024 and promoting strategies linked to the concept of “total defense.” Within this framework, the Preparedness Union Strategy, the proposal for a Critical Medicines Act, the Medical Countermeasures Strategy, the Stockpiling Strategy, combined with the Internal Security Strategy, the proposal for a Common European System for Returns, and the Action Plan on Cybersecurity for Hospitals and Healthcare Providers, all aim to provide a holistic safety net against multiple threats. Preparedness has thus become a central concern within the European family. In several national capitals, discussions are underway on reviving [military conscription](#), moving towards a Scandinavian-style “total defense” model combining military and civilian dimensions. While the implementation of the SAFE Regulation appears to be the Commission’s main priority, Table II presents the three initiatives expected to be announced in the near term.

Table II: Illustrative list of pending Commission initiatives for 2025 (European defense and security)

Type	Title
Legislative proposal	New rules on drug precursors
Legislative proposal	Firearms Trafficking Directive
Strategy	Migration and Asylum Strategy

Supporting People, Strengthening Societies and the Social Model

The cost of living, social inequalities, and the center-periphery divide have undermined the European way of life, while the modern era demands new skills for businesses and workers to adapt to evolving circumstances. With the aim of reinforcing the European social model, the Commission launched the Union of Skills in March, designed to upgrade citizens’ skills and enable the Union to attract and retain talent in critical sectors within its borders. Although the 2025 Work Programme does not include new initiatives on the housing crisis, the Commission President has [pledged](#) to: (a) present a plan for affordable housing, and (b) cooperate with the European Investment Bank to establish an investment platform for affordable and sustainable housing.^[2] By the end of the year, three initiatives are expected to be published to strengthen the social dimension, as indicated in Table III.

Table III: Illustrative list of pending Commission initiatives for 2025 (supporting people, strengthening societies and the social model)

Type	Title
Action Plan	European Pillar of Social Rights
Roadmap	Quality Jobs
Agenda	Consumer Agenda 2030

Preserving Quality of Life

Agriculture is considered an integral part of the European way of life. Its support is a prerequisite for the Union's sustainable growth and competitiveness. With the goals of food self-sufficiency and support for the food value chain, the Commission has placed particular emphasis on simplifying the procedures of the Common Agricultural Policy, while announcing the [Vision for Agriculture and Food](#) (February) to make farming and food sectors more attractive to young people. At the same time, the Commission has tabled a [proposal to amend the European Climate Law](#) (July), seeking to establish a 2040 climate target. Finally, the [Ocean Pact](#) and the [Water Resilience Strategy](#), both announced in June 2025, aim to boost the blue economy and protect water resources, whose resilience *"is regarded by the EU as a matter of security and crisis preparedness"*. According to the current Work Programme, no new initiatives are expected in this policy area.

Protecting Democracy and Safeguarding Values

At a time when liberal democracy is under challenge, strengthening democratic resilience and societal preparedness are key objectives for the Commission. Furthermore, the defense and reinforcement of the rule of law remain a central duty of the EU's executive branch as the *"guardian of the Treaties."* In this context, the [Roadmap for Women's Rights](#) (March) seeks to eliminate gender-based violence and ensure equal treatment of women. By year's end, three initiatives are expected to be presented, as shown in Table IV.

Table IV: Illustrative list of pending Commission initiatives for 2025 (protecting democracy and safeguarding values)

Type	Title
Communication	European Democracy Shield ^[3]
Strategy	Strategy to Support, Protect and Empower Civil Society
Strategy	Equality Strategies for LGBTIQ and Anti-Racism

Europe in the World

As the international environment grows increasingly dangerous and hostile to EU interests, the European family must be able to leverage its strength and build meaningful partnerships with like-minded actors. Accordingly, the Union unveiled its [Black Sea Strategy](#) (March), built on three pillars: (a) security, (b) sustainable development and connectivity, and (c) environment and preparedness. Beyond the eastern flank, however, the Union is also placing emphasis on its southern neighborhood, as evidenced by the creation of a dedicated Mediterranean portfolio within the College of Commissioners and the [establishment](#) of a new Directorate-General for the Middle East (DG MENA). At the same time, preparations for the announcement of a Mediterranean Pact and the development of a coherent Middle East strategy reflect the Union's clear interest in its southern dimension. Additionally, the EU is seeking to deepen ties with other regions across the globe, illustrated by the growing number of security and defense partnerships.^[4] In the field of transatlantic relations, the Union reached an [agreement](#) with President Trump in July 2025 on tariff levels, while also striving to secure [U.S. support](#) for any future peace-monitoring mission in Ukraine. Table V presents the two initiatives expected to be announced shortly

Table V: Illustrative list of pending Commission initiatives for 2025 (Europe in the world)

Type	Title
Pact	Pact for the Mediterranean
Joint Communication	EU-India

Preparing the Union for the Future

One of the Commission's most significant priorities is the next Multiannual Financial Framework (MFF) for 2028-2034. Early preparation of the proposal ensures stability and predictability in the Union's resources. According to the Commission's [proposal](#), the new budget will approach €2 billion, representing on average 1.26% of the EU's Gross National Income per year. The innovation lies in structuring the funds around four pillars: (a) national and regional partnership plans, including cohesion and agricultural policy; (b) cross-cutting programmes and instruments, such as EU funds; (c) external dimension and Common Foreign and Security Policy; and (d) European public administration. At the same time, the Commission is expected to table proposals to prepare the Union for potential enlargement.

The Greek Perspective: Priorities and Challenges

For Greece, the Union's actions have a direct impact on key national sectors. In the field of security and defense, Athens supports the new European initiatives and, in July 2025, formally [submitted](#) a request for loans worth at least €1.2 billion under the SAFE Regulation, seeking to bolster its defense capabilities through low-interest borrowing. Nonetheless, certain [contentious issues](#) remain, the most sensitive being the partial involvement of the Turkish defense industry in European schemes. Regarding the Union's interaction with third actors, Greece seeks closer cooperation with like-minded partners while promoting stability in relations with the United States for both strategic and trade reasons. The Black Sea Strategy holds particular significance for Greece, as it [explicitly](#) states that "*it proposes multiple avenues to forge closer cooperation with... Turkey*," highlighting that coordinated engagement with the neighboring country is "*important*" and that Turkey is "*an EU partner of strategic importance*." At the same time, Greece aims to draw the attention of other member states to regions that have been partly sidelined due to the war in Ukraine, such as the Mediterranean and the Middle East, which directly affect the Union's overall policy agenda (e.g. the war in Gaza and the crisis in the Red Sea).

With regard to preserving quality of life, as a coastal state with a strong shipping and fisheries sector, Greece is [particularly](#) interested in the sustainability of oceans and the management of marine resources, in cooperation with Cyprus and the Cypriot Commissioner responsible. The agricultural sector also remains crucial, especially amid growing pressures. As a predominantly agricultural country, Greece advocates for policies that will support farmers' incomes during this difficult period. Transport is likewise a Greek priority, with an emphasis on safe and sustainable networks, reflected in the country's strong interest in key positions both in the [College of Commissioners](#) and in the [European Parliament](#). In the field of tourism, Greece, as a major tourist destination, looks forward to the European strategy for sustainable tourism, which is expected to include proposals to enhance the sector's resilience and competitiveness. Finally, the housing crisis is becoming one of the most pressing social challenges in Europe. In Greece, it creates a suffocating environment for young people and the middle class, both struggling to cope with [housing costs](#). As a key factor of social cohesion and demographic stability, Athens is keen to see whether the Commission will advance more targeted housing policies, drawing also on EU financial instruments.

All of these political priorities are closely linked to the issue of the new MFF 2028-2034. Greece, holding the Presidency of the Council of the EU in the second half of 2027, will be at the forefront of negotiations that will determine the scope of funding across all the aforementioned policy areas. For Athens, the challenge will be not only to find common ground among member states but also to advance its own priorities.

What Lies Ahead?

The multitude of initiatives launched by the Commission may be welcomed as a sign of dynamism and an eagerness to act across key policy domains. However, the central question is not the announcement of new strategies, but their timely and effective implementation. The shift from theory to practice will ultimately determine the credibility of the institutions and citizens' trust in the Union. In this context, the role of member states becomes pivotal.

Against this backdrop, this year's State of the Union address will not merely be a stock-taking exercise, but rather a "credibility test." The key question will be whether, and to what extent, the Commission can turn its ambitions into concrete action for the Union's collective good. At the same time, the new structure of the Commission will also come under scrutiny. The creation of the two new portfolios for Defense and Space, and for the Mediterranean signals the Union's evolving priorities in critical sectors and regions where its previous contribution and involvement were comparatively limited. Nine months after their establishment, it will be assessed whether these portfolios have delivered on their intended.

Notes

[1] As provided by the Treaties (Article 17 TEU), the European Commission holds the "right of initiative" and is responsible for proposing new EU legislation in policy areas where it has competence. For such proposals to acquire the force of secondary law, they must be adopted either through the ordinary legislative procedure or a special legislative procedure. In parallel, there are non-legally binding acts that serve as documents outlining political direction in specific areas. These carry less weight than legislative acts (which are adopted by the European Parliament and/or the Council of the EU), as they primarily express the Commission's views. Although they emerge following consultations with stakeholders and member states, these may not fully endorse the same positions (or their exact implementation). Strategies, usually framed as "communications" to other institutions, set out the Commission's stance and priorities on specific issues. Action Plans, Pacts, and Roadmaps generally fall into this same category.

[2] In December 2024, the European Parliament established a temporary Special Committee on the Housing Crisis in the EU, [tasked](#) with examining the causes of the current crisis and submitting specific proposals to address it.

[3] In December 2024, the European Parliament decided to create a Special Committee on the European Democracy Shield to assess existing and planned legislation and policies. According to an EPRS [briefing](#), the communication is "*widely expected to be postponed*".

[4] The EU currently [has](#) security and defense partnerships with eight partners (Albania, North Macedonia, the United Kingdom, Japan, Canada, Moldova, Norway, and South Korea).

The new EU defence policies and their impact on the development of the Greek defence industry

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Summary

- The creation of additional fiscal space (NEC) and the provision of low-interest loans (SAFE) under the ReArm Europe initiative will boost both Greece's defense spending and overall demand across the EU for the procurement of weapons systems.
- The Greek defense industry is well-positioned to take advantage of these expanded opportunities due to its integration into pan-European production chains – a legacy of offset agreements from the 1990s and 2000s.
- However, a targeted set of three key policies is required to further strengthen the position of the Greek defense industry in this new environment.
- First, further investment is needed in the government's already active management of publicly controlled defense companies – in particular, by removing the Hellenic Aerospace Industry (HAI) from the constraints imposed by central government oversight.
- Second, the defense procurement framework must be reformed to meet the speed demands of civil-military fusion (CMF). This includes transitioning the role of the Court of Auditors from ex ante to ex post review of defense contracts.
- Third, the Hellenic Center for Defense Innovation (ELKAK) should be strengthened through additional funding and by appointing distinguished scientists from the Greek diaspora to its Board of Directors. This will enable ELKAK to act as a catalyst for the participation of start-ups and diaspora researchers in the effort to build asymmetric capabilities within the Greek defense industry in response to the Turkish threat.

Introduction

In this policy paper, we will assess the impact of the EU's new European defence policies on the Greek defence industry and look at feasible policy options available to the Greek government.

The first chapter will provide an overview of the key new policies in terms of how they impact on defence financing in the EU member states, and in particular on how member states finance their armaments expenditure. The review will include the plan to reallocate Cohesion Fund resources to investments in the defence industry, and the growing importance of military mobility for the EU. The first chapter will end with an examination of how these new policies interact with defence industry decisions in the EU and allied countries, as well as how they mobilize private investment flows into the European defence industry.

In the second chapter, we will correlate these new EU policies with the potential opportunities they open up for the development of the existing Greek defence industry and evaluate their spill-over effects in terms of the capital and know-how they bring to the Greek defence industry, whether it be from domestic sources, other EU member states, or third countries that are Greece's geopolitical allies.

In the third chapter, we will evaluate the potential of and parameters affecting the growth of the current and nascent Greek defence industry in the light of the concept of Civil-Military Fusion (CMF) in the new environment being brought into being by the EU's policies and generalized trends in its member states' defence policies.

In our concluding remarks, we will summarize and synthesize the main conclusions of our analysis.

EU policies on European Defence and their spill-over effects on the European Defence Industry

The two new EU financial instruments are the ReArm Europe programme, namely the National Escape Clause (NEC), and Security Action for Europe (SAFE). The former increases member states' fiscal space with regard to their defence spending by a maximum of 650 billion euros, while the latter provides low-interest loans of up to 150 billion euros to two or more member states that jointly order military equipment¹. We should also include the recent changes to the European Investment Bank's (EIB) financing policy among the new EU financial instruments.² By increasing the allowed percentage dedicated to defence of a dual-use product or service, these changes effectively remove many of the restrictions on EIB financing to defence companies, and in particular on venture capital investments (VCs) in start-ups.

We must also underline the added significance, in view of the above, of the ongoing research and development programmes of the European Defence Fund (EDF), a European Commission body, as well as of the Permanent Structured Cooperation (PESCO), which promotes defence industrial cooperation between EU member states. These programmes,

which conduct R&D scoping of weapons systems and other technologies relevant to the EU's future strategic autonomy, assume added weight in the context of the second Trump Administration, which at best calls into question US assurances regarding the collective defence of Europe, and at worst sets the stage for direct rivalry between the US and the EU. Consequently, the dependencies highlighted by the debate on the reliability of the F35s in the air forces of EU member states, but also of other US weapons systems used by European armed forces, must be reduced to a minimum considering the possibility of a geopolitical rupture with the US³. This can only be done by achieving the autonomy that comes with designing, developing and manufacturing weapons systems within the EU, without dependence on third countries. Which is why the US objected to its exclusion from the PESCO and EDF programmes back in 2019, during the first Trump Administration, due to these programmes' contribution to a future in which the EU could achieve strategic autonomy⁴.

At the same time, the midterm review of the Cohesion Fund, which EU member states were informed of in late July 2025, is aimed *inter alia* at making it possible, by the end of 2025, for member states to choose which domains of increased interest they want to direct unallocated Cohesion Fund amounts into, particularly in the light of developments (i.e. the 2022 invasion of Ukraine by Russia) that have occurred since the Cohesion Fund for 2021-2027 was designed in 2019-2021. These domains include the defence industry and dual-use military mobility, while large companies can also be beneficiaries of these resources, with EU funding of up to 100%. The regulation in question is currently under review and will be published in the autumn of 2025.

It is clear that the growth prospects of the European defence industry, which these policies further enhance, will attract significant investment to EU member states from both third countries and investors within the EU. This has already been taken on board by international portfolio investors, who have tripled the valuations of major listed European defence companies since Russia's invasion of Ukraine⁵. In other words, for both portfolio investors and strategic investors in the European defence sector, the announced NEC and SAFE programmes are a clear indication of—and parameter in—the value of the European defence industry as it emerges out of the sweeping changes in the European and global geopolitical order. It is likely that both classes of investors expect the EU to add further instruments of this sort, given the limitations already demonstrated by NEC. We note that only 16 of the 27 EU member states have made use of the NEC, with large member states such as France and Italy which already have strong defence industries among those that have not. It is therefore reasonable to expect additional measures, such as the creation of a specialized financial mechanism similar to the European Stability Mechanism, or the issuance of Eurobonds to finance foundational projects for common European defence, within the framework provided for by the proposals of the Draghi Commission⁶.

In any case, both these classes of investors take it for granted—given the importance of bolstering the EU's strategic autonomy and the desire of each member state to strengthen its own defence industry, as noted above—that the growing defence spending of each member state individually and of the EU as a whole will mean a commensurable increase in the participation of Europe-based defence industries in the arms orders placed (to the extent, that they will receive the lion's share). This trend is now undeniable, as we can see from the choices made by Germany, which currently has the most ambitious weapons procurement programme in the EU⁷.

Which member countries these investments will be located in will be determined by economic and technical parameters, such as the availability of attractive domestic companies for acquisition, the robustness of the domestic research ecosystem, as well as geopolitical parameters, in which the importance of bilateral relationship will be factored into the choice of where to invest.

EU member state status is extremely important as the EU defence market approaches the size of the USA's, due to increasing national and collective spending in the EU-27. Ever since the aforementioned PESCO and EDF programmes were structured, the EU—and, by extension, major member states—have signalled that third- country companies will not enjoy unconditional access to the favourable terms provided for by the EU financial instruments. In particular, they will have to accept that production will have to take place on European soil, and that the intellectual property and production know-how, generated by the manufacturing of weapon systems, will remain under the ultimate control of the EU and its member states.

Inevitably, the leading American and Israeli defence companies, as well as those of other friendly countries such as India, will do in the EU what their European counterparts, such as EADS and BAE, have done in the US: they will transfer production and innovation capacity to EU member states, such as Greece.

The impact of the new EU policies on the Greek defence industry

Both the NEC and SAFE instruments are helping to increase defence spending in the EU by increasing the demand for defence products and services, especially from the European defence industry. This increase in demand may mean a higher volume of business for the Greek defence industry, due to increased sales to the Greek Armed Forces and/or to the Armed Forces of other member states.

The NEC's creation of additional fiscal space worth €500 million with regard to the country's defence spending is important for the Greek defence industry in terms both of the additional volume of work and the sectoral specialization of this work. The Greek government decided to obtain a €787 million loan from SAFE. The use of these two instruments by the Greek government is warranted, despite the already increased defence spending in relation to the country's GDP, if we take two parameters into account. First, the lack of investment in defence equipment, including in the maintenance of and upgrades to existing equipment, during the almost decade-long fiscal crisis. Second, the fall in Greek GDP, which has resulted in limited defence spending in absolute terms. Thus, Sweden, which will devote 2.4 % of its GDP to defence in 2025, will end up with a defence budget approximately twice the size of Greece⁸.

We recall that the restrictions imposed by Greece's creditors during the debt crisis, coupled with Turkey's direct challenges to Greek sovereign rights, led to an entirely logical preference for 'off-the-shelf' purchases, so as to increase the country's deterrent strength as quickly as possible, which also bolstering Greece's geopolitical alliances as a structural element of that deterrence. However, this choice, though sound considering the unquestionable need to restore Greek deterrence immediately, ended up restricting the Greek defence industry's potential for participation in its armed forces' armament programme. We are referring here to the purchase of Rafales and fighter aircraft and Belharra frigates from France, plus the forthcoming purchases of air defence systems from Israel. Of course, other EU countries did much the same following Russia's invasion of Ukraine, given that they had been under-investing in their own defence industries since the collapse of the Eastern Bloc in 1989. They, too, had thus to seek recourse to the economies of scale and wide product range offered by the US defence industry in particular. Greece's policy choice would also have a future impact, since it reduces the 25 % participation available to the Greek defence industry in arming the Greek Armed Forces, which was recently declared by the Hellenic Ministry of National Defence (MoD), since a significant proportion of its Long-Term Defence Equipment Planning (LTDP) has already been committed to armaments programmes with very little or no Greek industrial participation⁹. Specifically, the Hellenic Defence Industry Association (SEKPY), a body which represents the bulk of Greece's defence manufacturers, has estimated that the participation of the Greek defence industry in the country's significant arms expenditure since the end of the restrictions imposed by Greece's creditors, has not exceeded 5%¹⁰. The sector's total annual sales are in the region of 1.5 billion euros and mainly relate to exports¹¹. We do not have broad-ranging information on the industry, given that the most recent major study is already more than fifteen years old¹². In addition, major defence-focused companies did not promote their activities, due to the potential negative impact on the market value of their parent Groups of the application of ESG (Environmental, Social, Governance) criteria, which had a negative impact on the ability of the defence sector internationally to raise capital.

So our view is that the new financial instruments provide the opportunity, which should be exploited, of the Greek defence industry upping its participation, whether it be in upgrades, which are urgently needed in any case, especially in the Army and the Navy, or in new purchases of weapons systems on the basis of their being co-manufactured by the Greek defence industry.

To give an example, the Army's weapon systems, including tanks, armoured fighting vehicles, self-propelled artillery, multiple rocket launchers and helicopter personnel carriers require upgrades and follow-on support. The upgrading of the large fleets of these weapon systems, and the selective purchase and co-manufacture in Greece of new systems of these types, will enhance the productive and innovative capabilities of the Greek defence industry, bearing in mind that the new upgrades incorporate the lessons learned during the war in Ukraine¹³. In this context, follow-on support agreements, upgrades, and the selective purchase of new systems—with Greek industrial participation—will reinvigorate the industrial partnerships between companies in the Greek defence industry and leading European defence firms, and may thus open up additional avenues for industrial cooperation.

We note that due to the offset agreements included in the major arms programme implemented in the wake of the Imia crisis, despite the corruption that they entailed, Greek defence firms became reliable subcontractors for prime defence contractors in the EU and US. During the years of the fiscal crisis, these subcontractors became entirely export-oriented,

serving as reliable links in international production chains. They are therefore now in a position to participate in upgrades, follow-on support for existing weapon systems, and the co-manufacture of new systems for the Greek Armed Forces.

Indicative Weapon Systems of the Greek Armed Forces that require follow-on support and/or upgrades

Weapon System	Manufacturers
C-27J Spartan transport airplane	Alenia Aeronautica, Leonardo, Alenia Aermacchi, Lockheed Martin
Leopard MBT	Rheinmetall, Krauss Maffei
MEKO Frigates	Blohm + Voss
NH90 AS332 utility military helicopter	Airbus Helicopters, Leonardo, Fokker Aerostructures

Source: publications within the specialized defence press

In this regard, we note that the countries of Central and Eastern Europe, despite having a stronger industrial tradition than Greece, allowed their defence industries to atrophy during the 1990s and 2000s through to 2014, when Russia occupied Crimea. As a result, they were thus not included in pan-European defence industry production chains, unlike the Greek defence sector, which was, thanks to the offset agreements associated with the major arms programme initiated in the wake of the Imia crisis¹⁴. Due to the broad-ranging nature of this armament programme, Greek defence companies are now participants in production chains—and/or have acquired know-how—in, indicatively, the manufacture of tanks, submarines and frigates, fighter aircraft, and surface-to-air missile systems. In all these categories of defence equipment, the entire European defence industry has been engaged in a race to increase the production of—and/or upgrade—the weapon systems in question, or to replace them with new ones¹⁵. And the Greek defence industry is structurally integral to this process.

Indicative purchases of weapon systems that included Greek industrial participation¹⁶

Weapon System	Contribution of the Greek defence industry through off-set agreements	Agreed Date / Date of receipt
10 Mirage 2000 EG upgrade (France)	Mirage configuration 2000-5 Mk2	2007
3 T-214 submarines (Germany)	Assembly and manufacturing in Greece	2006-2009
170 Leopard 2A5 MBTs (Germany)	Production of components	2006-2009
20 NH90 helicopters (France, Germany, Italy)	Production of components	No date available
1100 Stinger portable air defence systems (USA - European Stinger Production Programme)	Production of components	1993-2004
Patriot air defence systems USA	Production of components	2002-2004
30 F16 Block Fighter aircraft USA	Follow-on support	No date available

The importance of this positive exception, since Greek industry in general is only weakly integrated into international production chains, is underscored when we consider that, in the Recovery and Resilience Facility (RRF) programme, Greece is ranked last in terms of the impact on its GDP of demand from other member countries, due to their RRF-funded investments. In contrast, Central and Eastern European member countries lead the way as beneficiaries of the RRF investments of other member countries, which are, of course, fully integrated into pan-European production chains—such as

in the automotive and machinery sectors—with the notable exception of the defence industry prior to the invasion of Ukraine.¹⁷

Turning now to the SAFE programme in particular, ways in which it could potentially form part of the process of integrating the Greek defence industry with that of the Republic of Cyprus, with the participation of other countries in South-Eastern Europe, should be explored. The model in this case are the Nordic countries, and the high degree of industrial and arms coordination they have achieved. Alternatively, further convergence could be pursued with EU countries with which Greece wants to strengthen its cooperation for industrial and defence reasons—primarily with France. In any case, the particularly favourable funding terms provided for by SAFE may release additional Greek fiscal resources for purposes indirectly related to the Greek defence industry. We are mainly referring to the upgrading of the Greek Armed Forces' training and operations—an upgrade that is essential for our defence innovation.

However, a part of the additional fiscal space should also be directed at companies—established or start-ups, either in the defence sector proper, or in the civilian sector with aspirations to enter the defence sector—which are in a position to manufacture purely Greek, high-innovation defence products. As we mentioned above, such Greek companies enjoy ever greater opportunities to finance their innovations, especially through the EIB, which can now invest in Greek VCs, but also through international investors in high-innovation companies in the defence sector. At the same time, the war in Ukraine has shown that, in the space of just three years, new entrants into the defence sector can create conditions that quickly obsolesce the products of decades-old defence industries. The potential for the Greek defence industry not only to regain the ground it has lost to the Turkish defence industry, but to actually outperform it in areas that produce asymmetric deterrent power, is too significant to be ignored. It is therefore possible that the Hellenic Centre for Defence Innovation (ELKAK) can be further bolstered through ReArm—but also by other routes, such as channelling unallocated amounts from the RRF or exploiting new possibilities of the Cohesion Fund.

The MoD must evaluate the portfolio of Greek participations in the EDF and PESCO programmes and identify the most promising on the basis of three criteria: the ability of the Greek defence industry to enter into innovative technologies; the degree to which these participations contribute to the future deterrent power of the Greek Armed Forces; and the degree to which they enhance Greece's position overall in the European collective security structure. This actually constitutes a whole new perspective, whereby participation in these programmes does not function as an indirect subsidy for research personnel and company and research team equipment, but rather as a paramount directive for the strategy adopted by the Greek defence industry. It is encouraging in this respect that the new Greek MoD funding body for defence innovation, the Hellenic Centre for Defence Innovation (HCDI), has taken responsibility for supporting or rejecting funding proposals submitted by Greek entities to the EDF¹⁸.

Regarding the possibility of channelling unallocated amounts from the Cohesion Fund into the defence industry, the Greek side—specifically, the Central Government and interested regional authorities—must act quickly in 2025 to complete the proposals and arrangements required so the funds can be committed for 2026-27. The initial estimate is that the amounts for the whole of Greece for 2026-27 will be in the order of 1-3 billion euros (15% of the 22 billion unallocated from the regional funds).

Since Greece's defence cluster is concentrated in Attica (over 70% of the participations in the EDF, and over 80% at the DEFEA defence exhibition, are by entities based in Attica¹⁹), these resources will have to be directed mainly to Greece's other 12 Regions, in so far as they are home to defence companies (e.g. METLEN in Volos, Prisma in Alexandroupolis, Sunlight in Xanthi) or to research institutes and bodies with some involvement in defence (e.g. Thess Intec).

Also, investing in military mobility in Greece is an opportunity to balance the benefit of increased defence spending in Attica's defence cluster, since military mobility mainly concerns Northern Greece (e.g. the transport hubs of Thessaloniki and Alexandroupolis). Military mobility, as a dual-use policy par excellence, can improve transport infrastructure that is crucial for the international competitiveness of the primary and secondary sectors of the regions of Epirus, Western Macedonia, Central Macedonia, and Eastern Macedonia and Thrace.

Investment flows into the Greek defence industry resulting from EU defence policies

In relation to third countries - with the exception of the UK and the EFTA countries which, being so close to the EU member states both geopolitically and in terms of their values, they can be exempted from the restrictions on participation in EU-

funded armaments - they have every reason to invest in Greece rather than Turkey, despite the greater scope of the Turkish defence industry.

Inevitably, as noted above, the leading American and Israeli defence companies, but also those of other friendly countries such as India, will transfer production and innovative capability to EU member states such as Greece. This could be achieved through acquisitions, as has already happened with the purchase of INTRACOM Defence by Israel's IAI, or through joint ventures, which are often discussed with Lockheed Martin of the US and, more recently, between Israeli companies and the Hellenic Aircraft Industry (EAV). Our dynamic shipbuilding industry also has the potential to attract international partnerships of this kind. Hence the financing provided by a US state development bank for the acquisition of the Syros and Elefsina shipyards²⁰, at a time when the US Navy needs shipbuilding support from shipyards in friendly countries due to the long-term decline in shipbuilding activity in the US itself²¹. The dynamism of our shipbuilding sector is underpinned by the structural synergies that exist between Greece's world-leading commercial shipping and its shipbuilding, marine equipment and start-up entrepreneurship sectors.

And in the case of countries such as Israel, India and the Gulf nations, which is to say countries for whom Turkey is directly or indirectly a strategic rival, investment in the Greek defence industry not only represents access to the growing EU-27 market, it also strengthens an allied nation at the expense of a hostile one.

And, of course, we should not ignore the fact that the financial instruments, and the broader developmental prospects of the European defence industry, act as a powerful catalyst for the inflow of investment into the Greek defence industry, whether from companies in EU member states or Greek companies in the defence industry and related sectors. The state-controlled Hellenic Defence Systems (Ελληνικά Αμυντικά Συστήματα - EAS) has established a joint venture with Czech MSM Export for the production of 155 mm artillery shells. The venture is funded under the EU Act in Support of Ammunition Production (ASAP) to supply these shells to the Ukrainian Armed Forces, and was accompanied by investments by the Czech partner in the EAS production lines²². We note that the Greek-owned ONYX Group has sought to acquire EAS, evidently because it identified the same developmental potential. It is indicative of the Greek defence industry's positive prospects that international as well as domestic strategic investors should be competing to cooperate with what were until recently loss-making state-owned enterprises. Moreover, the positive outlook for the European defence industry has increased the stock market valuations and access to debt financing of leading Greek companies in the defence sector. This inducts them into a virtuous circle, allowing them to either invest in existing operations or embark on acquisitions of other defence companies not only abroad, but also in Greece itself. The first route was chosen by METLEN²³ and the second by the EFA Group, which is now in a position to leverage its subsidiary Theon International's international leadership in the field of night vision instruments to enter other systems linked to the soldier on the battlefield, such as drones²⁴.

Both strategic investors—from Greece, other EU member states and third countries—and portfolio investors are positive about the prospects of the Greek defence industry, given the growth prospects of the European defence industry. Greece's geopolitical identity adds to the attractiveness of the companies in the sector.

We therefore conclude that the Greek government should manage its portfolio of defence companies holistically. That is, it should take all the indicated actions, which include recapitalizations, upgrading the management where required, exiting the centralized payroll regime whereby salaries are determined on the basis of the civil-service pay scale, and set privatization procedures in motion to encourage the injection of valuable capital and know-how. We include Hellenic Aerospace Industry (Ελληνική Αεροπορική Βιομηχανία - EAV) and EAS in this portfolio, but also the Hellenic Vehicle Industry (Ελληνική Βιομηχανία Οχημάτων - ELVO), which was involved in a failed privatization and should perhaps be returned to public control before it is re-privatized, as well as the military clothing and footwear factory. The more holistic and effective the active management of these companies becomes, the more capital and know-how resources these companies will attract, to the benefit of the development of the Greek defence industry. This development will stem from both successfully meeting the 25% participation requirement in the future armaments of the Greek Armed Forces, and from the export opportunities that will arise due to increasing defence spending within the EU.

European policies on defence and beyond, and Civil-Military Fusion (CMF) in Greece

For decades now, the relationship between innovation and defence has largely switched direction, with the civilian sector feeding the military more than vice versa (Civil-Military Fusion - CMF). This trend has prompted a number of policies at EU level focused on supporting the development of dual-use products in critical sectors such as aerospace and IT²⁵. This trend,

which crucially poses a policy challenge that will decide whether the US maintains or loses its military superiority over China, was made clearer still by the Russo-Ukrainian war. Which is to say that analysts attribute the Ukrainian war machine's success in withstanding Russia's greater fire power over the three years of the war to its having created a new defence industry to complement its traditional (Soviet-origin) defence industry. This new industry which has enabled 'the smaller Soviet Army to match the larger Soviet Army' was based on know-how and initiatives of civilian rather than military origin.

Of course, the CMF policy challenge is also relevant to Greece, whose smaller NATO Army is called upon to deter a larger NATO Army (Turkey's), with the added difficulty of Turkey also having a larger defence industry. The defence and economic mission is a common one, since the greater the success of CMF in Greece, the more its deterrent power will be strengthened and the more the international competitiveness of the Greek defence industry will be enhanced. To a significant extent, the armed forces in every European country are basing their upgrade on the means and capabilities that CMF²⁶ will provide them with, even if these means and capabilities do not originate from domestic companies. It is encouraging from this perspective that prominent Greek-owned high-tech and dual-use companies, both start-ups and established businesses, are already supplying the Ministries of Defence of allied countries even before commencing they have become suppliers to the Greek Armed Forces²⁷.

As we see it, know-how enters Greece from three main streams, all of which were largely created by EU financial instruments (including the EIB). With the right policies, these three streams can help advance the Greek version of CMF.

The first stream is the research community, which has acquired a significant portfolio of knowledge and research approaches in dual-use disciplines and policy areas including ICT, aerospace, marine sciences, materials sciences, shipbuilding, civil protection, mobility and logistics. This portfolio has been acquired over close to twenty years, often through collaborations between the research community and Greek and foreign companies in the context of competitive grants which were either co-funded mainly by the cohesion funds and the Greek government or were purely European (through the European Research Council, for example).

However, the Greek research teams in question rely almost exclusively on these competitive projects, which are inherently unpredictable, relatively short-term and—when they are not co-funded—are not based on national priorities. If the teams are to be able to exploit their scientific expertise for CMF purposes, the MoD will need to select the most promising teams in the most promising fields through a competitive process; the winning teams will receive regular funding in five-year cycles.

In addition, the MoD could fund an annual CMF-based open call for the funding of research partnerships between research teams and companies—€500,000 to €1 million each—and the research projects the partnerships propose. This will give rise to research and development in defence products and services that surpass the knowledge available within the Armed Forces. Such a tool would respect the reality that, internationally, the civilian sector (both research and business) has a broader understanding than even the most advanced Armed Forces of what the available dual-use knowledge can contribute to the defence effort. The most promising 10% of these projects could then be given ten times the previous amount in additional funding (€5 to €10 million each) to take the potential defence product or service to the next level of technological readiness.

It is worth noting that the HCDI has already identified 300 Greek companies and research groups through its tendering procedures; this number far exceeds the number of projects it will be awarding on the basis of the needs identified by the Armed Forces themselves²⁸. Thus, with an increase in its budget, the HCDI could accelerate the production of domestic defence innovation, and Greece's ability to generate asymmetric power, through policies such as the one discussed above.

The second stream of know-how that could feed into CMF are the IT companies that have participated in public digitization projects funded mainly by the RRF, along with the technocrats—primarily from the Ministries of Digital Governance and Civil Protection—who designed the relevant tenders and now oversee the projects as they are implemented. Market sources stress that the RRF projects in particular have required the development of dual-use technologies and methods including cybersecurity, data analytics, and artificial intelligence. Since the Ministry of Digital Transformation has been one of the most active in the Ukrainian war effort, we believe that its business-administrative matrix should also be applied at the Hellenic MoD. Companies are already planning their entry into the defence sector,²⁹ but it is necessary to institutionalize the cooperation between the two Ministries (the Ministry of Defence and the Ministry of Digital Governance) for two reasons. Firstly, to attempt to organically link the most relevant Ministry of Digital Governance projects with the Greek defence effort. Second, so that the MoD can take on board the experience acquired by the Ministry of Digital Governance in the awarding of ICT projects, whose requirements include constant and timely updating.

The third stream with regard to the CMF are the (a) US start-ups that have been founded by Greeks and (b) researchers of Greek origin, who may now return to Greece in the light of the Trump Administration's hostility to the US research community. Both of these communities are known entities in Greece, firstly because Greek VCs invest in Greek-interest start-ups abroad so that part of their research and development activity can be transferred to Greece, and secondly because of the shared roots and long-standing collaborations between the Greek research community in Greece and the Greek research community in the US, the latter being composed by individuals born and raised in Greece who have actually received their first degrees from Greek universities.

In terms of start-ups in dual-use or purely defence-related fields, the policies to attract them to Greece hinge on improving the procurement regime at the MoD, as well as on increasing its purchases of high-tech defence products manufactured in Greece. Should these conditions be met, Greek VCs could attract highly innovative start-ups to Greece, since these companies would have the prospect of entering the European defence market with the Greek Armed Forces as their first customer. We note that, to date, VCs have attracted start-ups of this kind to Greece by leveraging the EIB investment funds they manage, based solely on the prospect of those start-ups acquiring good teams of competitively-priced IT engineers, primarily for their research and development activities.

As for the Greek research community in the US, which we assume covers the majority of knowledge fields critical for the defence industry (in aerospace, for instance, 159 Greek scientists are active outside Greece and only 57 in Greece³⁰), we propose that the State rely on national resources to attract them to Greece with the promise of regular funding for their research. Given that scientists of their calibre will enhance the competitiveness of Greek proposals for EU research project funding, attracting them will be beneficial for the country financially. It will be still more beneficial, however, in terms of the scientific know-how they will bring with them, which will allow the Greek defence industry to generate both collective and economic added value.

It is just as important, however, that these additional resources are accompanied by a radically upgraded defence procurement regime. One of the main lessons of the war in Ukraine³¹ is the need to introduce an institutional and administrative procurement environment that is aligned with the inherent speed of CMF: i.e. the integration into military operations of rapidly evolving dual-use technologies.

We note that Greece is the rule and not the exception in the West, and certainly in the EU, in having a lengthy defence equipment procurement process in which transparency and accountability, rather than efficiency, are paramount. This priority was reinforced in the period before the outbreak of the war in Ukraine in Greece by the corruption scandals that dogged the major armament programme post-Imia.

Internationally, this trend is now being reversed, with efficiency now given top priority in a country's defence policy, especially in terms of shortening the time taken for procurement. It is worth referring here to the relevant passage in the recently published UK defence strategy: "Drawing on lessons from the war in Ukraine and enabled by organizational change under Defence Reform, the whole of Defence [of the United Kingdom] ... should be driven by **the logic of the innovation cycle**—able to find, buy, and use innovation, pulling it through from ideas to front line at speed"³². Across Europe, too, it is now accepted that Ukraine can serve as a model for the relationship between armed forces and defence industry, teaching the EU "not only how to invent modern warfare, but how to build a contemporary defence industry"³³.

With regard to the defence procurement regime in particular, apart from introducing any models that may emerge from other EU member states and from the European Commission itself, special attention must be paid to addressing specific systemic problems in Greece, which cover a significant range: from the business world's general lack of confidence in the integrity of Greek public-sector tendering procedures³⁴ to the Court of Audit's old-fashioned practice of conducting a universal ex ante audit of all public contracts above a certain amount, rather than the ex post indicative audit conducted by modern public audit institutions³⁵. Indicatively, in order to address these inherently Greek problems, the HCDI Board could be strengthened with eminent Ivy-League- level scientists from the Greek diaspora, whose travel and accommodation expenses could be covered to allow them to participate in person at Board meetings. Doing so would boost the confidence domestic defence companies have in the integrity of the relevant tenders, and would also send a strong message to innovative Greek-owned foreign companies that Greece's national defence effort highly welcomes their contribution. The Court of Auditors could switch to ex post, rather than ex ante, audits for all Greek public-sector contracts.

Concluding remarks

The EU's defence policies are crucial for the development of the Greek defence industry, as are the secondary impact they have on the flow of investment capital into the defence industry, along with their synergy with other European policies.

If exploited to the full, the additional fiscal space plus cheap borrowing for ReARM joint procurement and the EIB's entry into defence financing, will allow the Greek government to increase the financing of the Greek defence industry. Given the country's broader budgetary constraints, coupled with the need to make initial purchases of cutting-edge weapon systems from allied countries with little Greek industrial participation, there is literally not a euro to waste from the new financial instruments available to Greece. The returns of these additional funds may be of considerable economic, military and geopolitical value, as they can: a) strengthen the position of the Greek defence industry in European defence production chains—a position owed to the major armament programme in the post-Imia period; b) yield economies of scale for our defence industry in cooperation with our geopolitical partners, predominantly the Republic of Cyprus; and c) leverage Greek VCs' networking with Greek-owned high-tech companies abroad.

As we have seen from the developments in the Greek defence industry, while these EU financial instruments increase the size of the European defence market, precisely because they are mainly accessible to companies established in Europe, they also make every company in the defence sector, including those in Greece, attractive investment destinations. For their own shareholders first of all, but with other defence companies close behind—whether they be European or from third countries. The Greek government must therefore urgently and actively manage the portfolio of the state-controlled defence companies, and of EAV in particular, with a view to attracting additional capital to the Greek defence industry which would allow it to grow rapidly.

The Greek defence industry can and should evolve through the leveraging of additional national resources, and through CMF made possible by the dual-use knowledge accumulated over two decades of EU funding for research in Greece via the ERC and Cohesion Funds, and more recently RRF projects, especially in the field of digitization. As we have seen in Ukraine, CMF can create asymmetric military power, rendering the purely military-inspired weapons systems produced by the defence industries of hostile countries ineffective. It also promises to rapidly strengthen Greece's deterrent power against Turkey, thus reversing the long-established situation whereby Turkish revisionism is reinforced by the superiority of the Turkish defence industry to the detriment of Greece.

This national objective also has a predominantly economic dimension, since CMF based, Greek-invented technologies, by definition, are in demand across the entire enlarged European defence market. However, successful Greek CMF will require more than rational national funding of defence research and development, as the country's defence industrial complex must also transcend the systemic obstacles and lack of trust in Greece's defence and public procurement regime. In any case, this is a battle that every EU member-state that wants to see its defence industry acquire a strong position in a single European defence market will have to fight. Meaning that the EU's collective strategic autonomy will emerge through this same competition between member states over which country, in proportion with its size and inherent advantages, will acquire the most supportive national environment—administratively and institutionally—for the production of innovation by its defence industry.

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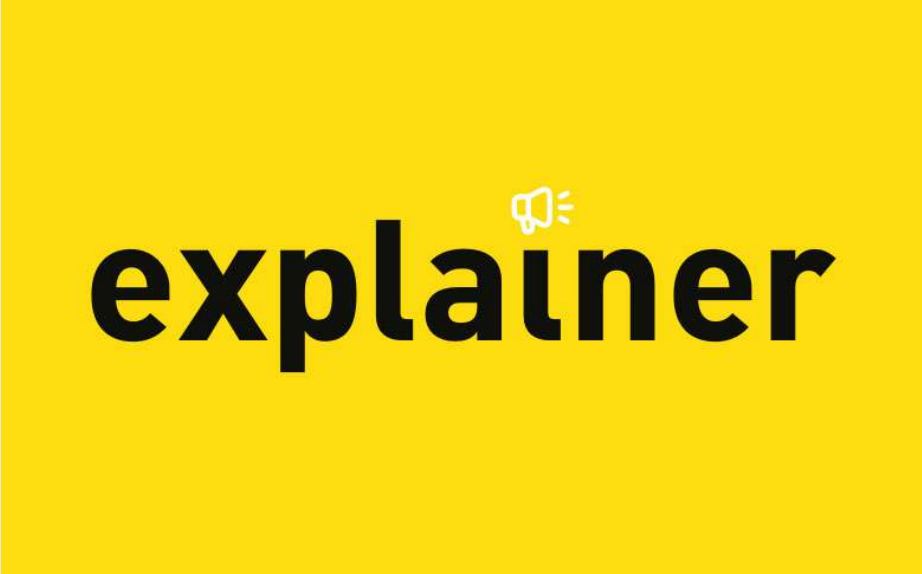
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ELIAMEP Explainer: European defence policy and European defence industrial policy

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explainer

Το παρόν κείμενο αποτελεί συνέχεια του [explainer](#) που δημοσιεύτηκε τον Μάιο του 2025 για τον Κανονισμό SAFE και εντάσσεται σε μία ευρύτερη προσπάθεια χαρτογράφησης των διαφορετικών διαστάσεων της ενωσιακής αμυντικής συνεργασίας. Στόχος του είναι να παρουσιάσει συνοπτικά τις κυριότερες πτυχές της αμυντικής συνεργασίας εντός της ευρωπαϊκής οικογένειας. Αυτές μπορούν να ταξινομηθούν σε δύο βασικές κατηγορίες: την πολιτική άμυνας και την αμυντική βιομηχανική πολιτική. Μία τρίτη κατηγορία περιλαμβάνει δύο υβριδικά εγχειρήματα (Εταιρικές Σχέσεις Ασφάλειας και Άμυνας και Μόνιμη Διαρθρωμένη Συνεργασία στον τομέα της άμυνας), τα οποία συνδυάζουν εν πολλοίς στοιχεία των δύο προαναφερθεισών βασικών κατηγοριών (βλ. Γράφημα Ι). Αξίζει να υπογραμμιστεί ότι το κείμενο περιορίζεται αποκλειστικά και μόνο στις πρωτοβουλίες στο πλαίσιο της ΕΕ, χωρίς να εξετάζει την ευρύτερη αρχιτεκτονική της ευρωπαϊκής ασφάλειας ούτε τις διαστάσεις που αφορούν στη Βορειοατλαντική Συμμαχία ή τις σχέσεις αυτής με την ΕΕ.

Γράφημα Ι: Απεικόνιση των πτυχών της άμυνας της ΕΕ



Α. Πολιτική άμυνας

Α.1. Στρατιωτικές αποστολές και επιχειρήσεις

Σύμφωνα με τα τελευταία δεδομένα, η ΕΕ έχει οκτώ (8) εν εξελίξει στρατιωτικές αποστολές και επιχειρήσεις σε ξηρά και θάλασσα:

- Δύο (2) εξ αυτών αποτελούν στρατιωτικές αποστολές εκπαίδευσης με εντολή την αναδιάρθρωση και την εκπαίδευση των εθνικών Ενόπλων Δυνάμεων (ΕΔ) σε **Σομαλία** (EUTM Somalia) και **Κεντροαφρικανική Δημοκρατία** (EUTM RCA).
- Τέσσερις (4) εξ αυτών είναι στρατιωτικές επιχειρήσεις, με τις οποίες η ΕΕ έχει αναλάβει εντολή με εκτελεστικό χαρακτήρα (executive mandate), ήτοι με δικαίωμα να αναλαμβάνει καθήκοντα που άπτονται της κρατικής κυριαρχίας του εκάστοτε κράτους (π.χ. νηοψίες). Αυτή τη στιγμή, στρατιωτικές/ναυτικές δυνάμεις των κρατών-μελών επιχειρούν υπό ευρωπαϊκή σημαία στη **Βοσνία-Ερζεγοβίνη** (EUFOR ALTHEA), σε μία μεγάλη περιοχή που εκτείνεται από την **Ερυθρά Θάλασσα έως τον Κόλπο και κομμάτι του Ινδικού Ωκεανού** (EUNAVFOR ASPIDES), **στα ανοιχτά της Λιβύης και της ευρύτερης περιοχής** (EUNAVFOR MED IRINI) και στο **Κέρας της Αφρικής και το Δυτικό Ινδικό Ωκεανό** (EUNAVFOR ATALANTA).
- Δύο (2) εξ αυτών αποτελούν αποστολές για στρατιωτική συνδρομή και την ενίσχυση των εθνικών ΕΔ: σε **Ουκρανία** (EUMAM Ukraine) και **Μοζαμβίκη** (EUMAM Mozambique).

Παράλληλα, υφίστανται δύο πρωτοβουλίες που επιδιώκουν να συνδυάσουν την **πολιτικο-στρατιωτική διάσταση**: το EU RACC SAHEL (συμβουλευτικό και συντονιστικό κέντρο για το Σαχέλ) και η EU SDI GOG (προς υποστήριξη των δυτικοαφρικανικών χωρών στον Κόλπο της Γουινέας, σε συνεργασία με την Ακτή Ελεφαντοστού, την Γκάνα, το Τόγκο και το Μπενίν).

Επί τη βάση των συμφωνηθέντων στη Στρατηγική Πυξίδα, η **Στρατιωτική Δυνατότητα Σχεδίασης και Διεξαγωγής Επιχειρήσεων (MPCC)** αποτελεί την προτιμώμενη στρατιωτική δομή διοίκησης και ελέγχου (C2) για τους Σχηματισμούς Μάχης της ΕΕ (EU Battlegroups) και τη Δυνατότητα Ταχείας Ανάπτυξης (EU RDC) της ΕΕ. Είναι, πλέον, σε θέση να σχεδιάζει και να διεξάγει α) το σύνολο των μη εκτελεστικών στρατιωτικών αποστολών, β) δύο στρατιωτικές επιχειρήσεις μικρής κλίμακας ή μία επιχείρηση μέσης κλίμακας με εκτελεστική εντολή, και γ) στρατιωτικές ασκήσεις.

Α.2. Ευρωπαϊκός Μηχανισμός για την Ειρήνη (EPF)

Το 2021, το Συμβούλιο αποφάσισε την ίδρυση του EPF, το οποίο αντικατέστησε προηγούμενες σχετικές πρωτοβουλίες, ήτοι τον Μηχανισμό «Αθηνά» και το Μέσο Στήριξης της Ειρήνης στην Αφρική. Πρόκειται για έναν Μηχανισμό που χρηματοδοτείται από εθνικές συνεισφορές (επί τη βάση του Ακαθάριστου Εθνικού Εισοδήματος), καθώς το Άρθρο [41\(2\)](#)

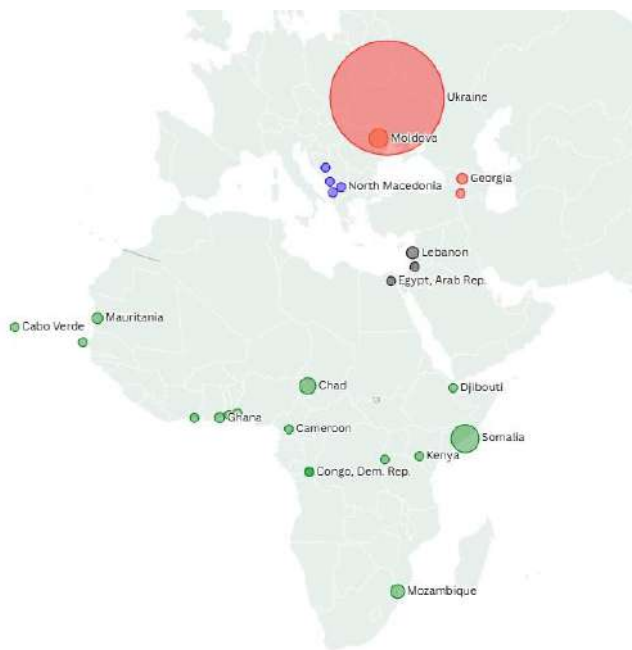
ΣΕΕ απαγορεύει τη χρήση ενωσιακών πόρων για δαπάνες «που οφείλονται σε ενέργειες που έχουν στρατιωτικές συνέπειες ή συνέπειες στην άμυνα».

Το EPF διαρθρώνεται σε **δύο πυλώνες**:

1. Πυλώνας επιχειρήσεων: Καλύπτει τις κοινές δαπάνες των στρατιωτικών αποστολών και των επιχειρήσεων στο πλαίσιο της ΚΠΑΑ, και
2. Πυλώνας μέτρων συνδρομής: Χρηματοδοτεί τρίτα κράτη, καθώς και περιφερειακούς και διεθνείς οργανισμούς για την α) ενίσχυση των στρατιωτικών και αμυντικών δυνατοτήτων, και β) στήριξη των στρατιωτικών πτυχών των επιχειρήσεων υποστήριξης της ειρήνης.

Όταν ιδρύθηκε, είχε προϋπολογισμό περίπου 5,69 δις. Ευρώ σε τρέχουσες τιμές. Λόγω της ανάγκης στήριξης της Ουκρανίας, τα κράτη-μέλη έχουν προβεί σε διαδοχικές αυξήσεις του χρηματοδοτικού ανωτάτου ορίου (Μάρτιος 2023, Ιούνιος 2023, Μάρτιος 2024). Σήμερα, το όριο αυτό ανέρχεται σε **17 δις. Ευρώ**. Ωστόσο, η Ουγγαρία, εκμεταλλευόμενη την αρχή της ομοφωνίας επί τη βάσει της οποίας λαμβάνονται οι αποφάσεις στην Επιτροπή EPF του Συμβουλίου, δεν συναινεί με το 8^ο πακέτο στήριξης της Ουκρανίας (ύψους 500 εκατ. Ευρώ) από το 2023, οδηγώντας στη μερική αδρανοποίηση των πακέτων στήριξης της Ουκρανίας μέσω του EPF. Παράλληλα, οι αποζημιώσεις για τη μεταφορά εξοπλισμού μέσω του Μηχανισμού δίδονται με καθυστέρηση ενός (1) έτους. Τα δύο αυτά κωλύματα υπονομεύουν την προστιθέμενη αξία του EPF ως το κύριο ενωσιακό μέσο στρατιωτικής στήριξης της Ουκρανίας. Όπως φαίνεται από το Γράφημα II, μέτρα συνδρομής έχουν συμφωνηθεί για μία πληθώρα τρίτων κρατών σε Δυτικά Βαλκάνια, Ανατολική Ευρώπη, Μέση Ανατολή και Αφρική.

Γράφημα II: Μέτρα Συνδρομής μέσω του EPF (διαδραστική έκδοση)



Δημιουργήθηκε με [Flourish.studio](https://www.flourish.studio). Πηγή: Συμβούλιο της ΕΕ (2025)¹

A.3. Ικανότητα Ταχείας Ανάπτυξης (RDC)

Επί τη βάσει των συμφωνηθέντων στη Στρατηγική Πυξίδα, η Ικανότητα Ταχείας Ανάπτυξης (RDC) επέτυχε πλήρη επιχειρησιακή δυνατότητα το 2025. Αποτελείται από **Σχηματισμούς Μάχης της ΕΕ** (EU Battlegroups) και **εθνικές στρατιωτικές μονάδες, συμπεριλαμβανομένων στρατηγικών ενεργοποιητών** (λ.χ. αερομεταφορές, ιατρικές μονάδες, συλλογή πληροφοριών, επιτήρηση και αναγνώριση κλπ.), γεγονός που τη διαφοροποιεί σημαντικά από τους εν μέρει αδρανοποιημένους Σχηματισμούς Μάχης. Επιπροσθέτως, ειδοποιός διαφορά είναι το μέγεθος και το είδος της δύναμης που δύναται να αναπτυχθεί για πλήθος αποστολών (π.χ. διάσωση και εκκένωση, ανθρωπιστική βοήθεια, επιβολή ειρήνης κλπ.), καθώς το πρώτο πλέον ανέρχεται σε **5.000 άτομα** (επίπεδο ταξιαρχίας εν αντιθέσει με τους Σχηματισμούς Μάχης που λειτουργούν σε επίπεδο τάγματος) και το δεύτερο περιλαμβάνει προσωπικό από **όλους τους κλάδους των ΕΔ** (ήτοι ΣΞ, ΠΝ, ΠΑ). Παράλληλα, βρίσκονται σε επιφυλακή για 12 μήνες (αντί για 6). Η Ικανότητα Ταχείας Ανάπτυξης ακολουθεί,

λοιπόν, τη λογική των Σχηματισμών Μάχης, αλλά κρίνεται ως πιο γρήγορη, ευπροσάρμοστη και ικανή να απαντήσει σε διάφορες κρίσεις εκτός των συνόρων της ΕΕ. Προς επίτευξη του απαραίτητου βαθμού ετοιμότητας, διεξάγονται πραγματικές στρατιωτικές ασκήσεις στο ενωσιακό επίπεδο. Η τρίτη ευρωπαϊκή άσκηση διεξήχθη τον Απρίλιο του 2025.

Ωστόσο, απαραίτητη προϋπόθεση για την ενεργοποίησή της παραμένει η ομοφωνία των κρατών-μελών, γεγονός που επηρεάζει την αποτελεσματικότητά της και αναπαράγει εν μέρει τις [παθογένειες](#) των Σχηματισμών Μάχης. Αν και το EPF χρηματοδοτεί πλέον μεγαλύτερο μέρος των κοινών εξόδων, καθιστώντας την ανάπτυξή της στο πεδίο περισσότερο ελκυστική (ή λιγότερο απαγορευτική), η πολιτική βούληση για επιχειρησιακή αξιοποίηση δεν πρέπει να θεωρείται δεδομένη. Επιπλέον, σύμφωνα με την αρχή του “single set of forces” που διέπει τη συνεργασία ανάμεσα σε ΕΕ και ΝΑΤΟ, τα κοινά κράτη-μέλη των δύο οργανισμών δε διαθέτουν ξεχωριστές ΕΔ για τον κάθε οργανισμό. Συνεπώς, πρέπει να γίνει μία στρατηγική επιλογή σχετικά με το ποια από τις δύο αρχιτεκτονικές θα προκρίνεται στην πράξη (και στο πεδίο).

A.4. Εταιρικές Σχέσεις Ασφάλειας και Άμυνας (SDPs)

Ένα νέο μοντέλο εταιρικών σχέσεων για την ασφάλεια και την άμυνα παρουσιάστηκε μετά την υιοθέτηση της Στρατηγικής Πυξίδας, προκειμένου να αναβαθμιστεί η συνεργασία με τρίτα κράτη στον εν λόγω τομέα. Μέχρι σήμερα, η ΕΕ έχει υπογράψει **οκτώ (8) εταιρικές σχέσεις** με Νορβηγία, Μολδαβία, Νότιο Κορέα, Ιαπωνία, Αλβανία, Βόρειο Μακεδονία, Ηνωμένο Βασίλειο και Καναδά. Καίτοι το περιεχόμενο των εταιρικών σχέσεων **διαφοροποιείται ανάλογα με τις ανάγκες και τις δυνατότητες του κάθε εταίρου**, ορισμένοι τομείς συνεργασίας είναι κοινοί (π.χ. κυβερνοασφάλεια, υβριδικές απειλές, εκπαίδευση, διαβουλεύσεις για σχετικές αμυντικές πρωτοβουλίες, ατζέντα για «Γυναίκες, Ειρήνη και Ασφάλεια κλπ»). Όλες οι εταιρικές σχέσεις περιλαμβάνουν ρήτρα αναθεώρησης του περιεχόμενου «όπως κρίνεται σκόπιμο», επιτρέποντας προσαρμογές που ενδέχεται να εξαρτώνται από την πρόοδο που έχει σημειωθεί, καθώς και από πιθανές νέες εξελίξεις ή προτεραιότητες. Η ΕΥΕΔ είναι αρμόδια για τη διαπραγμάτευση και σύναψη των εταιρικών σχέσεων, αφού προηγουμένως έχει προηγηθεί η εξουσιοδότηση από την Επιτροπή Πολιτικής και Ασφαλείας. Εκ μέρους της ΕΕ, υπογράφονται από τον ΥΕ/ΑΕ. **Συνδέονται, πλέον, άμεσα με την εφαρμογή του Κανονισμού SAFE** (βλ. Β.5.), καθώς η σύναψη μίας τέτοιας εταιρικής σχέσης αποτελεί απαραίτητη, αλλά όχι επαρκή προϋπόθεση για τη συμμετοχή της αμυντικής βιομηχανίας τρίτων κρατών (πλην Ουκρανίας και μελών ΕΟΧ-ΕΖΕΣ², προσχωρουσών, υποψηφίων προς ένταξη ή εν δυνάμει υποψηφίων προς ένταξη χωρών) στην κοινή προμήθεια. Λόγω αυτού, αλλά και εξαιτίας των διατάξεων που περιλαμβάνονται σε ορισμένες εταιρικές σχέσεις σχετικά με στενότερη αμυντική βιομηχανική συνεργασία, οι εν λόγω συμφωνίες δεν περιορίζονται αποκλειστικά στην πολιτική άμυνας, αλλά αγγίζουν και τη διάσταση της αμυντικής βιομηχανικής πολιτικής.

Β. Αμυντική βιομηχανική πολιτική

Β.1. Μόνιμη Διαρθρωμένη Συνεργασία στον τομέα της άμυνας (PESCO)

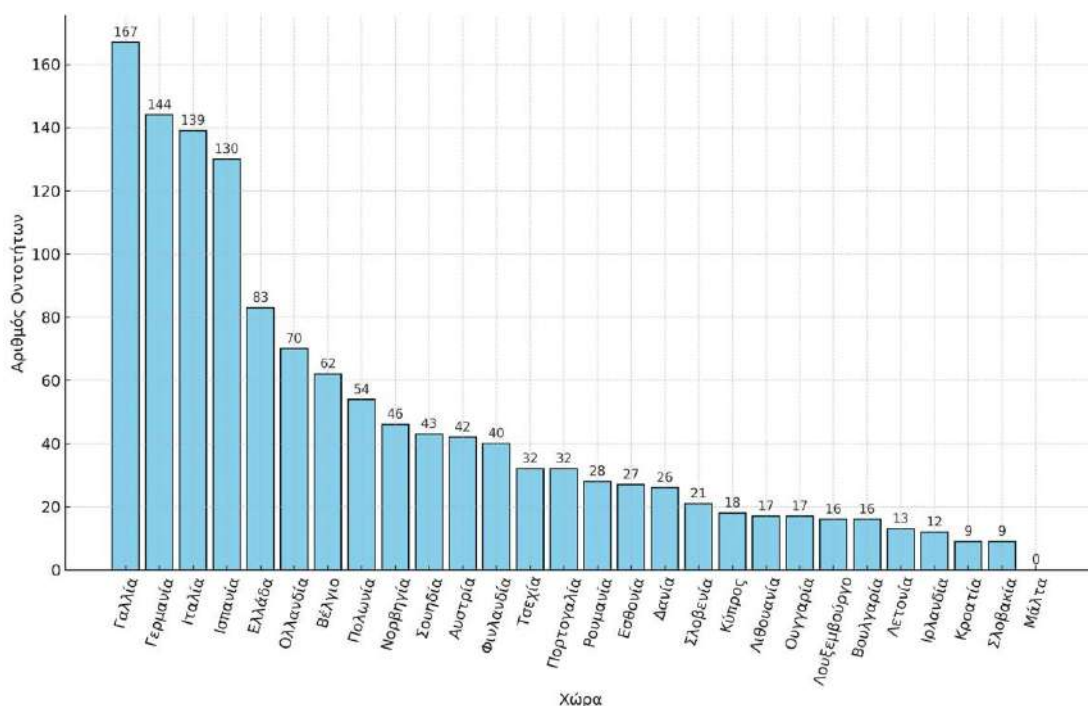
Η ενεργοποίηση της PESCO ήταν δυνατή από το 2009, οπότε και τέθηκε σε ισχύ η Συνθήκη της Λισαβόνας. Ωστόσο, χρειάστηκε να περάσουν οκτώ (8) έτη, κατά τη διάρκεια των οποίων αποφασίστηκε η έξοδος του Ηνωμένου Βασιλείου από την ΕΕ, μέχρι να ενεργοποιηθεί. Προς το παρόν, συμμετέχουν όλα τα κράτη-μέλη, πλην της Μάλτας. Τα συμμετέχοντα κράτη-μέλη συμφωνούν σε πέντε βασικές, νομικά δεσμευτικές υποχρεώσεις: α) αύξηση των αμυντικών επενδύσεων (20% επί των συνολικών στρατιωτικών δαπανών τους), β) κοινό αμυντικό πλαίσιο (εναρμονισμένες απαιτήσεις και πρότυπα για έργα ανάπτυξης δυνατοτήτων), γ) ενισχυμένη διαλειτουργικότητα, ευελιξία και δυνατότητα ανάπτυξης των ΕΔ, δ) στενότερη συνεργασία, και ε) κοινή ανάπτυξη εξοπλιστικών προγραμμάτων υπό την αιγίδα του Ευρωπαϊκού Οργανισμού Άμυνας. Η αρχιτεκτονική της PESCO βασίζεται σε επιμέρους έργα, ο αριθμός των οποίων ανέρχεται σήμερα σε 75, με το καθένα από αυτά να παρουσιάζει διαφορετικό βαθμό ουσιαστικής προόδου. Κάθε έργο ταξινομείται σε μία εκ των επτά (7) θεματικών κατηγοριών. Πέραν του εξοπλιστικού τομέα, η PESCO ενσωματώνει και μια πιο επιχειρησιακή διάσταση, καθώς περιλαμβάνει και εκπαιδευτικά έργα, όπως είναι το [Κέντρο Ιατρικής Εκπαίδευσης Ειδικών Δυνάμεων](#) ή η [Εκπαίδευση Χειριστών Ελικoptέρων σε Hot and High Περιβάλλον](#), τα οποία διευρύνουν το αντικείμενο συνεργασίας και πέρα από τις αμιγώς βιομηχανικές πτυχές. Η Ελλάδα συμμετέχει σε [δεκαεπτά](#) (17) έργα αυτή τη στιγμή, ούσα συντονίστρια-χώρα για έξι (6) εξ αυτών. Είναι σημαντικό να αναφερθεί ότι η ελληνική δραστηριοποίηση δεν περιορίζεται μόνο σε έργα που άπτονται των ναυτικών δυνατοτήτων (π.χ. Θαλάσσια Αυτόνομα Συστήματα για αντίμετρα κατά των ναρκών, Λιμενική και Θαλάσσια Επιτήρηση και Προστασία, Αναβάθμιση της Θαλάσσιας Επιτήρησης, Ευρωπαϊκή Κορβέτα Περιπολίας), αλλά υπάρχει δραστηριότητα και σε πλήθος άλλων θεματικών (π.χ. Στρατιωτική Κινητικότητα, Τεθωρακισμένα Οχήματα Πεζικού/Αμφίβια Οχήματα Επίθεσης/Ελαφρά Τεθωρακισμένα Οχήματα, Δίκτυο Logistics Hubs στην Ευρώπη και υποστήριξη επιχειρήσεων, Πλατφόρμα Ανταλλαγής Πληροφοριών για την Αντιμετώπιση Κυβερνοαπειλών και Συμβάντων).

Η ικανότητα της PESCO να παράξει απτά αποτελέσματα έχει αμφισβητηθεί εντόνως και πολλάκις. Η λογική της είναι πλήρως διακυβερνητική, με τα κράτη-μέλη να έχουν τα ηνία επί της διαδικασίας. Δύνανται να συμμετάσχουν καιτρίτα κράτη, έπειτα από σχετική απόφαση των συμμετεχόντων κρατών-μελών στο Συμβούλιο. Επί παραδείγματι, λόγω της σημασίας της στρατιωτικής κινητικότητας για τη Γηραιά Ήπειρο και τη διατλαντική ασφάλεια, στο σχετικό έργο συμμετέχουν οι ΗΠΑ, ο Καναδάς και η Νορβηγία, ενώ έχει προσκληθεί το Ηνωμένο Βασίλειο.

B.2. Ευρωπαϊκό Ταμείο Άμυνας (EDF)

Το Ευρωπαϊκό Ταμείο Άμυνας υποστηρίζει νομικές οντότητες των κρατών-μελών (και της Νορβηγίας και, από το 2025, της Ουκρανίας) να συμμετάσχουν σε **συνεργατικά (επί τη βάσει κοινοπραξιών) αμυντικά έργα έρευνας και ανάπτυξης**, προκειμένου να ενισχυθεί η ανταγωνιστικότητα της ευρωπαϊκής αμυντικής βιομηχανίας. Το Ταμείο διαθέτει προϋπολογισμό σχεδόν **7,3 δις. Ευρώ** για το τρέχον Πολυετές Δημοσιονομικό Πλαίσιο, που εκπνέει το 2027, εκ των οποίων 2,7 δις. Ευρώ κατευθύνονται για έρευνα και 5,3 δις. Ευρώ για ανάπτυξη δυνατοτήτων. Η οικονομική στήριξη παρέχεται κυρίως μέσω επιχορηγήσεων που δύνανται να καλύψουν έως και το 100% των επιλέξιμων δαπανών, ενώ εφαρμόζεται και σύστημα “bonus” που λαμβάνει υπ’ όψιν τη συμμετοχή μικρομεσαίων επιχειρήσεων (SMEs), επιχειρήσεων μεσαίας κεφαλαιοποίησης (mid-caps) και τη διασύνδεση με έργα PESCO (βλ. Β.1.). Για τη χρηματοδότηση ενός συνεργατικού έργου, απαιτείται καταρχήν η συμμετοχή τουλάχιστον τριών (3) νομικών οντοτήτων από τρία (3) διαφορετικά κράτη-μέλη (ή Νορβηγία ή Ουκρανία), ενώ υφίστανται **αυστηρότατες προϋποθέσεις που άπτονται του de jure και de facto ελέγχου των νομικών οντοτήτων** (π.χ. πραγματικός έλεγχος μίας οντότητας από άλλη οντότητα που συμμετέχει στην κοινοπραξία ή πραγματικός έλεγχος από νομική οντότητα τρίτου κράτους). Στην αρχή κάθε ημερολογιακού έτους δημοσιεύεται το ετήσιο πρόγραμμα εργασίας, το οποίο περιλαμβάνει το ύψος της συνολικής χρηματοδότησης, τις επιλέξιμες κατηγορίες έρευνας και ανάπτυξης (λ.χ. δρόνοι ή συστήματα αεράμυνας), και το μέγιστο ύψος χρηματοδότησης ανάκατηγορία. Το πρόγραμμα εργασίας για το 2025 έχει προϋπολογισμό ύψους 1,065 δις. Ευρώ. Μέχρι και το 2024, δεν υπήρχε ουδεμία συμμετοχή από νομική οντότητα προερχόμενη από τη Μάλτα (βλ. Γράφημα III).

Γράφημα III: Αριθμός οντοτήτων ανά χώρα στο Ευρωπαϊκό Ταμείο Άμυνας (2021-2024)



Πηγή: Fiott (2025)

B.3. Ευρωπαϊκή Αμυντική Βιομηχανική Στρατηγική (EDIS)

Η Ευρωπαϊκή Αμυντική Βιομηχανική Στρατηγική (EDIS) αποτελεί πρωτοβουλία της Επιτροπής και του ΥΕ/ΑΕ με απώτερο σκοπό την **ενίσχυση της ανταγωνιστικότητας και της ετοιμότητας της ευρωπαϊκής βιομηχανικής και τεχνολογικής αμυντικής βάσης**. Ανακοινώθηκε τον Μάρτιο του 2024 και βασίστηκε εν πολλοίς στη [Διακήρυξη των Βερσαλλιών](#) του Μαρτίου του 2022. Στο πλαίσιο αυτό, στοχεύει στην α) αύξηση της αμυντικής συνεργασίας, β) ενίσχυση της ανταγωνιστικότητας, γ) ενίσχυση της ασφάλειας εφοδιασμού και μείωση των εξαρτήσεων από τρίτα κράτη, δ) προώθηση της αμυντικής καινοτομίας, και ε) ενσωμάτωση της «κουλτούρας ετοιμότητας» στο σύνολο των ενωσιακών πολιτικών (βλ. την εκδοθείσα το Μάρτιο του 2025 [Στρατηγική για την Ένωση Ετοιμότητας](#)). Για να επιτευχθούν οι προαναφερθέντες στόχοι, προτείνει, μεταξύ άλλων, την α) ενίσχυση της συνεργατικής προμήθειας αμυντικού εξοπλισμού, β) δημιουργία ενός ευρωπαϊκού μηχανισμού πωλήσεων αμυντικού εξοπλισμού, γ) ενίσχυση της βιομηχανικής συνεργασίας με την Ουκρανία, και δ) δημιουργία του Ευρωπαϊκού Προγράμματος Αμυντικής Βιομηχανίας, με προτεινόμενο προϋπολογισμό ύψους 1,5 δις. Ευρώ για κοινή προμήθεια και ανάπτυξη αμυντικού εξοπλισμού.

B.4. Πρόγραμμα για την Ευρωπαϊκή Αμυντική Βιομηχανία (EDIP)

Το Πρόγραμμα για την Ευρωπαϊκή Αμυντική Βιομηχανία (EDIP) προτάθηκε με την EDIS τον Μάρτιο του 2024 (βλ. ανωτέρω) και στοχεύει να λειτουργήσει ως «**γέφυρα**» **μεταξύ βραχυπρόθεσμων εργαλείων** (που έχουν πλέον λήξει), όπως το EDIRPA (για την κοινή προμήθεια αμυντικού εξοπλισμού) και το ASAP (για την ταχεία παραγωγή εξοπλισμού αναγκαίου για την Ουκρανία). Αναμένεται να προσφέρει **1,5 δις. Ευρώ** από τον τρέχοντα ενωσιακό προϋπολογισμό μέχρι το 2027. Δικαιούχοι δύνανται να είναι νομικές οντότητες από κράτη-μέλη, συνδεδεμένες χώρες (π.χ. Νορβηγία) και την Ουκρανία. Η [νομοθετική διαδικασία](#) ξεκίνησε το Νοέμβριο του 2024 (τότε AFET & ITRE, τώρα SEDE & ITRE). Τον Μάρτιο του 2025 ζητήθηκε να ενεργοποιηθεί η επείγουσα διαδικασία από μία πολιτική ομάδα του Ευρωπαϊκού Κοινοβουλίου. Τον Απρίλιο του 2025, οι δύο αρμόδιες επιτροπές συμφώνησαν στο προσχέδιο του EDIP. **Τον Ιούνιο του 2025, το Συμβούλιο υιοθέτησε διαπραγματευτική εντολή** για συνομιλίες με το Ευρωπαϊκό Κοινοβούλιο, προτείνοντας 300 εκατ. Ευρώ να κατευθυνθούν προς το [Μέσο Διευκόλυνσης για την Ουκρανία](#)³. Το Συμβούλιο υπογραμμίζει την ανάγκη θέσπισης ανωτάτου ορίου για τη χρήση εξαρτημάτων από τρίτες χώρες στο ποσοστό του 35%. Επιπροσθέτως, προτείνεται η δημιουργία α) μιας Δομής για το ευρωπαϊκό πρόγραμμα εξοπλισμών, ήτοι ενός εθελοντικού νομικού πλαισίου για την προώθηση της μακροπρόθεσμης συνεργασίας μεταξύ των κρατών-μελών για όλη τη διάρκεια του κύκλου ζωής ενός προϊόντος, και β) ενός καθεστώτος ασφάλειας εφοδιασμού στον τομέα της άμυνας και ενός συμβουλίου ασφάλειας του εφοδιασμού στον τομέα της άμυνας, απαρτιζόμενο από τα κράτη-μέλη, την Επιτροπή, τον ΥΕ/ΑΕ και τον Ευρωπαϊκό Οργανισμό Άμυνας. **Οι διαπραγματεύσεις μεταξύ των εμπλεκόμενων θεσμικών οργάνων (τρίλογος) είναι εν εξελίξει.**

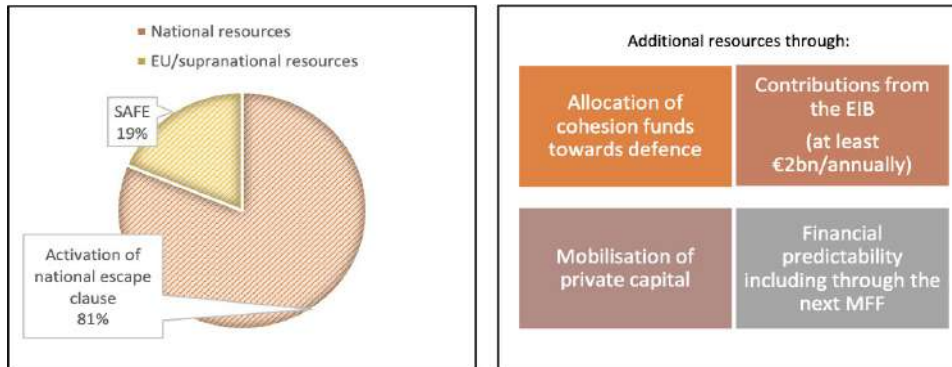
B.5. Λευκή Βίβλος, Σχέδιο Επανεξοπλισμού της Ευρώπης και SAFE

Η **Λευκή Βίβλος για το Μέλλον της Ευρωπαϊκής Άμυνας**, η οποία δημοσιεύθηκε τον Μάρτιο του 2025, αποτελεί μια πρωτοβουλία ορόσημο της Ευρωπαϊκής Επιτροπής για τη διαμόρφωση μιας συνεκτικής στρατηγικής για την ενίσχυση της άμυνας της ΕΕ, εν μέσω αυξανόμενης γεωπολιτικής αστάθειας. Λειτουργώντας ως πλαίσιο για το σχέδιο επανεξοπλισμού της Ευρώπης, προτείνει την κατεύθυνση εκατοντάδων δισεκατομμυρίων ευρώ σε αμυντικές επενδύσεις, μέσω αξιοποίησης εθνικών και ευρωπαϊκών πόρων. Το Σχέδιο Επανεξοπλισμού της Ευρώπης προτείνει την κινητοποίηση εθνικών πόρων ύψους έως 650 δις. Ευρώ, μέσω της **ενεργοποίησης της εθνικής ρήτηρας διαφυγής** του Συμφώνου Σταθερότητας και Ανάπτυξης, επιτρέποντας στα ενδιαφερόμενα κράτη-μέλη να αυξήσουν τις αμυντικές τους δαπάνες (COFOG-02⁴) πέρα από τα συνήθη όρια (παραγκωνίζοντας έως έναν βαθμό τον περιορισμό των ελλειμμάτων και του δημοσίου χρέους). Σε αυτά τα 650 δις. Ευρώ προστίθενται 150 δις. Ευρώ, που θα συγκεντρωθούν μέσω της κοινής έκδοσης ομολόγων στο όνομα της Ένωσης, όπως προβλέπεται από τον **Κανονισμό SAFE** (Security Action for Europe), ο οποίος υιοθετήθηκε τον Μάιο του 2025. Εκτός από τα συνολικά 800 δις. Ευρώ, η Λευκή Βίβλος προτείνει **τέσσερις επιπλέον τρόπους αύξησης των αμυντικών δαπανών**: α) ανακατεύθυνση των υφιστάμενων ενωσιακών πόρων προς την άμυνα (βλ. πρόσφατη [απόφαση](#) για τροποποίηση των Κανονισμών 2021/1058 και 2021/1056 και ανακατεύθυνση πόρων συνοχής προς την άμυνα), β) (δανειακές) συνεισφορές από την Ευρωπαϊκή Τράπεζα Επενδύσεων, ύψους τουλάχιστον 2 δις. Ευρώ κατ' έτος, γ) κινητοποίηση ιδιωτικού κεφαλαίου, και δ) διασφάλιση χρηματοοικονομικής προβλεψιμότητας για την ευρωπαϊκή αμυντική βιομηχανία στο επόμενο Πολυετές Δημοσιονομικό Πλαίσιο (βλ. Γράφημα IV)

Πρόταση της Λευκής Βίβλου (αλλά και της EDIS και της Έκθεσης Ντράγκι) και άξια αναφοράς είναι η ανάγκη για αναγνώριση από τα κράτη-μέλη των **Ευρωπαϊκών Αμυντικών Έργων Κοινού Ενδιαφέροντος** (European Defence Projects

of Common Interest), στα οποία πρέπει να επικεντρωθούν οι πόροι. Η EDIS ρητά αναφέρει ότι τα εν λόγω έργα δύνανται να περιλαμβάνουν δυνατότητες για αεράμυνα και αντι-πυραυλική άμυνα, space-domain awareness, δίκτυο ικανοτήτων κυβερνοάμυνας και ναυτικά και υποβρύχια μέσα προστασίας.

Γράφημα IV: Λευκή Βίβλος: νέοι πόροι για την άμυνα της ΕΕ

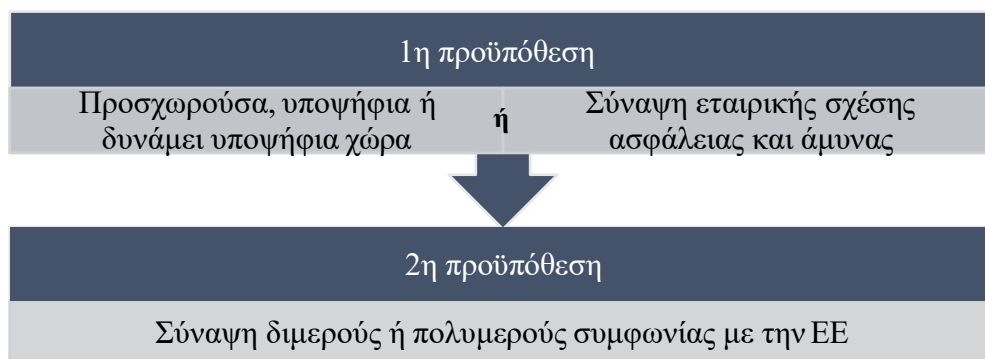


Πηγή: Μπλαβούκος & Πολίτης Λάμπρου (2025, ΕΛΙΑΜΕΠ)

Όσον αφορά τον Κανονισμό SAFE, εντάσσεται στο ευρύτερο σχέδιο επανεξοπλισμού της Ευρώπης συνολικής αξίας 800 δις. Ευρώ. Τα κονδύλια του SAFE θα συγκεντρωθούν μέσω δανεισμού, της Ευρωπαϊκής Επιτροπής από κεφαλαιαγορές ή χρηματοπιστωτικά ιδρύματα, εξ ονόματος της ΕΕ, προκειμένου όπως αυτά κατευθυνθούν, **υπό τη μορφή (χαμηλότοκων και με μακρά περίοδο αποπληρωμής) δανείων**, στα κράτη-μέλη (όπως και την Ουκρανία και μέλη ΕΟΧ-ΕΖΕΣ) για κοινή προμήθεια συγκεκριμένων κατηγοριών αμυντικού εξοπλισμού. Σύμφωνα με τον Κανονισμό, η έγκριση των πληρωμών προς τα κράτη-μέλη δύναται να πραγματοποιηθεί έως και το 2030. Σύμφωνα με την [ανακοίνωση](#) της Επιτροπής, στο πλαίσιο του SAFE, **η Ελλάδα αναμένεται να λάβει δάνειο ύψους 787,66 εκατ. Ευρώ**. Ο Κανονισμός χρησιμοποιεί ως κύρια νομική βάση το Άρθρο 122 της Συνθήκης για τη Λειτουργία της ΕΕ (ΣΛΕΕ), το οποίο εφαρμόζεται σε έκτακτες καταστάσεις και επιτρέπει στο Συμβούλιο, έπειτα από πρόταση της Επιτροπής, να παρέχει χρηματοδοτική ενίσχυση σε κράτος-μέλος που «αντιμετωπίζει δυσκολίες ή διατρέχει μεγάλο κίνδυνο να αντιμετωπίσει σοβαρές δυσκολίες». Με αυτόν τον τρόπο και τη συγκεκριμένη νομοθετική βάση, ωστόσο, παραγκωνίζεται το Ευρωπαϊκό Κοινοβούλιο, καθώς δεν ισχύει η συνήθης νομοθετική διαδικασία που το εμπλέκει ως ισότιμο νομοθέτη, ενώ οι αποφάσεις λαμβάνονται στο Συμβούλιο Υπουργών με ειδική πλειοψηφία, αφαιρώντας από τα κράτη-μέλη το δικαίωμα της αρνησικυρίας. Την 15^η Αυγούστου 2025 ανακοινώθηκε ότι **το Ευρωπαϊκό Κοινοβούλιο μηνύει την Επιτροπή** για τη χρήση της εν λόγω νομικής βάσεως.

Όσον αφορά τη **χώρα προέλευσης του αμυντικού εξοπλισμού** που δύναται να προμηθευτεί μία κοινοπραξία κρατών, **ισχύει ο κανόνας 65%-35%**. Ειδικότερα, η αξία του τελικού προϊόντος προερχόμενη από εξαρτήματα κρατών-μελών της ΕΕ, των κρατών ΕΟΧ-ΕΖΕΣ και της Ουκρανίας πρέπει να είναι τουλάχιστον 65%. Το υπολειπόμενο ποσοστό (ήτοι 35%) δύναται να προέρχεται από λοιπές χώρες. Επί τη βάση του Άρθρου 16, παρ. 12 του Κανονισμού, «ως *‘υπεργολάβος που συμμετέχει στην κοινή προμήθεια’ νοείται κάθε νομική οντότητα η οποία παρέχει κρίσιμης σημασίας εισροές, που διαθέτουν μοναδικά χαρακτηριστικά, ουσιώδη για τη λειτουργία ενός προϊόντος, και στην οποία ανατίθεται τουλάχιστον το 15 % της αξίας της σύμβασης, και η οποία χρειάζεται πρόσβαση σε απόρρητες πληροφορίες για την εκτέλεση της σύμβασης*». Προκειμένου, όμως, η συνεισφορά μίας τρίτης αμυντικής βιομηχανίας στην αξία του τελικού προϊόντος να είναι στο διάστημα 15%-35%, είναι απαραίτητη η σύναψη ξεχωριστής συμφωνίας. Εν προκειμένω, η **σύναψη διμερούς ή πολυμερούς συμφωνίας με την ΕΕ** προϋποθέτει ότι η τρίτη χώρα (πλην Ουκρανίας και μελών ΕΟΧ-ΕΖΕΣ) είναι προσχωρούσα, υποψήφια προς ένταξη ή δυνάμει υποψήφια προς ένταξη χώρα ή έχει συνάψει εταιρική σχέση για την ασφάλεια και την άμυνα με την ΕΕ (βλ. Α.4.). Εφόσον μία τρίτη χώρα πληροί την προϋπόθεση αυτή, τότε δύναται να εκκινήσουν οι διαπραγματεύσεις για τη σύναψη της εν λόγω διμερούς ή πολυμερούς συμφωνίας, με την οποία θα καθοριστούν οι όροι υπό τους οποίους θα συμμετάσχει η αμυντική βιομηχανία της τρίτης χώρας στην κοινή προμήθεια του Κανονισμού SAFE (βλ. [έγκριση](#) του Συμβουλίου για έναρξη διαπραγματεύσεων με Ηνωμένο Βασίλειο και Καναδά, οι οποίες χώρες έχουν συνάψει εταιρική σχέση ασφάλειας και άμυνας με την ΕΕ). Αυτές οι συμφωνίες [έχουν](#) ως νομική βάση τα Άρθρα 212 και 218 ΣΛΕΕ, τα οποία από κοινού ορίζουν ότι, **σε περίπτωση που το συμβαλλόμενο μέρος είναι χώρα υποψήφια προς ένταξη, τότε οι αποφάσεις λαμβάνονται με ομοφωνία**. Επομένως, προκειμένου να επιτραπεί η συνεισφορά μίας αμυντικής βιομηχανίας τρίτης χώρας σε επίπεδο 15% έως 35% στην αξία του τελικού προϊόντος, υπάρχουν δύο επίπεδα προϋποθέσεων, όπως αποτυπώνεται στο Γράφημα V.

Γράφημα V: Δύο επίπεδα προϋποθέσεων για συμμετοχή αμυντικής βιομηχανίας τρίτης χώρας σε ποσοστό ανάμεσα σε 15% και 35%



Σε κάθε περίπτωση, ωστόσο, προβλέπεται στον Κανονισμό SAFE ότι «*κανένα κατασκευαστικό στοιχείο δεν προέρχεται από τρίτη χώρα που αντιβαίνει στα συμφέροντα ασφάλειας και άμυνας της Ένωσης και των κρατών-μελών της*».

Σημειώσεις

1 Σημείωση: Τα δεδομένα είναι επικαιροποιημένα έως την 8η Σεπτεμβρίου 2025. Η G5 Sahel Joint Force έχει λάβει συνολική χρηματοδότηση για τις ΕΔ της Μαυριτανίας, καθώς και για λοιπές ανάγκες του Τσαντ. Δεδομένου του ότι το ακριβές ύψος του μέτρου συνδρομής για κα θεμία χώρα είναι δύσκολο να υπολογισθεί με ακρίβεια, για σκοπούς γραφικής απεικόνισης εμφανίζεται ποσό ύψους 17 εκατ. Ευρώ για αμφότερες. Η ίδια μεθοδολογική προσέγγιση εφαρμόζεται και στο μέτρο στήριξης για τον Κόλπο της Γουινέας (Γκάνα και Καμερούν). Το μέτρο συνδρομής για τη Multinational Joint Task Force εναντίον της Boko Haram αποτυπώνεται στον χάρτη στο Τσαντ, όπου βρίσκεται το αρχηγείο της. Αντιστοίχως, το μέτρο συνδρομής για το Balkan Medical Task Force αποτυπώνεται στη Βόρειο Μακεδονία. Όσον αφορά το μέτρο συνδρομής για τη Rwanda Defence Force στη Μοζαμβίκη, αποτυπώνεται στον χάρτη στη Ρουάντα. Για την Southern African Development Community (SADC) Mission στη Μοζαμβίκη, το μέτρο συνδρομής αποτυπώνεται στον χάρτη στη Μοζαμβίκη. Το μέτρο συνδρομής της Αποστολής της Αφρικανικής Ένωσης στη Σομαλία αποτυπώνεται στο χάρτη στη Σομαλία. Ορισμένα μέτρα συνδρομής υποστηρίζουν στρατιωτικές αποστολές/επιχειρήσεις της Κοινής Πολιτικής Ασφάλειας και Άμυνας (ΚΠΑΑ) της ΕΕ. Οι συγγραφείς ευχαριστούν τον Χρήστο Παγωνίδη, Ασκούμενο στο ΕΛΙΑΜΕΠ, για την ερευνητική βοήθεια στη συλλογή των δεδομένων.

2 Ο Ευρωπαϊκός Οικονομικός Χώρος (ΕΟΧ) περιλαμβάνει τη Νορβηγία, την Ισλανδία και το Λιχτενστάιν. Η Ευρωπαϊκή Ζώνη Ελευθέρων Συναλλαγών (ΕΖΕΣ) περιλαμβάνει επιπλέον την Ελβετία. Ο όρος «ΕΖΕΣ-ΕΟΧ» αφορά στα κράτη τα οποία είναι μέλη και της ΕΖΕΣ και του ΕΟΧ.

3 Πρόκειται για ένα ενιαίο μέσο παροχής χρηματοδοτικής στήριξης της Ουκρανίας για την περίοδο 2024 -2027 και βασίζεται σε τρεις (3) πυλώνες: α) οικονομική στήριξη, β) προσέλκυση και κινητοποίηση επενδύσεων, και γ) τεχνική βοήθεια και στήριξη της Κοινωνίας των Πολιτών. Ο προϋπολογισμός του ανέρχεται σε 50 δις. Ευρώ (επιχορηγήσεις και δάνεια).

4 Η κατηγορία [COFOG 02 - Defence](#) ορίζει τι περιλαμβάνεται στα διεθνή στατιστικά πρότυπα ως δαπάνες για την άμυνα. Ειδικότερα, περιλαμβάνει (με ορισμένες εξαιρέσεις) δαπάνες που άπτονται της α) στρατιωτικής άμυνας, β) πολιτικής άμυνας, γ) στρατιωτικής βοήθειας σε τρίτους, δ) αμυντικής έρευνας & ανάπτυξης, και ε) λοιπών εξόδων για την άμυνα.

From an Archipelago of Alliances to a Brussels Nexus: the Role of Military Agreements between EU member-states to the Evolution of EU Defence

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This paper presents the dynamically evolving web of military agreements among EU member-states concluded by EU member-states outside the EU framework, identifying two distinct categories of such agreements: a) defence partnerships/agreements, which contain explicit mutual defence clauses, and b) defence industrial or operational cooperation schemes, focusing primarily on capability development, joint military structures or operational readiness. After briefly outlining why such agreements remain relevant and necessary in today's security environment, the paper develops four future scenarios for EU defence cooperation:

- Scenario 1: An archipelago of alliances, characterised by fragmentation and the presence of ad-hoc alliances between EU member-states (and possibly like-minded third countries), where national governments take the lead.
- Scenario 2: A pragmatic adaptation to diversity, with the emergence of defence clusters, within the EU political and institutional framework, based on existing bilateral and plurilateral agreements, where national governments retain control.
- Scenario 3: A Brussels nexus, where Europe progresses towards defence integration through layering and developing a defence mosaic, which gradually unites under an EU umbrella, fostering a more coordinated network of partnerships led by both the European Commission and national governments.
- Scenario 4: An EU common defence, entailing full operationalisation of Article 42.7 TEU and the EU upgrade as a security provider.

The paper concludes with a set of policy recommendations, tailored to each potential trajectory.

To move from Scenario 1 to Scenario 2:

- Foster regional defence clusters for niche capabilities

To transition from Scenarios 1 and 2 to Scenario 3:

- Create a European Defence Agreements Register
- Invest in Defence Projects of Common Interest
- Render bilateral/plurilateral agreements compatible with Article 42.7 TEU

To advance toward Scenario 4:

- Operationalise Article 42.7 TEU

Introduction

Military agreements represent the most tangible expression of security and defence cooperation. They translate (or transform) shared intent and objectives into structured and potentially legally binding commitments. In simpler terms, they embody trust, mutual benefit, and common concerns or threats. The [coalitions of the willing](#) on Ukraine indicate such common perceptions and stance, demonstrating some EU member-states' willingness to mobilise beyond the existing Union's cooperation schemes (e.g., the Common Security and Defence Policy missions and operations). They reveal that security and defence cooperation (even on the ground) is no longer optional, showing Europe's strategic commitments as well as the political geography of European security. Nonetheless, the expanding landscape of treaties, pacts and memoranda also carries a paradox: the more these agreements multiply, the more complex and challenging coordination becomes. Thus, security and defence cooperation outside the EU framework consists of a dense web of interconnected elements, which are indirectly linked but lack a single central command and well-defined objectives.

This paper analyses the dense and complex landscape of military agreements concluded by EU member-states outside the EU framework. Hence, it deliberately excludes EU-level instruments, tools, and policies, such as the CSDP military missions and operations^[1], the Permanent Structured Cooperation on Defence (PESCO)^[2], the European Defence Fund (EDF)^[3], the European Peace Facility (EPF)^[4], or Military Mobility-related initiatives^[5], as these are either treaty-based or closely linked to EU foreign policy actions. We also consciously leave aside schemes of cooperation established within or in the context of regional security organisations, like NATO and the OSCE.^[6] Our focus remains on intergovernmental,

bilateral or plurilateral, agreements in which national governments retain ownership of their (binding) commitments and political decisions, outside such institutional frameworks.

Our objective is to evaluate whether and how these agreements can contribute to a more coherent and credible EU defence. Drawing on our previous [related work](#), this updated and expanded version posits that the proliferation of different types of agreements reflects both the EU's cooperative instinct and its fragmentation. In particular, EU member-states have signed a multitude of military agreements, each reflecting specific political imperatives or regional security logics. The result is a dense web of cooperation frameworks that coexist, overlap and sometimes compete. To make sense of this complex reality, our analytical approach distinguishes between two kinds of military agreements, which differ in the level and depth of commitments undertaken by the signatories. In that respect, we identify:

1. Defence partnerships/agreements, which contain explicit mutual assistance and/or defence clauses, and
2. Defence industrial or operational cooperation schemes, which focus primarily on capability development, joint military structures or operational readiness.

The paper is organised into five chapters. The first introduces the conceptual and theoretical background, explaining why the EU's liberal foundations and the member-states' willingness to retain national sovereignty make such agreements possible and desirable. The second outlines the various types of agreements, categorised into two main groups. The third chapter explains why military agreements concluded by EU member-states outside the EU framework are necessary, considering the existing multifaceted constraints. The fourth chapter develops scenarios for the future of EU defence cooperation, based on the dense network of existing agreements. The fifth chapter offers policy recommendations aimed at improving the Union's defence, coherence, and strategic autonomy.

Liberalism and the persisting need for military agreements

For over seven decades, the European integration process has been guided by the liberal conviction that cooperation is both rational and necessary. Based on the liberal understanding, democracy and (economic) interdependence [diminish](#) the incentive for conflict. Understanding why EU member-states choose to cooperate, even in sensitive areas such as defence and outside the official framework of the Union, requires grounding this behaviour in the liberal school of thought of international relations, which emphasises interdependence, international law and shared values as foundations of peace. Modern liberal theory mainly stems from [three](#) principal strands. The first, associated with John Locke, lies in the belief that individuals possess inalienable rights to life, liberty and property, and that states, as collective persons, inherit these rights in the form of political interdependence and territorial integrity. The second, developed by Adam Smith, Baron de Montesquieu and Joseph Schumpeter, articulates commercial liberalism, leading to liberal pacifism. The third, promoted by Immanuel Kant and Giuseppe Mazzini, advances a republican liberalism, which links democratic governance to international peace.

Doyle ([1997](#)) reformulated Kant's ideas into the theory of a "separate peace" among liberal democracies: liberal states, constrained by representative institutions and guided by respect for rights, are peaceful with each other, though they may be in tension with non-liberal regimes. This assumption was first tested by Babst ([1972](#)), who evaluated Wright's ([1965](#)) list of all major wars fought since 1500. His study indicated that *"the existence of independent nations with elective governments greatly increases the chances for the maintenance of peace"*. As classical liberals (e.g., Kant, Mazzini and Jeremy Bentham) [anticipated](#), democratic institutions and greater interdependence would reduce uncertainty and increase predictability, thereby encouraging cooperation and international peace. Furthermore, based on Kant's [book](#) "Perpetual Peace" and his definitive articles, Doyle ([2006](#)) explains that Kant *"appears to have in mind a mutual nonaggression pact, perhaps a collective security agreement"*.

When Kant's [triangle of peace](#) is applied to the European project, one may understand why the Union's evolution from an economic community to a political and security actor has been gradual yet persistent. Ikenberry ([2001](#)) underlines that in its most advanced manifestation, the international order includes an exercise of state power that is constrained and regulated by a framework of rules and institutions, and that states choose to participate in it motivated by self-interest, willingly exercising self-restraint. The EU epitomises this dynamic as it constitutes both a product and a guarantor of liberal internationalism. [However](#), liberals often exhibit realist-like scepticism about the feasibility of fully surrendering national sovereignty, thus recognising the limitations of cooperation.

Considering the aforementioned, alongside the deteriorating geopolitical environment and the fragility of the international order, the proliferation of military agreements can be understood as a pragmatic expression of Europe's liberal logic of cooperation, reconciled with the reality of state sovereignty. The EU's defence architecture and its Treaties reveal a persistent reluctance among member-states to transfer full authority over defence policy to supranational institutions. The field of defence, which is deeply integrated into national identity, remains the ultimate bastion of sovereignty. Military agreements concluded by EU member-states outside the EU framework act as bridging instruments between the liberal aspiration for collective security and the member-states' imperative to retain authority over the use of their armed forces.

This bridging is ever more relevant, considering the fragility of today's international order becomes evident. The current strategic environment is characterised by aggression, hybridity, and great-power competition. Specifically, although Russia's illegal annexation of Crimea in 2014 did not challenge the long-held assumption of enduring peace in Europe, the Russian invasion of Ukraine in 2022 did. It brought war and hostility back as methods of statecraft, exposing Europe's vulnerabilities. Moreover, hybrid threats (including, but not limited to, [cyber-attacks](#), [threats](#) and [sabotage](#) against critical infrastructure and [disinformation](#) campaigns) have blurred the lines between peace and war. As German Chancellor Friedrich Merz [stated](#) in September 2025, "*we are not at war, but we are no longer at peace either*". On the international stage, the EU finds itself navigating a shifting geopolitical landscape. This is exemplified by the United States' (US) [shift](#) of focus towards the homeland and the Western Hemisphere, prompting Europe to reassess its long-held reliance on the North Atlantic Treaty Organisation (NATO).

In this context, the warning [expressed](#) in August 2025 by the former Chief of the Defence Staff of France, General Thierry Burkhard, that "*a weakened Europe may find itself tomorrow as a hunted animal*" captures the sense of urgency. A united Europe that fails to coordinate its defence risks becoming a prey to its predators. To avoid such a devastating fate, Europe must confront the structural weaknesses that have long undermined its capacity for collective action. The EU continues to face persistent defence (capabilities) gaps, given the years-long military underspending and intra-EU legal and political constraints. Concerning readiness, the European (national) armed forces remain unevenly equipped and trained with disparities in deployable capabilities. At the same time, they continue to rely [heavily](#) on the US and NATO for specific high-end strategic enablers, further perplexing the complex EU-NATO relationship. Interoperability also remains limited, with different weapon systems and military doctrines often making joint action cumbersome at best.

These challenges in delivering the public good of security at the EU level are not technical. They are, in principle, political. They reflect divergent threat perceptions and strategic cultures across the Union. For some member-states, defence means strengthening (or sustaining in life) NATO. For others, it also includes deepening EU defence integration. This divergence has led to a proliferation of security and defence agreements, all reflecting different understandings of what European security (should) looks like. We are discussing these agreements in the following section.

Typology of military agreements: methodology and characteristics

Methodological approach and visualization

Our categorisation of bilateral and plurilateral agreements concluded by EU member-states outside the EU framework in this paper is based solely on publicly available sources, including official treaty texts, national government press releases and other relevant documents. The visualisation of these agreements depicts the density of interactions and interconnections between member-states. For reasons of readability, when a stronger link already exists (e.g., a treaty with a mutual assistance or defence clause, which is shown in red), secondary agreements (e.g., defence industrial agreements) between the same states are excluded. The list is non-exhaustive and constitutes the product of a dynamic classification process, constantly monitored and updated.[\[7\]](#)

Figure I: Map of military agreements concluded by EU member-states outside the EU framework ([interactive version](#))



Created with [flourish.studio](#).

Figure II: Network graph with military agreements concluded by EU member-states outside the EU framework ([interactive version](#))



Created with [flourish.studio](#).

Partnerships with defence/mutual assistance clause

Table I: Partnerships/agreements with defence/mutual assistance clause						
Treaty Name	Party A	Party B	Year	Mutual defence clause	Reference to EU mutual assistance clause – 42.7 TEU	Reference to NATO collective defence clause – Article 5 Washington Treaty
Treaty of Aachen	France	Germany	2019	Article 4.1	Article 4.1	Article 4.1
Strategic Partnership Agreement	France	Greece	2021	Article 2	Preamble	Preamble
Quirinal Treaty	France	Italy	2021	Article 2.1	Article 2.1	Article 2.1
Friendship Treaty	France	Spain	2023	Article 9	Article 9.2	Article 9.2
Treaty of Nancy	France	Poland	2025	Article 4.2	Article 4.2	Article 4.2

The first category includes the most formalised and politically significant layer of military cooperation in Europe. These are bilateral treaties that contain explicit references to mutual defence, assistance or solidarity clauses, usually framed around deterrence and shared threat perception. The dataset identifies five such key partnerships/agreements currently in force among EU member-states. These include the Franco-German Treaty of Aachen (2019), the Franco-Greek Defence Agreement (2021), the Franco-Italian Quirinal Treaty (2021), the Franco-Spanish Friendship Treaty (2023), and the Franco-Polish Treaty of Nancy (2025). Each contains clauses referring to mutual assistance in the event of an armed attack by a third country.

Defence industrial cooperation and operational cooperation schemes

Table II: Defence industrial cooperation and operational cooperation schemes				
Scheme Name	Party A	Party B	Other Parties	Year
EUROCORPS	France	Germany	Belgium, Luxembourg, Poland, Spain	1992
EUROMARFOR	France	Italy	Portugal, Spain	1995
German/Netherlands Corps (1GNC)	Germany	Netherlands		1995
BeNeSam	Belgium	Netherlands		1996
Organisation for Joint Armament Co-operation	Belgium	France	Germany, Italy, Spain, Finland, Lithuania, Netherlands, Poland, Sweden, Luxembourg, Greece	1998
Baltic Defence College (BALTDEFCOL)	Estonia	Latvia	Lithuania	1999
Multinational Engineer Battalion "Tisa"	Hungary	Romania	Slovakia, Ukraine	2002
5+5 Defense Initiative	France	Italy	Spain, Malta, Portugal, Algeria, Libya, Mauritania, Morocco and Tunisia	2004
Movement Coordination Centre Europe (MCCE)	Austria	Belgium	Canada, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Hungary, Italy, Latvia, Lithuania, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Turkey, United States, United Kingdom	2007
NORDFECO	Finland	Sweden	Denmark, Norway, Iceland	2009

Central European Defence Cooperation	Austria	Czech Republic	Croatia, Hungary, Slovakia, Slovenia	2010
European Air Transport Command (EATC)	France	Germany	Belgium, Italy, Luxembourg, Netherlands, Spain	2010
BeNeLux Air Defence	Belgium	Netherlands	Luxembourg	2015
Dutch–German Air and Missile Defence Task Force (D/GE A&MD TF)	Germany	Netherlands		2016
European Intervention Initiative (EII)	France	Belgium	Estonia, Denmark, Finland, Germany, Italy, Netherlands, Norway, Portugal, Spain, UK, Sweden	2018
Motorized Capacity (CaMo)	Belgium	France		2018
Belgium-Luxembourg Binational Air Transport Unit	Belgium	Luxembourg		2020
Lublin Triangle	Lithuania	Ukraine	Poland	2020
Quadripartite Initiative – QUAD	France	Cyprus	Greece, Italy	2020
European Sky Shield Initiative (ESSI)	Germany	UK	Austria, Belgium, Bulgaria, Czechia, Denmark, Estonia, Finland, Greece, Hungary, Latvia, Lithuania, Netherlands, Poland Romania, Slovakia, Slovenia, Sweden, Portugal	2022
Nordic Air Force Cooperation	Denmark	Finland	Norway, Sweden	2023
Belgian-Luxembourg reconnaissance battalion	Belgium	Luxembourg		2023
Weimar+	France	Germany	Poland, Italy, Spain, United Kingdom, Ukraine	2025

If collective defence treaties represent Europe's political spine, industrial and operational cooperation schemes form its muscle and nervous system. These frameworks focus less on legal guarantees and more on capability development, joint military and command structures and interoperability. They bring substance to political commitments without, however, going the extra mile of providing explicit security guarantees. This category encompasses a wide variety of initiatives, some of which have multinational command structures and pools of shared personnel and/or resources. Others are more narrowly defined, focusing on specific capability domains, operational functions or vague commitments.

Key insights

France clearly stands out and naturally emerges as the central node of the bilateral military agreements with a defence clause, functioning as a strategic anchor. Its bilateral treaties combine political symbolism with operational cooperation, reaffirming Paris' long-standing role as the EU's key defence player.

These bilateral defence treaties are more than mere legal agreements; they often serve for the EU defence as strategic multipliers, enhancing the credibility and operational capabilities of the EU's collective mutual assistance clause under Article 42.7 of the Treaty on European Union (TEU). In reality, they embody political will in action. The Franco-Greek

agreement, for instance, is a clear expression of solidarity, complementing and supporting Article 42.7. The same principle applies to NATO's Article 5, whose activation is not automatic, as it requires a unanimous political decision within the North Atlantic Council. In the case of Greece, the defence agreement also provides an additional layer of protection against Türkiye.

Box I: A French nuclear umbrella for European states?

As doubts grow about the reliability of the US commitment to the security of the Old Continent, the [idea](#) of the French President, Emmanuel Macron, to extend France's nuclear deterrent to other European states has gained attention. Nevertheless, serious obstacles remain. In the aforementioned agreements, France has not committed to expanding its nuclear deterrence to any of its partners. There are two main reasons for this. First, expanding the nuclear umbrella would [strain](#) France's budget, which is already under pressure. Any decision to extend coverage to multiple member-states would require substantial additional investments (e.g., in delivery systems or in C2 platforms), even if a cost-sharing mechanism was in place, which is not. Second, French strategic culture is deeply rooted in nuclear independence. Extending the nuclear deterrent umbrella could imply either delegation or shared competence over nuclear use, and this constitutes a [red line](#) for the overwhelming majority of political forces in France.

The second category of agreements concerns operational cooperation and defence industrial collaboration, encompassing a wide range of institutional, bilateral, minilateral and plurilateral arrangements that enhance Europe's military interoperability, capability development and readiness. In contrast to collective defence treaties, which focus on security commitments, these frameworks primarily aim to develop and partially manage quasi-shared capabilities, coordinate operations and strengthen transnational defence-industrial cooperation.

A key example of operational cooperation is EUROCORPS, a multinational headquarters established in 1992. It provides a standing multinational command structure capable of planning and leading EU and NATO operations. Until [present](#), EUROCORPS' structures have been used for 8 missions abroad and 5 alert duties. It often serves as the Force Headquarters for EU Battlegroups. It does not constitute a permanent combat unit but a deployable high-readiness headquarters capable of commanding forces up to corps level.

Industrial cooperation mechanisms also form an integral part of this category. For instance, the Organisation Conjointe de Coopération en matière d'Armement (OCCAR), which was signed in 1998 and entered into force in 2001, aims to increase armaments cooperation, improve efficiency and reduce costs. As stated in its [convention](#), OCCAR *"shall coordinate, control and implement those armament programmes that are assigned to it by Member States and coordinate and promote joint activities for the future, thereby improving the effectiveness of project management in collaborative projects, in terms of cost, schedule and performance"*. It [manages](#) major European projects, such as the A400M transport aircraft, the BOXER armoured vehicle and the FSAF surface-to-air anti-missile systems.

The category also entails a strong regional dimension. For example, the Central European Defence Cooperation (CEDC) exemplifies the growing importance of minilateral initiatives among like-minded and geographically close EU member-states. It serves as a security and defence platform, allowing participants to tackle "common regional challenges and threats" and initiate "projects among armed forces and capacity-building". It has a clear focus on the civil-military dimension, as highlighted by the international military exercise "[Cooperative Security](#)", which centred on managing the migration crisis and explored the role of armed forces in supporting civilian authorities during such contingencies.

Alongside structured initiatives, looser and more flexible forms of quasi-geopolitical cooperation also emerge. They function primarily as political consultation and coordination platforms rather than binding frameworks. A prominent example is the Weimar+ format, which constitutes an expansion of the Weimar Triangle between France, Germany and Poland. It reflects European states' preference for flexible and [issue-specific](#) (i.e., Russia's war of aggression against Ukraine) cooperation.

All in all, the second category illustrates the scope of this network, a dense and decentralised system linking smaller and medium-sized member-states across the EU. Unlike agreements with a defence clause, where France dominates, this operational network is polycentric. It demonstrates that even smaller member states participate and can play a role in European military cooperation. Cross-regional ties are evident, indicating that cooperation often may extend beyond simple geographic blocs. Nonetheless, cooperation usually follows geographical (e.g., BeNeSam, CEDC) or functional logic (e.g., EII, which brings together politically ambitious, willing and capable states under a French framework for expeditionary readiness).

The added value of bilateral/plurilateral agreements for EU member-states

In today's evolving security architecture, the space within which European defence cooperation can develop is not unlimited. It is conditioned on three key constraints that delimit the extent of EU cooperation and enhance the added value of bilateral and plurilateral schemes of cooperation: a) political and strategic constraints, rooted in the contradiction between national sovereignty and European integration, b) national constitutional and legal limitations, stemming from national laws and neutrality commitments, and c) institutional inefficiencies and ambiguities within the EU treaties. These constraints explain why EU member-states conclude military agreements outside the EU framework: they are not acts of defiance against the Union, but rather indicators of flexibility and adaptability. Hence, these agreements serve a dual purpose. First, they allow willing groups of member-states to act together more quickly and flexibly, avoiding the institutional bureaucratic procedures that often characterise EU-level processes. Second, they accommodate functional differentiation as not all member-states share the same threat perceptions or strategic priorities, allowing each state to collaborate without requiring a one-size-fits-all policy.

The enduring contradiction between sovereignty and integration

The most persistent cleavage shaping EU defence arises from the competing imperatives of national sovereignty and integration. National governments continue to consider security and defence as the hard core of statehood, which cannot be transferred to a supranational government. The deployment of armed forces, the use of force and nuclear deterrence are still perceived as sovereign prerogatives, often tied to national parliaments and domestic public opinion.

This deeply rooted attachment to national sovereignty contrasts with the integration logic of the European project that is built upon the premise that pooled sovereignty can yield positive collective outcomes (e.g., trade). However, defence remains a field where integration is politically and emotionally charged, and it usually collides with national political realities, such as divergent threat perceptions, strategic cultures, and domestic political and economic incentives. For instance, Warsaw may perceive Russia as an existential threat, whereas Madrid or Rome may view instability in the Sahel as their primary concern. A more extreme example would be the case in which member-states transfer the ultimate decision to go to war to Brussels. In addition, national leaders naturally tend to privilege formats that maintain visible national control, as one of their objectives is their reelection.

It is precisely because of these divergences that the treaties themselves reflect a cautious approach. Article 42.2 TEU explicitly states that *"[t]he common security and defence policy shall include the progressive framing of a common Union defence policy. This will lead to a common defence, when the European Council, acting unanimously, so decides"*. The wording of *"progressive framing"* and the requirement of unanimity are deliberate, as they acknowledge that the member-states do not yet share the same strategic culture (or levels of ambition). In essence, the treaties codify the political reality. As a result, defence cooperation in Europe tends to proceed horizontally, through intergovernmental agreements, rather than vertically through supranational mechanisms. These flexible formats preserve autonomy while enabling coordination.

Constitutional and legal constraints

Beyond politics, legal and constitutional constraints further narrow the scope for a common EU defence. Some member-states, notably Austria, Ireland and Malta, are bound by constitutional and/or policy commitments to neutrality. These obligations limit their participation in EU defence structures. For instance, Malta is hesitant to participate even in EU defence industrial initiatives. In fact, it does not participate in PESCO, nor do Maltese entities benefit from EDF funding. The neutrality of these countries illustrates how constitutional politics and national identity perceptions act as a brake on integration, insulating national decision-making from supranational influence. While differentiated integration has been advanced as a second-best pragmatic solution, allowing groups of member-states to deepen cooperation and coordinate

their actions without requiring universal participation, this approach inevitably results in a fragmented EU defence landscape, according to which multiple security logics exist rather than one unified defence posture.

This tension becomes particularly evident when examining Article 42.7 TEU. While it constitutes (at least in theory) the EU's mutual assistance clause, committing member-states to assist one another subject to armed aggression by a third state, legal constraints exist and have even been integrated into the text. In particular, the article explicitly refers to the fact that its implementation *"shall not prejudice the specific character of the security and defence policy of certain Member States"*. This constitutes a safeguard in the [protection](#) of the neutrality or non-alignment of certain member-states, granting them an exemption from any collective (quasi-)military obligation. In practice, this clause formalises the existence of institutional coexistence of solidarity *and* differentiation within the EU's architecture, proving that a fully-fledged common defence remains incremental and politically sensitive.

Furthermore, fiscal frameworks can create another layer of constraint. Germany's constitutional 'debt brake', in force until its [reform](#) in March 2025, exemplified how economic governance can indirectly shape defence policy. The rule limited Berlin's ability to mobilise funds and prepare for the era in which we are currently living. This highlights that the domestic legal basis can paralyse strategic ambition and impede or delay collective EU defence efforts.

The ambiguity and inefficiency of the treaties

The EU treaties encourage the development of a common defence. However, in practice, this wording remains vague. It acknowledges the possibility of common defence but makes it conditional on unanimity (e.g., [Article 42 TEU](#)). The EU's mutual assistance clause also carries legal [ambiguity](#), particularly because of its unspecified scope and the lack of effective, clearly defined mechanisms for implementation. In other words, the clause's pledge of solidarity lacks the institutional strength and concrete obligations needed to turn it into real action. The Niinistö report suggests further operationalising this clause, but it does [not](#) include a specific roadmap. Similarly, the [Strategic Compass](#), while reaffirming the significance of the clause, fails to translate this commitment into actionable measures or concrete and specific examples.

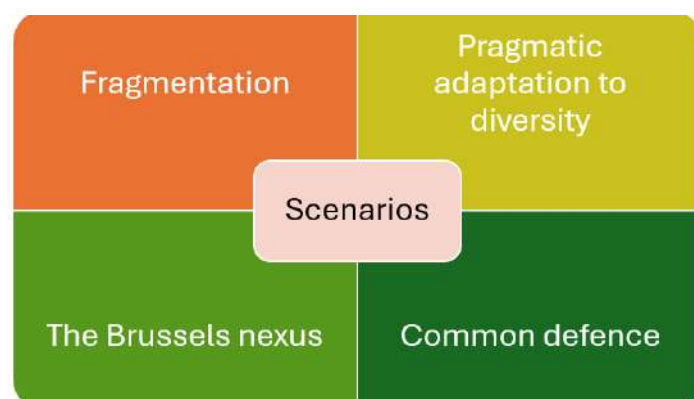
The EU Battlegroups further illustrate this institutional paralysis. Although fully operational since 2007, they have never been deployed, mainly due to political hesitation and financial obstacles. In fact, unanimity and cost-sharing disputes repeatedly [blocked](#) their activation and their deployment on the ground.

At the same time, Article 41.2 TEU explicitly prohibits using the EU budget to fund *"operations having military or defence implications"*. This provision does not allow the Union to finance (from its budget) the activities that could render its defence credible, nor does it incentivise intra-EU cooperation. The Commission's main defence-related initiatives have focused primarily on strengthening the European defence industry and supporting the development of dual-use infrastructure.

In a nutshell, this set of constraints infuses bilateral/plurilateral schemes of cooperation between EU member-states and constitutes the basis for alternative future scenarios regarding the future of EU defence collaboration.

Future Scenarios

Figure III: Four future scenarios



The EU and its member-states stand at a strategic crossroads. The dense network of existing defence and military agreements demonstrates both the potential and the limits of the Union's collective effort. Yet, as the security environment grows increasingly volatile, they must confront a fundamental question: what form should European defence take in the coming decade and what role should we envisage for the existing bilateral or plurilateral schemes of collaboration?

Four distinct, yet interconnected, scenarios can be envisaged for the evolution of Europe's defence landscape. Each reflects a particular balance between sovereignty and integration, political ambition and institutional constraint and between regional pragmatism and supranational coherence. A combination of the four is also possible.

Scenario 1: Fragmentation and ad-hoc alliances

Codename: *Archipelago of Alliances*

Key players: National governments

In this scenario, the EU security architecture continues to evolve through bilateral and ad-hoc arrangements, without an overarching framework of coordination. EU member-states respond to threats in a decentralised manner, guided primarily by national threat perceptions, political preferences and historical ties. The absence of a unifying strategic centre leads to a proliferation of overlapping treaties, memoranda of understanding and initiatives. This fragmented model fosters a form of cooperation in which smaller or militarily weaker member-states align themselves with stronger partners for security guarantees. In this context, the EU serves as a platform for discussion and consultation, rather than for actual decision-making. Its institutional mechanisms (e.g., Article 42.7 TEU or the Rapid Deployment Capacity) remain underutilised or symbolically invoked.

As national governments become the key players, the Union's strategic posture loses coherence. Europe moves towards a system reminiscent of the pre-integration era, notably an archipelago of alliances rather than a continent of collective defence.

Scenario 2: Regionalisation and the rise of defence clusters within the EU

Codename: *Pragmatic adaptation to diversity*

Key players: National governments

A second, more structured outcome would be the regionalisation of EU defence through the regional clustering of these bilateral/plurilateral agreements. In this scenario, geopolitical geography and shared security concerns drive the creation of sub-regional clusters with robust defence cooperation. Instead of a single European defence identity, the continent is witnessing the emergence of multiple, partially overlapping regional coalitions, led by EU member-states with the possible participation of like-minded third countries. France, as the EU's biggest conventional military power and only nuclear power, would likely act as a cross-regional anchor, participating in multiple clusters to expand its strategic reach. In the Mediterranean, for example, the EuroMed-9, excluding Malta, could form the nucleus of a southern defence cluster, prioritising issues such as maritime security, migration-related instability and counterterrorism. This regional cluster will significantly contribute to the development of a more robust NATO [strategy](#) for the southern neighbourhood.

Regionalisation could enhance the EU's responsiveness to local security dynamics and promote specialisation and pooling of resources. However, it risks fragmenting strategic coherence, as regional agendas diverge. Coordination across clusters would remain weak, and Brussels' role would primarily be consultative. This scenario thus represents a pragmatic adaptation to diversity, which may be effective regionally but limited in forging a unified EU defence posture.

Key players in this model remain national governments, which could even establish region-based multinational commands to ensure interoperability and efficiency, without surrendering national control to supranational institutions.

Scenario 3: Nested integration and the EU's defence mosaic

Codename: *The Brussels nexus*

Key players: European Commission and national governments

The third scenario envisions an EU that achieves defence integration through layering rather than centralisation. Here, existing bilateral/plurilateral military agreements are gradually clustered under an EU umbrella, creating a dense but more coordinated network of partnerships. In this [institutional nesting](#), Brussels becomes a hub for connectivity not by

commanding armies but by harmonising industrial, technological and operational cooperation. Under this scenario, the European Commission, working closely with the European Defence Agency (EDA), leads efforts to standardise procurement, strengthen the defence-industrial base, and foster interoperability among national forces, taking further the existing collaboration between member-states in the context of these agreements. Member-states retain control over operational decisions and deployments, but they recognise that industrial and technological sovereignty can only be achieved collectively. The EU framework would act as an integrative layer connecting national and regional initiatives.

Key actors in this scenario are the European Commission and national governments, which operate through the Council and the EDA. This model is institutionally feasible under current treaties, but its success would depend on sustained political will and financial commitment.

Scenario 4: Full operationalisation of Article 42.7 - Towards common defence

Codename: *EU common defence*

Key players: EU

The most ambitious scenario includes the full operationalisation of Article 42.7 TEU and the transformation of the EU into a quasi-defence alliance, relying on the *acquis militaire* created through these bilateral/plurilateral agreements. In this scenario, EU member-states agree binding mutual defence commitments at the EU level and establish a common protection umbrella guaranteeing the security of all member-states, building on the content of the most ambitious bilateral/plurilateral agreements. This scenario entails a unified command structure, shared funding mechanisms and common strategic culture. The EU effectively evolves into a European pillar within NATO. Regional clusters may persist, serving as platforms for niche capabilities (e.g., Arctic warfare, maritime surveillance). National sensitivities regarding command structures and budget would need to be reconciled. In this future, the EU will finally embody a common defence in substance, not only on paper, marking the end of fragmented security.

Scenario-based policy recommendations

At this moment, Scenario 1 is what we experience in reality. There is an archipelago of alliances, where European ad-hoc alliances of diverse scope and depth multiply and fragmentation persists. The [Defence Readiness Roadmap](#) announced by the Commission and the High Representative on 16 October 2025 may pave the way for moving closer to Scenarios 2 and 3. In particular, forming capability coalitions between member-states to foster capability development and to broaden burden-sharing is the right way to go. In addition to these proposals, the following scenario-based policy recommendations aim to strengthen the EU's defence collaboration and rationalise its cooperation frameworks.

From Scenario 1 to Scenario 2:

Foster regional defence clusters for niche capabilities: Recognising strategic diversity among EU member-states, the EU could encourage regionally focused defence clusters that complement the Union's collective framework. For instance, the Nordic and Baltic member-states could specialise in Arctic and hybrid security, while the southern member-states could focus on maritime security. Such clusters should remain open and interoperable, functioning as pilot structures that can later be integrated into a broader EU framework. This resembles the logic underpinning PESCO projects, which should be further enhanced and utilised to create a conducive environment for Scenario 2.

From Scenarios 1 and 2 to Scenario 3:

Create a European Defence Agreements Register: A comprehensive mapping of existing bilateral/plurilateral agreements should be undertaken to identify overlaps, inefficiencies and redundancies. The main objective would be to understand the number and depth of existing schemes of cooperation, compare them, and attempt to consolidate and harmonise them. A single, regularly updated European Defence Agreements Register, coordinated by the European External Action Service and the respective national ministries, could serve as a monitoring tool that would facilitate closer coordination and prevent duplication. For example, if a plurilateral initiative already exists in a specific domain, two states could join it instead of establishing a bilateral agreement.

Invest in Defence Projects of Common Interest: These projects shall be universal and open to all EU member-states, with a 360-degree geographical coverage, meeting the most significant EU defence needs. In addition to the already announced projects (i.e., ANTIDRONE ETC), the creation of a "maritime shield" will signal the EU's move to the Brussels nexus scenario.

Render bilateral/plurilateral agreements compatible with Article 42.7 TEU: Member-states shall prioritise the signing of new or the revision of existing bilateral/plurilateral military agreements, ensuring the inclusion of explicit defence clauses compatible with Article 42.7 TEU. Such clauses will entail clear legal obligations and well-defined procedures for invocation.

Moving to Scenario 4:

Operationalise Article 42.7 TEU: The EU should translate its mutual assistance clause and its principle of solidarity into practice. This requires strengthening the Military Planning and Conduct Capability (MPCC) and ensuring that the EU Rapid Deployment Capacity becomes a genuinely deployable tool. A clear roadmap of what happens after the invocation of the clause, an effective burden-sharing mechanism and command arrangements are indispensable. Formal links with NATO structures are vital, provided that they can only be established and function well if all NATO Allies recognise each and every EU member-state. Notably, the European Parliament, through a recent [resolution](#), explicitly called on member-states to “activate Article 42(7) TEU where such gross aggressive actions amount to an armed attack or contribute to preparing an imminent attack” and urged both the EU and the member-states to establish “operational procedures and mechanisms” in case a country triggers this clause. In simple words, the resolution underscores the urgent need for clear and well-defined procedures. It is noteworthy that a first [draft](#) of this resolution went even further in its ambition, proposing that military support for member-states invoking Article 42.7 should be financed through the EPF and that any member-state opposing such use of the EPF would contravene “its duty of loyalty and solidarity”.

The four scenarios outlined in this paper illustrate the strategic crossroads at which the EU now stands. Whether it continues as an archipelago of ad hoc alliances, evolves into regional clusters, consolidates a Brussels-centred nexus, or advances towards a true common defence, each path reflects a distinct balance between current needs and the aforementioned existing constraints. In all four scenarios, the problem is not the absence of cooperation, but the failure to achieve implementing coherence. Fragmentation, as envisaged in Scenarios 1 and 2, may offer flexibility, but without a centre of gravity, the EU’s collective power diffuses. Pragmatically, Scenario 3 is the most feasible one to pursue at this moment, but its main challenge is to strike the right balance between the two levels (i.e., EU and bilateral/plurilateral) for providing the public good of security. Scenario 4 is the most ambitious one, paving the way for an EU army.

References

- [1] EU military missions and operations allow member-states to deploy troops abroad for a wide range of tasks, as set out in the [Petersberg Declaration](#) adopted at the Ministerial Council of the Western European Union in June 1992.
- [2] [PESCO](#) is a treaty-based framework for all member-states, excluding Malta, “to jointly plan, develop and invest in collaborative capability development and to enhance the operational readiness and contribution of armed forces”.
- [3] The EDF [constitutes](#) the Commission’s main tool to support research and development in defence. It has a budget of approximately 7.3 billion EUR for the current Multiannual Financial Framework 2021-2027, with 2.7 billion EUR allocated for research and 5.3 billion EUR for capability development.
- [4] The EPF is an off-budget [tool](#) aimed at enhancing the EU’s ability to promote peace and stability worldwide. It is structured in two pillars: a) operations, which finances the common costs of CSDP missions and operations with military or defence implications, and b) assistance measures, aiming to finance non-EU countries and international organisations to strengthen their military and defence capacity.
- [5] The facilitation of the movement of military troops and assets has become a top priority for the EU, which has [launched](#) several strategic documents and initiatives related to military mobility, including but not limited to the Military Mobility Action Plan 2.0 or the Military Mobility PESCO project.
- [6] For example, we do not take into consideration Air Policing missions in the framework of NATO.
- [7] The authors would like to thank Mr. Fivos Badekas, undergraduate student at Athens University of Economics and Business (AUEB), and Mr. Christos Pagonidis, Intern at ELIAMEP, for their research assistance.

Analysing political dynamics in the new European Parliament: Political Cleavages and Division Lines

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Introduction

The 2024 European Parliament (EP) elections have brought significant changes to the EU political landscape: new political groups have been created, some older ones have been dissolved, and a lot of new national political parties have appeared in the political landscape of both the EU and EP politics. The recent turmoil, in November 2025, regarding the passing of the so-called Sustainability Omnibus legislation, that included the Corporate Sustainability Reporting Directive (CSRD) and the Corporate Sustainability Due Diligence Directive (CSDDD), is indicative of the fluidity of the European political system and the new socio-political dynamics unfolding at both national and European level. In this vote, the *European People's Party* (EPP) voted together with the *Patriots for Europe* (PfE) and the *Europe of Sovereign Nations* (ESN) groups, and were backed by the *European Conservatives and Reformists* (ECR), in a coalition of forces atypical of the previous broader EP political dynamics.

In an overview of the EP political landscape, more than 200 parties from the 27 EU Member States are currently represented in the EP, forming an extremely diverse and complex political environment. This distinguishes the EP from most national parliaments, in which the number of parties is limited, and the dividing lines are more stable. A distinctive feature of political interactions unfolding in the EP is the absence of strict party discipline. Unlike most national parliaments, there are very often differences of opinion among MEPs from the same transnational political group or even national party. This reflects the ideological variety and multiplicity of the EP parties, the frequent prioritization of national concerns and preoccupations over the views of the EP political group they have joined as well as the relative autonomy that MEPs retain in forming their positions.

The objective of this study is to analyse in depth MEPs voting patterns in this first year of the new EP term, identifying political networks and division lines not only **between** political groups but also **within** them. The analysis of roll-call votes reveals a complex picture of current political balances, acknowledging the volatility of MEPs' political behaviour.

Following this introduction, we discuss briefly, in the second section, the literature insights regarding political dynamics and cleavages in EP politics. In the third section, we offer an overview of the existing political groups and parties represented in the EP, before proceeding in the fourth section to the methodology, which is further elaborated in Appendix I. The fifth, and sixth sections of the paper constitute the backbone of our work and analysis, discussing in turn the political distance between EP groups, their internal cohesion as well as their thematic convergence (or divergence) in specific policy areas. The seventh sections offers a first tentative attempt to account for the voting patterns with reference to the two most important political cleavages identified in EP politics, namely Left-Right and EU-national sovereignty. We conclude by summarizing our findings and their political implications.

Political Cleavages in the EP: Some Evidence from Literature

Following the conclusion of the sixth parliamentary term (2004-9), the EP amended Rule 159a of its Rules of Procedure, rendering roll-call votes mandatory for all final decisions on legislative acts. This reform sought to enhance EP accountability and transparency vis-à-vis European citizens (Hug, 2016). Yordanova and Mühlböck (2015) further show that this rule has changed earlier approaches, demonstrating that party group cohesion had been underestimated rather than inflated in previous analyses based on requested votes, since requested roll calls tended to focus on more contentious issues that by default triggered polarization and voting splits among EP political parties. This institutional change therefore not only improved transparency but also allowed for more accurate and representative assessments of party cohesion and voting cleavages in the EP. The analysis covered the European People's Party (EPP), the Socialist Group (PSE, now S&D), the Liberal Group (ALDE), and the Greens or European Free Alliance (Verts/ALE), which remained consistent throughout the sixth and seventh parliamentary terms.

Bressanelli et al., (2016) examined how EU informal decision-making affected voting cohesion in the European Parliament. Using roll call data from 1999 to 2011, they found that cohesion increased among the centrist groups, especially the European People's Party, the Party of European Socialists, and the Alliance of Liberals and Democrats for Europe. These groups, often involved in trilogue negotiations and national governments, voted more cohesively on early agreements than on other legislative files. The study found that informalisation strengthened cohesion among centrist groups but reduced transparency in EP decision making.

Finke (2014) examined the reasons behind roll call vote requests during the sixth European Parliament (2004-2009). He found that groups with lower internal cohesion were more likely to request roll calls. This reflected a stronger role for national party delegations and a weaker role for group leadership, as sponsors were often closer to national than European median positions. Many roll call votes were used for position taking rather than policy purposes. Smaller parties such as the Greens or European Free Alliance used them to signal loyalty to domestic audiences, while larger parties delayed recorded votes until final legislative decisions. Thierse (2016) found that groups were more likely to request a roll call when they had already opposed a proposal at committee level, showing that cohesion existed before rather than after such votes.

Hix et al., (2005) showed that political behavior and alliance formation within the European Parliament were structured along the left-right ideological axis from the first to the fifth parliamentary term (1975- 2004). This axis did not fully explain the behavior of all groups, as Eurosceptic and non-attached members had limited cooperation with other groups. Party cohesion increased across terms, with the Agreement Index rising from the first to the fifth term. Cohesion grew as the EP legislative role expanded, even with rising national diversity after enlargement. Later studies added a second analytical dimension that separated government from opposition (Hix & Noury 2015). During the 2004-2009 term, ideological orientation remained the strongest factor shaping voting patterns, but political groups' positions toward the Commission also mattered. Groups represented in the Commission tended to vote together despite ideological differences. Following the 2014 elections, the European dimension defined by the divide between pro-European and Eurosceptic positions became the main factor explaining roll call voting (Hix et al. 2019).

The financial crisis in 2008 reduced the weight of the left-right divide and increased the role of attitudes toward European integration. In fiscal and economic issues, the European dimension became more important, and after 2013 both dimensions co-existed, accounting for about half of all votes on economic matters (Cheysson & Fraccaroli 2019). Chopin et al. (2019) used expert survey data, Eurobarometer series, and roll call analysis from 2004 to 2018 to show that by the 2014-2019 term, the European integration dimension explained 26.4 percent of voting behavior compared with 20.4 percent for ideology. The study also noted divisions linked to cultural and migration issues, which increased political fragmentation and produced a more fluid alliance system.

In the ninth European Parliament term (2019-2024), the idea of a stable bipolar structure has been questioned. Research points to a multipolar and variable alliance system. Legislative consensus is increasingly based on cooperation on specific issues rather than permanent coalitions. Political divisions now follow two main dimensions: ideological cohesion and group identity, and the divide between Euroscepticism and Europhilism, which cuts across ideological boundaries and shapes the formation of cohesive voting blocs (Rosalino et al. 2025).

Composition and Political Structure of the European Parliament (2024-29)

The EP, which is one of the two legislative bodies in the EU bicameral political system, consists of 720 members, organised into eight transnational political groups, each of which has a relatively clear and distinctive political identity. Some MEPs do not join any political group (Non-Inscrits - NI), opting for political independence, either for ideological or strategic reasons, at the expense, however, of their political influence.

TABLE 1: Political Groups in the European Parliament					
Code	Name	EP Members in political groups (16 July 2025)	Nb of Political Parties	Independents	Biggest Political Parties
EPP	European People's Party	188	47	3	CDU (Germany) PP (Spain)
SD	Progressive Alliance of Socialists and Democrats	136	27		PD (Italy) PSOE (Spain)
PFE	Patriots for Europe	85	16		RN (France)
ECR	European Conservatives and Reformists	79	22	2	Fdl (Italy) PiS (Poland)
RENEW	Renew Europe	75	35	2	
GREEN/ EFA	Greens/European Free Alliance	53	22	2	GRUNEN (Germany)
GUE/NGL	The Left in the European Parliament	46	18	3	FI (Italy) M5S (Italy)
ESN	European Sovereign Nations	27	8		AfD (Germany)

Source: [European Parliament](#)

As of July 10, 2025, the European Parliament includes 203 national parties represented by 701 Members of the European Parliament (MEPs), reflecting a high degree of political fragmentation. Only 12 parties have more than ten delegates. Eighteen independent candidates hold seats without any party affiliation, 83 parties are represented by a single MEP, 46 parties have two MEPs, and 22 parties have three MEPs each. Altogether, 259 MEPs, more than one third of the entire Parliament, belong to very small political parties or have no party affiliation. On the one hand, this enhances diversity and pluralism within the EP. On the other hand, it constitutes a constant concern regarding the formation of stable political and ideological networks given the much prevailing individualistic approach to politics of the majority of such political 'lone wolves'. Conversely, just 10 national parties gather 204 MEPs, dominating political interactions in the EP environment.

It is worth highlighting the highly dynamic nature of the system, with these figures constantly changing, as several MEPs shift from one national party to another or become independent away from the national parties with which they were initially elected. At the same time, it is not uncommon for MEPs elected with the same national party to join different groups in the EP.¹ Still, these MEPs ultimately display similar voting behaviour, with their national partisan priorities eventually outweighing the ideological lines of their respective European political group.

In general, parties follow the political direction of the political group to which they belong, while maintaining a significant degree of autonomy. However, in several votes, there is a cross-party national convergence that transcends the ideological identity of MEPs and their respective political families. In this fluid political environment, outliers and extreme cases exist, with parties and delegates who deviate significantly and consistently from the voting average.² The multitude and diversity of parties and the absence of strict political discipline in voting result in significant differences in voting patterns, which will be analysed in the next sections.

Roll-call votes: Methodology and Data

A total of 221 roll-call votes were collected from howtheyvote.eu, covering the period from the beginning of the 10th parliamentary term until 10 July 2025. These votes were grouped into ten key thematic areas based on their titles. As shown in Table 2, financial and budgetary issues are of primary importance, being the most frequently voted topic. In contrast, only one vote related to agricultural policy was recorded for 2024-25; therefore, this thematic area was excluded from subsequent analyses.

TABLE 2: Roll-call Votes in the European Parliament (2024-25)			
	Thematic Area	Description	Number of Votes
1	Budget/Financial Issues	EU expenditure and priorities	57
2	External Relations	General foreign policy issues	40
3	Environment	Climate change, sustainability	29
4	Human Rights	Within the EU and internationally	27
5	Institutional issues	Role and functioning of institutions	18
6	Russia – Ukraine	Special section (due to issue salience)	16
7	Health – Social policy	Social cohesion, resilience	13
8	Energy and industry	Energy transition, competitiveness	12
9	Technology – Digital	Digital market, artificial intelligence	10
10	Agriculture		1

A three-point coding system was applied to MEPs' political stance on each vote ('in favour': +1; 'against': -1; 'Abstention or absence': 0). Summing up the votes of respective MEPs of one political group, as explained in more detail in the Methodological Appendix I, the closer the group's score is to +1, the clearer its overall support for a voted resolution is, i.e. most of its parties and MEPs have voted in favour of it. Conversely, the closer it is to -1, the stronger the group's rejection of it is. If the score is close to 0, it indicates a tendency toward abstention on that resolution, or intra-group lack of cohesion and fragmentation. For example, a score of +0.92 means that almost all MEPs of a political group voted in favour, while a score of -0.92 means that the vast majority of MEPs within that political group voted against.

Using these results, we calculate each national party's distance from its respective European political group by comparing their average voting scores and accounting for the number of votes cast. This distance value, ranging from 0 (complete alignment) to 10 (maximum divergence), expresses how closely a national party's voting behaviour corresponds to that of its group as a whole.

Distance between EP Political Groups

Table 3 shows the political distance between the EP political groups. The first cluster of political groups with relatively smaller distances between each other is easily discerned and comprises the EPP, the S&D, and Renew, with the Greens at some (small) distance. Far away politically from this cluster, a second one comprises ESN and PFE. Both the European Left and the ECR have an intermediate position, showing thematic flexibility and an occasional, selective *ad hoc* convergence with either cluster in different votes. Finally, the non-inscrits MEPs feature high heterogeneity and low predictability in their voting behavior.

TABLE 3: Political Distance between EP Political Groups									
	EPP	SD	PFE	ECR	RENEW	GREEN_ EFA	GUE_NGL	ESN	NI
EPP	0	2.40	5.37	3.00	1.38	3.45	4.70	6.38	4.53
SD	2.40	0	5.65	3.53	1.72	2.18	3.99	6.47	4.47
PFE	5.37	5.65	0	3.51	5.58	5.90	4.80	2.67	2.74
ECR	3.00	3.53	3.51	0	3.30	4.09	4.38	4.77	3.40
RENEW	1.38	1.72	5.58	3.30	0	3.01	4.54	6.52	4.63
GREEN_EFA	3.45	2.18	5.90	4.09	3.01	0	3.35	6.64	4.56
GUE_NGL	4.70	3.99	4.80	4.38	4.54	3.35	0	5.27	3.14
ESN	7.46	7.48	3.02	5.50	7.36	7.25	6.06	0	3.09
NI	4.53	4.47	2.74	3.40	4.63	4.56	3.14	3.09	0

The visualization of these findings in Figure 1 shows clearly that a **majoritarian 'governing coalition'** of EP political groups is formed, with core members being the **EPP, S&D and Renew** groups, while the **Greens/EFA** are in relatively close distance. Potential bridges between the European Left and the Greens as well as between the ECR and the EPP are discernible, despite the relative distance. The other two political groups (ESN and PFE), as well as the non-inscrit MEPs, are further away from the European political majority.

Figure 1: Visualisation of EP Political Group's Relative Positioning – ALL VOTES



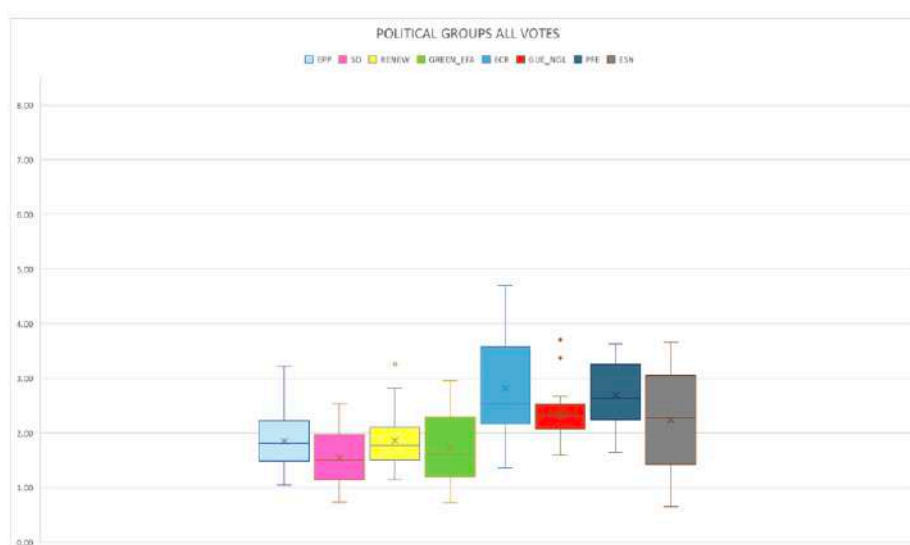
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Cohesion of EP Political Groups

Overall Party Cohesion

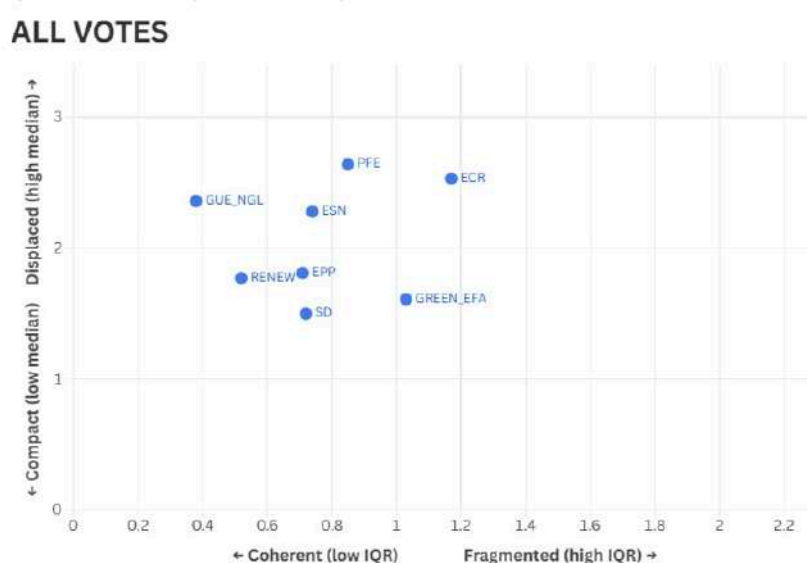
Having mapped the relative distance between EP political groups, we analyse, in this section, their internal cohesion – first in terms of their overall voting record, and second in relation to their voting behaviour across thematic clusters (see Appendix I for methodological details). The closer the median is to 0, the stronger the cohesion of each group. Overall, as illustrated in Figure 2, **S&D** is the most cohesive group in the EP, whereas large deviations in the voting patterns of their constituent members exist in the **ECR** and **PfE** groups, indicating lower internal cohesion. The **EPP** and the **RENEW** group also show a high level of cohesion, reflecting a more stable and coordinated political stance within their groups.³

Figure 2: Cohesion of Political Groups – All Votes



Distributional data, visualized in Figure 3 and presented in full in Appendix 2, show that the S&D, EPP and RENEW political groups record the smallest interquartile ranges (IQR $\approx$ 0.7), suggesting that most members vote closely in line with their group median. Conversely, the ECR and PFE show the widest dispersion (with IQR values exceeding 1.1), reflecting greater internal diversity and a higher frequency of deviant voting cases. Groups such as the Greens/EFA, GUE/NGL, and ESN fall in the intermediate range, displaying moderate cohesion levels.

Figure 3: Cohesion of Political Groups – All Votes



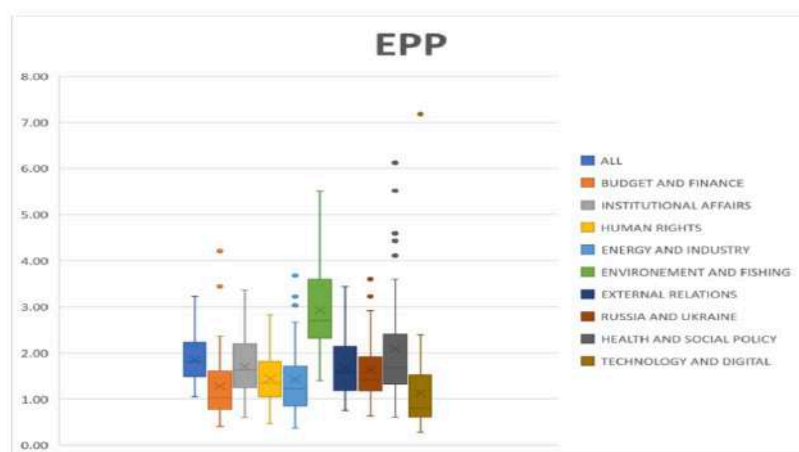
Thematic Breakdown Per Party

Breaking down the full set of roll call votes into the nine thematic clusters identified, several interesting observations occur per political group, as seen in Figures 4 to 11.

The EPP Group

The **European People's Party (EPP)** is the largest political coalition in the European Parliament, both in terms of the number of MEPs and the number of parties from almost all EU countries. Its political family often includes more than one party from the same country, reflecting its diversity and broad appeal. However, despite its multi-party composition, the EPP has an overall high degree of cohesion, compared to most of the other EP groups. Narrowing down the focus thematically, on almost all issues, its members are very well aligned, as depicted in Figure 4, with the most problematic thematic area in terms of cohesion being the environment. There are very few cases of national parties deviating systematically from the common line (outliers), most notably the Swedish *Kristdemokraterna*, which stands out overall, and the French *UDR* in technology and institutional affairs, with a few other cases in health and social policy as well as Russia-related issues.

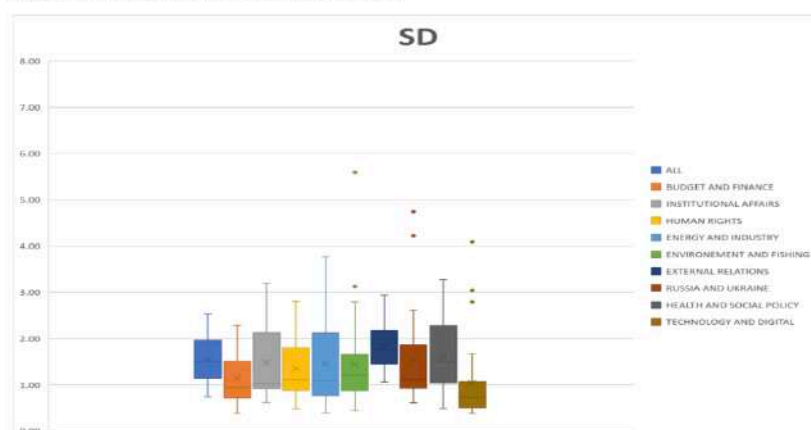
Figure 4: Cohesion of the EPP per thematic area



The S&D Group

The **Socialists and Democrats Group (S&D)** brings together parties from all EU countries and plays a decisive role in shaping and making decisions at European level due to its size and high degree of cohesion overall. As shown in Figure 5, in most areas, there is a very high degree of agreement among its members, which strengthens the group's unified political stance and its effectiveness in legislative procedures. Exceptions and political outliers in this group comprise the Estonian *Eesti Sotsiaaldemokraatlik Erakond* on environmental issues, or the Bulgarian *Balgarska Sotsialisticheska Partiya* and the Maltese *Partit Laburista* on resolutions concerning Russia.

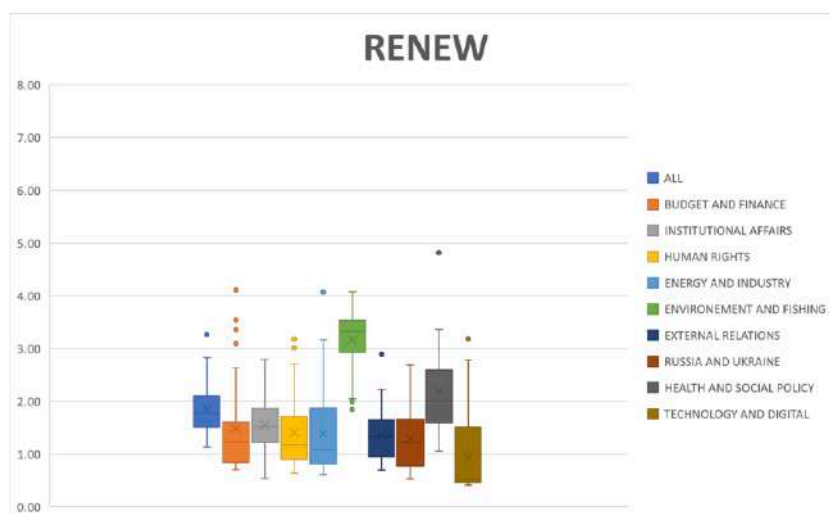
Figure 5: Cohesion of the S&D per thematic area



The RENEW group

The **Renew Europe** group is smaller in size than the EPP and S&D, but, nevertheless, it contributes substantially to the shaping of the European ‘governing majority’. Although it is mainly composed of smaller parties and does not have a dominant leading party, it shows remarkable cohesion compared to other political groups, with its members showing very small differentiation in their voting behavior except for the environment, as shown in Figure 6. Outliers comprise the Danish *Det Radikale Venstre*, mainly on environmental and energy issues, the German *Freie Wähler*, on budgetary and environmental issues, and the Latvian *Latvijas Attīstībai* on health and budgetary issues.

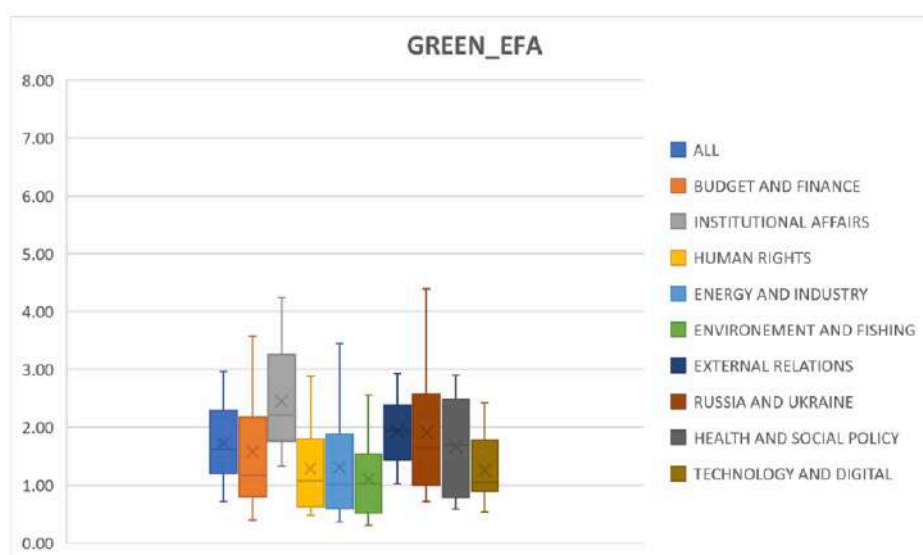
Figure 6: Cohesion of RENEW per thematic area



The GREEN_EFA group

Although not one of the largest political groups in the EP, the **Greens/European Free Alliance** actively participates in decision-making, often aligning with the majority, while maintaining a critical stance on specific topics. The group is dominated by the German Greens and shows a high degree of coherence in the fields of human rights, energy, environment and technology, which are key issues in the group’s political and ideological agenda (Figure 7). Despite existing internal differences, the Green political group remains a dynamic and active player in shaping European policy, with an emphasis on social justice, sustainability and technological progress.

Figure 7: Cohesion of the GREEN_EFA per thematic area

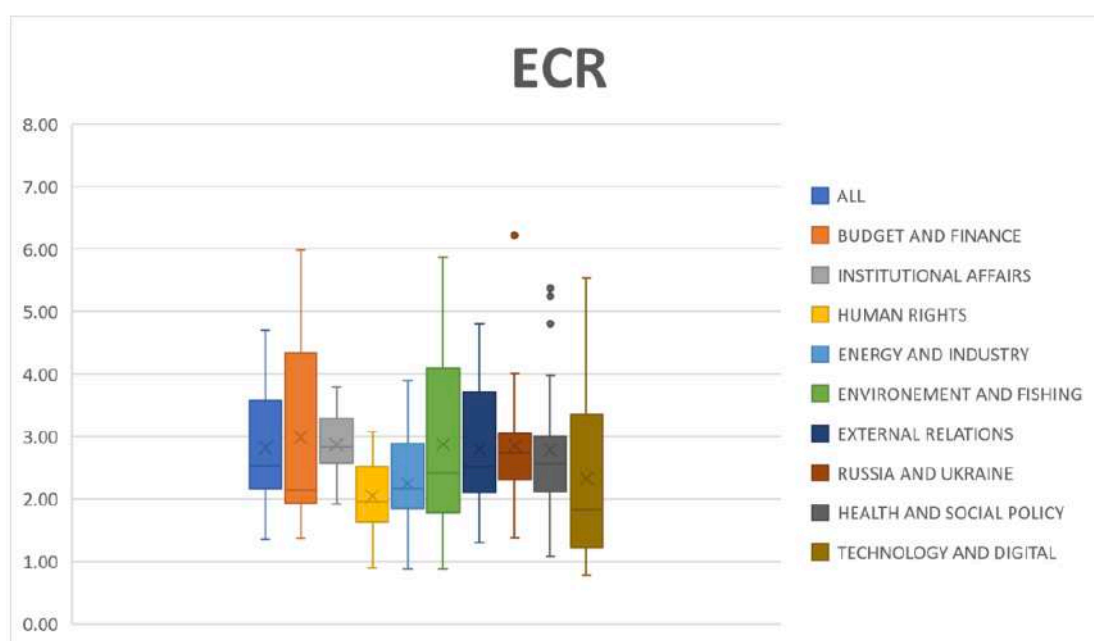


The ECR Group

The **European Conservatives and Reformists (ECR)** political group does not have a high degree of internal cohesion, with a rather loose and often contradictory stance on critical issues. It occasionally converges to the positions of the 'governmental bloc' (EPP, S&D, Renew, Greens), forming the -so called- "Venezuelan majority". Such an alignment mainly appears in votes concerning the condemnation of authoritarian regimes (such as Venezuela), democracy and human rights issues.

As shown in Figure 8, the group's cohesion is tested on most issues, especially on the budget, relations with Russia, the environment, health policy and institutional issues. In these thematic areas, several of its members lean towards more sovereigntist positions. The Italian party *Fratelli d' Italia* plays a key role in the shaping of the group's political line, while parties such as *Perussuomalaiset* (Finland), *Sverigedemokraterna* (Sweden), *Danmarksdemokraterne* (Denmark) and *Elliniki Lisi* (Greece) diverge significantly from the party's main line. Especially for the latter, *Elliniki Lisi* systematically deviates from the group's general stance, particularly on foreign policy and democracy issues. For example, on Russia, the party's stance is closer to that of the ESN group, which expresses more pro-Russian positions, and the same goes for the condemnation of authoritarian regimes and the strengthening of democracy as a European value. This is indicative of the broader ideological heterogeneity of the ECR and its limited capacity for internal discipline, with some constituent national parties acting more as independent players than a consistent member of the political group.

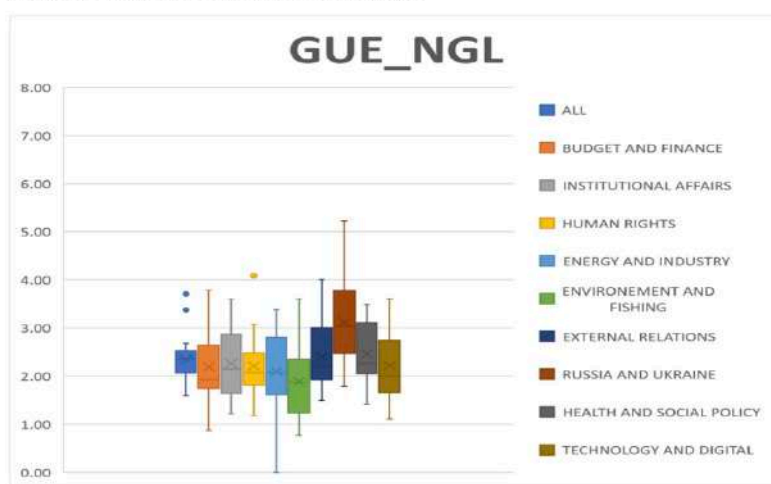
Figure 8: Cohesion of the ECR per thematic area



The GUE_NGL Group

The **Left** is a broad coalition of political parties comprising parties with communist roots, parties originating from the radical left, as well as eco-socialist and environmental activist movements. In addition, within the group there are anti-EU voices, as well as national parties that focus particularly on minorities rights. Despite such a diversity, the general level of cohesion is satisfactory, with significant differences, though, especially on Russia, where opinions are strongly divided (Figure 9). In general, the Left political group maintains a critical stance towards European integration. It rarely supports positions that strengthen the deepening of European integration, prioritising social justice, ecological sensitivity and national sovereignty. The most divisive issue for the group is relations with Russia, with outliers comprising the Danish *Enhedslisten - De Rød-Grønne*, the Cypriot *AKEL*, the Swedish *Vänsterpartiet*, and the Portuguese *Partido Comunista Português*.

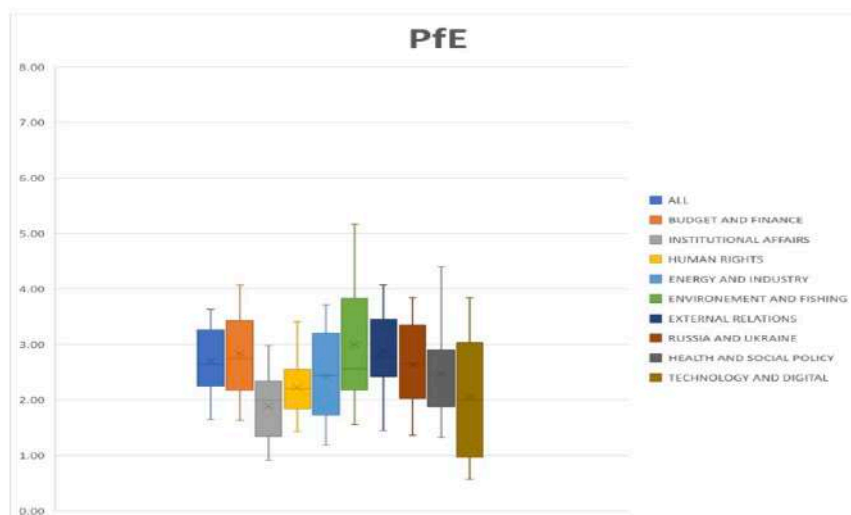
Figure 9: Cohesion of GUE_NGL per thematic area



The PfiE Group

The **Patriots for Europe** political group is a new coalition of sovereignist, Eurosceptic and right-wing/far- right parties that was formed after the dissolution of the *Identity and Democracy* (ID) political group. As indicated in Figure 10, the group does not have a consistent voting pattern, and its members vote differently on most issues. This makes it more of a tactical alliance than a coherent political party based on ideological unity. The issue showing the greatest divisions within this political group is the environment, where the divergences are particularly significant. The Czech *ANO 2011* votes differently on budgetary and environmental issues; the Czech *Přísaha* on budgetary, environmental, foreign affairs, and resolutions related to Russia; and the Czech *Motoristé sobě* on environmental and foreign affairs issues. The Austrian *FPÖ* diverges on technology issues, the Danish *Dansk Folkeparti* on budgetary matters, and the Dutch *PVV* on health issues.

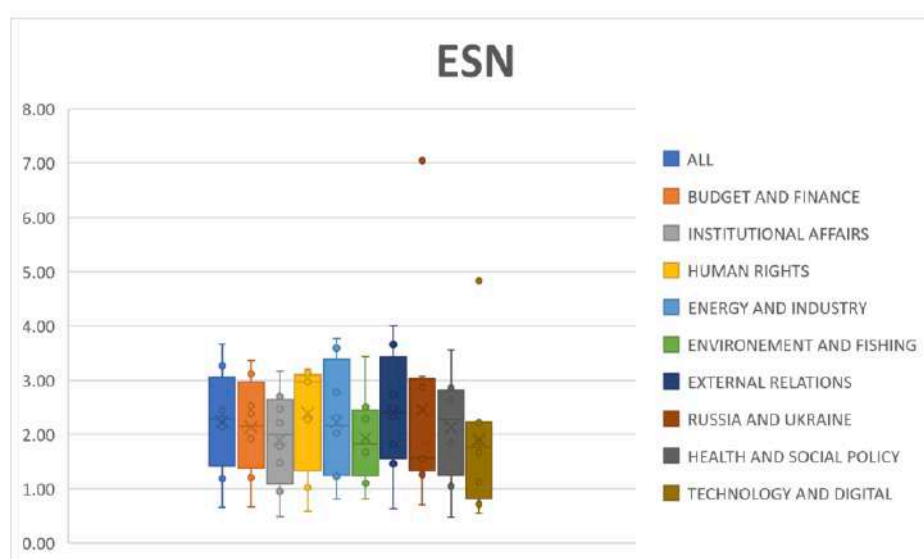
Figure 10: Cohesion of PfiE per thematic area



The ESN Group

Europe of Sovereign Nations (ESN) is the newest and smallest political group in the European Parliament. It was created to host Germany's *Alternative für Deutschland* (AfD), which was expelled from the ID group, in 2024. It was formed with the minimum number of MEPs and Member States required by the EP Rules of Procedure (23 MEPs from 7 countries). In practice, it is a single-party group, with AfD at its core, flanked by small and mainly regional parties. The ESN expresses a hardline Eurosceptic and sovereignist political stance with strong opposition to European integration. It functions more as an artificial construction to secure the benefits of parliamentary grouping (funding, speeches, committees) than as a cohesive political bloc. This is evident in the low cohesion of ESN in most issues, including energy, foreign policy, and relations with Russia, as illustrated in Figure 11. The constituent parties are better aligned on environmental issues, advocating an anti-green agenda, and on social policy issues, with a clear anti-immigration stance and rhetoric. Most notable differences in voting patterns are identified on resolutions concerning Russia, where the Lithuanian *TTS* voted systematically in deviation with the group's general line. The French *Reconquête* diverged from the group's general trend on foreign affairs and technology issues, while the Polish *Konfederacja* voted differently on energy matters.

Figure 11: Cohesion of ESN per thematic area



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Voting and Political Cleavages in the EP

Having identified the levels of internal cohesion of the EP political groups as well as their relative distance in the previous sections, we now turn our attention to the association of our findings with the main political cleavages identified in the EP politics. In that respect, we explore whether voting decisions are linked with their position on the traditional Left-Right ideological axis and/or their stance toward European integration.

Our analysis combines our findings with the ones of the Chapel Hill Expert Survey (CHES), one of the most widely used and methodologically robust datasets for comparing the ideological positions of European political parties, which collects experts' evaluations of party positions across several policy domains and dimensions. The experts' evaluations are aggregated to produce mean scores for each political group, and measures of reliability—such as variance across expert responses—ensure that data quality remains high. CHES is regularly repeated hence it supports both cross-national comparison and longitudinal analysis, making it well suited for studying how ideological cleavages evolve over time.

Methodologically, we combine three variables, the first two deriving from the CHES data (see Table 4) and the third from the analysis undertaken in the previous sections:

- **Left-Right Ideology:** the overall ideological orientation of each political group, combining economic and sociocultural positions.
- **European Integration Stance:** the degree of support for deeper European integration versus a more intergovernmental or Eurosceptic approach.
- **Voting Distance:** similarity or divergence between political groups in their roll-call votes in the European Parliament.

These variables will allow us to examine whether political groups that are ideologically close to one another—either in left-right terms or in their stance on integration—also tend to vote similarly in parliamentary decisions.

POLITICAL GROUP	LEFT-RIGHT IDEOLOGY	EUROPEAN INTEGRATION
EPP	6.50	8.84
SD	3.82	9.21
PFE	8.47	3.32
ECR	8.21	4.73
RENEW	5.78	8.73
GREEN	2.81	8.63
GUE	1.94	5.87
ESN	9.14	2.89

Comparing the **pairwise distances** between political groups across the three variables (Left-Right ideology, European integration preferences, and roll-call voting), we seek to establish links between ideological stances and actual legislative behaviour of the EP political groups (Table 5).

POLITICAL GROUP		IDEOLOGY	EUROPEAN INTEGRATION	VOTES
EPP	SD	2.67	0.37	2.40
EPP	PFE	1.97	5.52	5.37
EPP	ECR	1.72	4.11	3.00
EPP	RENEW	0.72	0.11	1.38
EPP	GREEN	3.68	0.21	3.45
EPP	GUE	4.56	2.97	4.70
EPP	ESN	2.64	5.95	7.46
SD	PFE	4.64	5.89	5.65
SD	ECR	4.39	4.48	3.53
SD	RENEW	1.96	0.48	1.72
SD	GREEN	1.01	0.58	2.18
SD	GUE	1.88	3.34	3.99
SD	ESN	5.32	6.32	7.48
PFE	ECR	0.25	1.41	3.51
PFE	RENEW	2.69	5.40	5.58
PFE	GREEN	5.65	5.31	5.90
PFE	GUE	6.53	2.55	4.80
FE	ESN	0.67	0.43	3.02
ECR	RENEW	2.43	4.00	3.30
ECR	GREEN	5.40	3.90	4.09
ECR	GUE	6.28	1.14	4.38
ECR	ESN	0.93	1.84	5.50

RENEW	GREEN	2.97	0.10	3.01
RENEW	GUE	3.84	2.86	4.54
RENEW	ESN	3.36	5.84	7.36
GREEN	GUE	0.88	2.76	3.35
GREEN	ESN	6.33	5.74	7.25
GUE	ESN	7.20	2.98	6.06

For a statistical assessment, we are using the Pearson correlation coefficient. For the Left-Right cleavage ($r = 0.53$), a positive but moderate association with voting similarity is identified. For the European Integration one ($r = 0.79$), a much stronger association is discernible. This suggests that groups' positions on European integration explain voting alignment better than ideology does, reinforcing a key literature insight that **European integration has become a distinct and highly influential cleavage** in the EP politics – one that increasingly structures legislative behaviour beyond the traditional Left-Right divide.

Conclusions

The first year of the new EP has been characterised by continuity and change in the voting behaviour of the EP political groups and their subsequent political alignment. Despite the existing high political fragmentation, a relatively stable 'governing coalition' keeps dominating EP politics. This coalition consists of the EPP, S&D and Renew, with the *ad hoc* support of the Greens on specific thematic issues. These three groups feature the highest degree of internal cohesion, with most of their members aligning with the group's main political position and with few outliers expressing diverging views. This enables the formation of relatively comfortable majorities. However, political turbulence does occur occasionally, with political alliances shifting and new voting patterns emerging, integrating at times and on different issues ECR and GUE/NGL in the governing majority. Although these two groups have a lower degree of internal cohesion, they constitute a thematically focused, very useful deposit of potential votes. The most characteristic example of ECR's political 'mainstreaming' is the -so called- "Venezuelan majority", which appears in votes related to the condemnation of authoritarian regimes (such as Venezuela), democracy, and human rights issues as well as EU foreign policy (Russia-Ukraine, Latin America).

Besides ECR and GUE/NGL, the two other groups, Pfi and ESN, also have a low degree of internal cohesion. Not only are they located at a significant distance from the political groups of the 'governing coalition', but they are also characterised by significant internal political fragmentation. This fact is explained by the dominant role of one national political party in their formation and political orientation and indicates the absence of a unifying political identity, more notably for the ESN group. These features explain the great surprise and criticism to the EPP for its choice to align with the Pfi, the ESN and the ECR in the so-called Sustainability Omnibus legislation, passed in November. Although the ECR political history and ideological nature justify (occasional) voting alignments with the EPP, such a broad voting coalition is atypical of the previous EP political dynamics but indicative of the new socio-political dynamics unfolding at both national and European level.

Political pragmatism - even political opportunism - is definitely a factor behind such political decisions. More structurally, from an early analysis, the political cleavage of European integration versus national sovereignty appears more powerful than the more traditional Left-Right one. This element, of course, requires further and more methodologically robust research, but these early findings reinforce the arguments about the growing importance of the EU factor in European but also national politics.

Notes

1 This is the case, for example, with *Eesti Keskerakond* (Estonia), that has two MEPs, one having joined the ECR and the other the RENEW political group. The Bulgarian *Movement for Rights and Freedoms* has three MEPs, two of whom are independent, and one has joined the RENEW group.

2 From the parties in this category, the *Communist Party of Greece* (KKE) shows the greatest deviation from the voting average, as the subsequent analysis will show, followed, at the other side of the political spectrum, by the Polish monarchist and anti-communist party *Konfederacja Korony Polskiej*, and the Slovakian *Republika*, which is part of the ESN group.

3 To enhance readability, the main text includes only graphical summaries of the cohesion of political groups, displayed through scatter plots and boxplots, while the detailed statistical tables and a guide to read them through, containing the corresponding IQR and median values for all groups and thematic areas, are provided in Appendix I and II.

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This policy brief discusses the role of Greece in the India-Middle East-Europe Economic Corridor (IMEC), focusing mainly on those aspects related to infrastructure and ports and the global supply chain. It suggests a series of different actions and highlights different angles that Greece should take into account if it wants to be a major player in the establishment of the Corridor and its gateway to Europe/European Union.

- IMEC will be a game changer in international trade relationships, regional tensions, and political challenges.
- The main obstacles to IMEC's establishment are the conflicts in the Middle East and other major national interests of key actors (such as the Chinese monopoly in the region).
- Focus is given to port infrastructure, as ports are pivotal to the global supply chain. India pays significant attention to its ports, while the Port of Piraeus is the largest port in Eastern Europe.
- The critical role and position of Greece are highlighted, underlying its role as a hub that connects India and the Middle East to Europe.
- Greece needs to invest in infrastructure development, build a skilled workforce, and attract foreign investments.
- Suggestions for establishing a successful commercial corridor between India and Greece are given, focusing on mutual interests and growth opportunities.

Introduction

Greece's involvement in IMEC is a significant element of their strategic partnership, asserting that Greece serves as India's gateway to Europe.

During state visits to India in February 2024, Indian Prime Minister Narendra Modi engaged in discussions with Greek Prime Minister Kyriakos Mitsotakis. The leaders, among other topics, deliberated on enhancing cooperation under the India-Middle East-Europe Economic Corridor (IMEC), which "is a geoeconomic project that propels infrastructure connectivity higher than ever on the geopolitical agenda of global powers" (Sauvignon and Benaglia, 2024). Prime Minister Mitsotakis expressed that Greece's involvement in IMEC is a significant element of their strategic partnership, asserting that Greece serves as India's gateway to Europe. He further emphasized the necessity of achieving peace in the Middle East, stating that stability is essential for any initiative aimed at fostering greater prosperity in the broader region, that would benefit all participating nations. Greece's role is essential to discuss, as it was not in the seven countries (India, France, Germany, Italy, Saudi Arabia, United Arab Emirates, United States) and the EU, which signed the initial IMEC Memorandum of Understanding in September 2023, during the G-20 Summit in India (Gonultas, 2023). Still, the IMEC is highly possible to go through Greece's territory.

This policy brief unveils a series of opportunities and challenges that arise from the establishment of IMEC, focusing on Greece's role and position. It first gives the bigger picture of how the global supply chain works, what role IMEC will play in it, and what infrastructure will be needed. The next section focuses on Greece's role and opportunities, which might enhance Greece's position within this particular cooperation, as well as the country's potential gains. A section on what needs to be done to better prepare for the establishment of the collaboration between India and Greece follows. The final part presents the way forward.

Global supply chains, infrastructure and IMEC's challenges

A supply chain can be defined as a systematic approach focused on the conversion of materials into finished products or services. It may also be perceived as a comprehensive network encompassing all entities engaged in the production and delivery of goods or services to consumers, including suppliers, manufacturers, transporters, distributors, warehouses, wholesalers, retailers, and customers. The modern supply chain is characterized by complexity, dynamism, competitiveness, and flexibility. Standard metrics utilized to evaluate supply chain performance encompass customer satisfaction, service quality, time efficiency, responsiveness, cost-effectiveness, and overall quality of output (Gavalas, 2024).

Supply chain management fundamentally pertains to the oversight and administration of such a network. In the era of globalization, numerous multinational corporations have established partnerships with entities located across the globe. The global supply chain is primarily driven by economic globalization, as companies endeavor to extend their supply chains into international markets. Such global operations typically increase business complexity due to the involvement of a broader array of stakeholders compared to domestic operations, necessitating the navigation of various political, economic, and cultural influences. Global supply chains function as fully integrated operations, thereby leveraging the distinct advantages offered by diverse geographical locations worldwide (Ma, 2020).

The global value chain can be defined as a complex network of international trade and commerce that involves multiple countries, regions, and industries. It relies on various trade routes, including maritime and road transport networks, to facilitate the movement of goods and services (Vasiliadis et al., 2024). Strategic hub ports like Haifa (Israel), Piraeus (Greece), and Red Sea Gateway Terminal (Saudi Arabia) play a crucial role in connecting different regions and facilitating trade. The global value chain is influenced by global trade relationships between countries, including trade agreements, tariffs, and non-tariff barriers, as well as financial ties between countries, such as investment and trade agreements.

The multimodal transport system of IMEC would enable the efficient and cost-effective transportation of goods. The system would also allow for the flexibility to switch between different modes of transport depending on the specific requirements of each shipment. For example, if there is a high demand for speed, rail transport may be preferred, while if there is a high demand for flexibility, road transport may be preferred.

IMEC aims to connect India, the Middle East and Europe, through a railway network, enhancing regional integration and trade. [...] IMEC's success will depend on navigating the complex web of international trade relationships, regional tensions, and political challenges.

The establishment of IMEC would respond to the global value chain by creating a new ship-to-rail transit network that will supplement existing maritime and road transport routes. IMEC aims to connect India, the Middle East and Europe, through a railway network, enhancing regional integration and trade. By reducing costs and increasing speed, IMEC seeks to challenge Beijing's influence in the region and offer an alternative to China's Belt Road Initiative (BRI). However, IMEC's success will depend on navigating the complex web of international trade relationships, regional tensions, and political challenges. China's existing influence in the region, through its financial ties with Arab Gulf states, may limit IMEC's ability to challenge Beijing's dominance, while regional tensions, such as the ongoing conflict in the Middle East, may hinder the progress of IMEC and other regional integration projects (Monroe, 2023).

A major potential obstacle to the IMEC that is to be taken into account is that it does not offer a clear plan to address the Chinese monopoly in the region. The Greek port of Piraeus, a crucial link in the IMEC corridor, is already owned by Cosco, a Chinese shipping company. It is unclear whether India and the United States will attempt to buy stakes in Piraeus and shift the balance of power away from Cosco. Additionally, the deep financial ties between China and the Arab Gulf likely limit the ability of IMEC or any similar development project to challenge Beijing's influence in the region (Khan et al., 2024).

Additionally, another challenge that needs to be considered is the conflict in the Middle East, as shown in the map below, as the area is an integral part of the Corridor. As it is to be expected, the conflict poses significant barriers to the advancement of IMEC. For example, countries that have not normalized their diplomatic relations, like Israel and Saudi Arabia, would have to work together in order to develop railways, as connectivity between the countries of IMEC has to be undisturbed. The same applies to the relations between Jordan and Israel, as the former would be the corridor-country between Israel and Saudi Arabia (Das, 2024).



(IMEC map, source: Vienna International Institute for Middle East Studies)

In terms of infrastructure, the physical aspect of IMEC would include railway lines connecting the United Arab Emirates to Israel via Saudi Arabia and Jordan, as well as electric cables to enhance digital connectivity, and pipes for clean hydrogen export. The multimodal transport system would likely involve a combination of maritime and rail transport. The Greek port of Piraeus would play a crucial role in this system, serving as a hub for cargo transportation from the port of Haifa in Israel to destinations in Europe and beyond. The port's locality on the Mediterranean and its existing connections to European markets make it an ideal location for transshipment and distribution of goods (Datta and Misra, 2024).

For Greece, the port of Piraeus is well-positioned to play a key role in the IMEC project, and Greece should focus on leveraging its strategic location to benefit from the project (Pandya and Leal-Arcas, 2024).

India's Strategic Steps Towards an Enhanced Port Infrastructure

In pursuit of the implementation of the IMEC corridor, India has taken steps from as early as January 2023 to acquire the port of Haifa (Israel). The acquisition was executed by Adani Ports and Special Economic Zone Limited (APSEZ Ltd.), India's largest private port operator and a comprehensive provider of logistics services. This development came as part of a long-term strategy for India's blue maritime economy, as introduced by Prime Minister Narendra Modi during the inauguration of the Global Shipping Summit and International Expo held on October 17, 2023, in Mumbai (Maritime India Summit, 2023). The envisioned horizon of the project is set with a vision towards 2047 (Reuters, 2023).

The plan encompasses several strategic initiatives aimed at enhancing port facilities, promoting sustainable practices, facilitating international collaboration, and executing major projects for the creation of Next Generation Mega Ports, which include the development of international container ports, islands, inland waterways, and multi-modal hubs. The total projected investment for these initiatives is estimated at approximately €900 billion, which is anticipated to generate a substantial number of job opportunities and reduce business operating costs, while mitigating environmental degradation.

Through the plan, India aspires to enhance its cargo handling capacities to 10,000 million metric tons per year by 2047, by addressing the increasing traffic demands and positioning itself among the top five shipbuilding nations of the world, through the establishment of shipbuilding and repair facilities in multiple locations. Over the past decade, the capacity of India's major ports has doubled, the turnaround time for large vessels has been reduced to under 24 hours from the previous 42 hours, and coastal cargo traffic has similarly doubled, reflecting the ongoing modernization of logistics (Gavalas et al., 2022).

What should Greece's role be within IMEC?

As the focus of this brief is to understand the strategic role of Greece in the IMEC's success, this part focuses on highlighting potential advantages of the process. Given the country's geographical location between Asia and Europe, Greece could provide a critical and strategic link between India, the Middle East, and mainland Europe. By playing a key role in facilitating trade, infrastructure development, and regional integration, Greece can benefit economically and political, the latter by strengthening its ties with these regions. Below, some potential roles that Greece could seek to play are listed, as a guide:

- *Logistics Hub:* Greece, particularly the port of Piraeus, can serve as a logistics hub for the IMEC corridor, connecting India and the Middle East to Europe. This could involve the development of new infrastructure, such as warehouses, storage facilities, and transportation networks.
- *Gateway to EU:* As the largest port in Eastern Europe, Piraeus can serve as a gateway to the EU for goods and services coming from India and the Middle East. This would facilitate trade and investment between these regions and the EU.
- *FTA Facilitator:* Greece could play a key role in facilitating an FTA (Foreign Trade Agreement) between India and the EU. As a member of the EU, Greece could help negotiate and implement the FTA, which would benefit Greek businesses and industries.
- *Infrastructure Development:* Greece could invest in developing its infrastructure, such as ports, roads, and railways, to support the growth of trade and commerce between India and the EU. This would also create new economic opportunities for Greek businesses and citizens.
- *Trade Facilitation:* Greece could work with Indian and EU authorities to simplify customs procedures, reduce bureaucratic hurdles, and increase trade facilitation measures to make it easier for goods and services to move across borders.
 - *Investment Attraction:* Greece could attract investment from Indian companies by offering competitive incentives, such as tax breaks, subsidies, or other forms of support. This would help create new economic opportunities and jobs in Greece.

At the same time, strengthening bilateral relationships and improving connectivity between ports can facilitate trade and commerce between Greece and India. This could be a potential step towards advancing the IMEC project, especially if India and Greece can work together to improve the efficiency and reliability of their port operations. Additionally, improving Greek-Indian port relations could also have broader benefits for the region. For example, it could help reduce transportation costs and increase trade volumes between Europe and Asia, which could be beneficial for the economies involved.

Balancing Political Priorities

Since 2016, Greece has cultivated a significant partnership with China, notably through Cosco's investment in the Port of Piraeus. This relationship has significantly helped in the improvement of Greece's economic standing. As such, the country - in theory - would not stand to benefit from severing these ties. This parameter is one that the country oughts to consider, as it seeks to assume a central role in IMEC. Balancing these two priorities will require diplomatic finesse and significant, holistic strategic planning. This may involve renegotiating terms with Cosco to maintain control without straining relations with China.

On the other hand, and provided that the former has been dealt with in a productive manner, Greece stands to benefit significantly if it can leverage the IMEC project to foster regional economic cooperation with neighbors like Turkey, Bulgaria, and Romania.

Navigating these dynamics, however, demands skillful diplomacy to manage the interests of the two major global actors.

Through careful balancing, Greece could position itself as a pivotal player in both IMEC and the broader regional framework, advancing its strategic and economic goals.

Focus on infrastructure and a skilled workforce

Greece's port of Piraeus, being the largest port in Eastern Europe, if IMEC proceeds, is to play a crucial role. [...] it's indeed reasonable to suggest that Greece should enhance its domestic skilled workforce in areas such as logistics, transportation, and infrastructure management.

Greece's port of Piraeus, being the largest port in Eastern Europe, if IMEC proceeds, is to play a crucial role. Therefore, it's likely that Greece will be a major actor in the implementation of the project, particularly in terms of logistics and transportation. In light of this, it's indeed reasonable to suggest that Greece should enhance its domestic skilled workforce in areas such as logistics, transportation, and infrastructure management. This would enable Greece to capitalize on its strategic location, and potentially attract more investment and business opportunities. Moreover, having a skilled workforce would also help Greece to maintain its competitiveness in the region and ensure that it can adapt to any changes or challenges that may arise during the implementation of the IMEC project.

Essential steps to establish a successful commercial corridor between India and Greece

To establish a successful commercial corridor between India and Greece, several essential steps should be undertaken. Firstly, fostering strategic partnerships is crucial; collaboration between Indian and Greek governments, companies, and industries will help identify mutual interests and growth opportunities. Infrastructure development plays a significant role as well, and investment in modernizing and expanding transportation facilities—such as ports, airports, and highways—will facilitate the efficient movement of goods and people.

Negotiating and implementing bilateral trade agreements, particularly FTAs, can serve to reduce tariffs, increase trade volumes, and strengthen economic cooperation. Simplifying customs clearance procedures is also necessary to minimize delays and alleviate bureaucratic obstacles for importers and exporters. Furthermore, efficient logistics and supply chain management systems should be developed to ensure timely and cost-effective delivery of goods. Encouraging foreign investment in both countries is another critical component, which can be achieved by promoting investment opportunities, providing incentives, and offering support services. As per the data provided by India's Ministry of Commerce and Industry, the value of goods imported from India to Greece during the fiscal year 2023-24 amounted to \$1,055.17 million. This sum includes significant products such as aluminum, organic chemicals, transformers, and various other electrical equipment (Embassy of Greece in India, 2024).

Additionally, capacity-building programs that offer training for businesses, entrepreneurs, and policymakers in areas like international trade, logistics, and entrepreneurship are vital for enhancing skills and knowledge. Marketing campaigns that highlight the benefits, attractions, and opportunities of the Corridor can attract potential investors, exporters, and importers.

Risk management strategies must be developed to identify and mitigate potential trade-related risks, such as regulatory differences, currency fluctuations, and security concerns. Establishing a robust digital connectivity infrastructure, including high-speed internet and data transmission networks, would facilitate seamless communication and data exchange between the two countries.

Identifying competitive advantages in areas like production costs, quality standards, or innovation will further attract businesses and investors. It is essential that both governments provide necessary support and incentives to businesses operating within the corridor, including tax breaks, subsidies, or other forms of assistance. Effective communication channels between Indian and Greek businesses, governments, and regulatory bodies should be established to facilitate dialogue and collaboration. Finally, regular monitoring and evaluation of the Corridor's progress will be necessary to assess performance and identify areas for improvement, ensuring its continued success.

The way forward

The discussions between Indian Prime Minister Narendra Modi and Greek Prime Minister Kyriakos Mitsotakis during their state visits highlight the profound potential for collaboration under the India-Middle East-Europe Economic

Corridor. The proposed commercial Corridor serves as a critical link that can enhance trade, connectivity, and regional integration among diverse economies, positioning Greece as a pivotal gateway for India into Europe.

Key actions such as developing strategic partnerships, investing in infrastructure, and negotiating favorable trade agreements are paramount for establishing a robust commercial corridor.

To realize the ambitious goals of IMEC, a multifaceted approach is essential. Key actions such as developing strategic partnerships, investing in infrastructure, and negotiating favorable trade agreements are paramount for establishing a robust commercial corridor. By simplifying customs procedures and improving logistics and supply chain systems, both countries can foster a conducive environment for trade, thereby driving economic growth.

Successful IMEC implementation hinges on achieving regional cooperation, brokering peace initiatives, and creating a balance of power that favors equitable economic engagement among participating nations.

Moreover, the challenges posed by existing geopolitical dynamics, notably China's significant influence in the region and the ongoing conflicts in the Middle East, must be addressed strategically. Successful IMEC implementation hinges on achieving regional cooperation, brokering peace initiatives, and creating a balance of power that favors equitable economic engagement among participating nations.

Greece's role as a logistical hub and trade facilitator is indispensable. The port of Piraeus not only complements the IMEC's shipping routes but also positions Greece favorably to attract investments, foster regional integration, and promote sustainable development practices. Navigating the complexities of international trade relationships while maintaining a focus on green initiatives can enhance IMEC's viability and public acceptance.

The IMEC presents a unique opportunity for India and Greece to strengthen their bilateral ties while playing a significant role in reshaping regional trade dynamics.

The IMEC presents a unique opportunity for India and Greece to strengthen their bilateral ties while playing a significant role in reshaping regional trade dynamics. With concerted efforts in infrastructure development, strategic collaboration, and diplomatic negotiations, the IMEC could become a transformative framework benefiting not just the participating nations but also the broader global economy.

As a final comment, it is likely that the project would require significant investment from governments and private companies in terms of who will pay for the implementation of IMEC. The endorsement of IMEC by several countries, including India, Saudi Arabia and the UAE (and France, Germany, Italy, and the United States), suggests that they may be willing to contribute financially or otherwise to its development. The project's potential economic benefits, such as cutting costs and increasing speed of cargo shipment, could attract private investment and funding from companies and institutions interested in the region's growth and development.

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ProtectEU: Internal Security Strategy, what's in a name?

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Περίληψη

- Η Στρατηγική Εσωτερικής Ασφάλειας της Ε.Ε. έρχεται για να ολοκληρώσει την θεσμική αρχιτεκτονική ασφάλειας της Ένωσης μέχρι το 2030, λειτουργώντας ως ο εσωτερικός κύκλος του διαγράμματος ven που συνθέτουν η Στρατηγική της ΕΕ για την Ένωση Ετοιμότητας (Strategy for Preparedness Union) για την πρόληψη και την αντίδραση σε αναδυόμενες απειλές και κρίσεις και η Λευκή Βίβλος για την Ευρωπαϊκή Άμυνα (European Defence White Paper).
- Το κύριο χαρακτηριστικό της νέας αυτής στρατηγικής είναι η έννοια και ο στόχος της Προστασίας, για αυτό άλλωστε και ονομάζεται ProtectEU.
- Τα ζητήματα ασφάλειας πρέπει να ενσωματωθούν σε όλη τη νομοθεσία, τις πολιτικές και τα προγράμματα της ΕΕ, συμπεριλαμβανομένης της εξωτερικής δράσης της ΕΕ.
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Εισαγωγή

Η Στρατηγική Εσωτερικής Ασφάλειας της Ε.Ε. έρχεται για να ολοκληρώσει την θεσμική αρχιτεκτονική ασφάλειας της Ένωσης μέχρι το 2030. Επί της ουσίας, θα λειτουργήσει ως ο εσωτερικός κύκλος του διαγράμματος ven που συνθέτουν η Στρατηγική για την Ένωση Ετοιμότητας (Strategy for Preparedness Union) για την πρόληψη και την αντίδραση σε αναδυόμενες απειλές και κρίσεις και η Λευκή Βίβλος για την Ευρωπαϊκή Άμυνα (European Defence White Paper). Το κύριο χαρακτηριστικό της νέας αυτής στρατηγικής είναι η έννοια και ο στόχος της Προστασίας, για αυτό άλλωστε και ονομάζεται ProtectEU. Αξίζει να σημειωθεί πως η συγκεκριμένη έννοια έκανε την εμφάνισή της, ως βασικό στοιχείο της εσωτερικής ασφάλειας της Ε.Ε., μετά την κρίση στον Έβρο και την εργαλειοποίηση του μεταναστευτικού ζητήματος από την Τουρκία, καθώς και από την επιρροή των επιπτώσεων που είχε η κρίση της πανδημίας σε μια σειρά τομείς που αφορούν άμεσα ή έμμεσα την εσωτερική ασφάλεια. Δεν είναι άλλωστε τυχαίο πως στην εποχή των πολυκρίσεων έχει μετατοπιστεί η συζήτηση από τα Κράτη Ασφάλειας (Security States) στα Κράτη Προστασίας (Protective States).

Η Στρατηγική, που αποτυπώνει τον επίσημο θεσμικό λόγο της Ένωσης, είναι άλλη μια και μάλιστα ισχυρή απόδειξη, πως η Ε.Ε. έχει αποφασίσει να ενδυναμώσει την διάσταση της ασφάλειας στην παραγωγή πολιτικής, χτίζοντας πάνω στον στόχο που είχε θέσει το 2015- 2016, μετά τις απανωτές τρομοκρατικές επιθέσεις, να καταστήσει την Ε.Ε. μια Ένωση Ασφάλειας. Η στροφή λοιπόν στην ασφάλεια, που προκύπτει τόσο από τον κόσμο της αστάθειας, των κρίσεων και των πολλαπλών απειλών, όσο και από το αίτημα των πολιτών, όπως αυτό έχει διατυπωθεί και στις Ευρωπαϊκές εκλογές, αλλά και στις περισσότερες εθνικές διαδικασίες, είναι έμφασης από τις πρώτες λέξεις αυτού του νέου κείμενου. Δεν πρέπει άλλωστε να παραλείψουμε την αναφορά στο αίσθημα ανασφάλειας των Ευρωπαίων πολιτών. Η Ένωση, τοποθετείται επίσημα για το ψευδοδίλλημα «ασφάλεια vs ελευθερία», χαρακτηρίζοντας την πρώτη ως το θεμέλιο (beckrock) πάνω στο οποίο έχουν δομηθεί όλες οι ελευθερίες. Είναι χαρακτηριστική η φράση «η δημοκρατία, το κράτος δικαίου, τα θεμελιώδη δικαιώματα, η ευημερία των Ευρωπαίων, η ανταγωνιστικότητα και η ανάπτυξη - όλα εξαρτώνται από την ικανότητά μας να παρέχουμε μια βασική εγγύηση ασφάλειας», η οποία και εισάγει και στον τομέα της εσωτερικής ασφάλειας την έννοια του παρόχου ασφάλειας (Security provider) που το συναντήσαμε για πρώτη φορά στην Στρατηγική Πυξίδα. Ωστόσο, η Ένωση δεν φιλοδοξεί, δεν θα μπορούσε να το κάνει άλλωστε, να αντικαταστήσει τα κράτη- μέλη ως τους βασικούς παρόχους ασφάλειας, για αυτό και ο βασικός στόχος της Στρατηγικής είναι η ενίσχυση των κρατών μελών για να παρέχουν στους πολίτες ασφάλεια και παράλληλα η δημιουργία μιας ευρωπαϊκής κουλτούρας συντονισμού και διακυβέρνησης του τομέα της εσωτερικής ασφάλειας.

Η Ε.Ε. έχει εδώ και χρόνια αναδείξει το αδιάρρηκτο μεταξύ εξωτερικής και εσωτερικής ασφάλειας, στοιχείο που χαρακτηρίζει όλες τις στρατηγικές και θεσμικά κείμενα, εσωτερικής και εξωτερικής κατεύθυνσης, που παράγει. Η Στρατηγική έρχεται στον απόηχο των πολέμων στην Ουκρανία και στη Μέση Ανατολή, αλλά και της έντασης των υβριδικών απειλών. Είναι λοιπόν λογικό να έχει επηρεαστεί από την εισβολή της Ρωσίας στην Ουκρανία και από τις υβριδικές επιθέσεις που έχει αυτή εξαπολύσει εναντίον της Ουκρανίας και των υβριδικών επιχειρήσεων εναντίον των κρατών- μελών της Ε.Ε. Αυτός είναι λοιπόν ο λόγος που οι υβριδικές απειλές και η απειλή της Ρωσίας είναι οι πρώτες που αναφέρονται στην αντίστοιχη ενότητα της Στρατηγικής. Πέρα από τις θολές γραμμές πολέμου και ειρήνης- που είναι και συστατικό χαρακτηριστικό των υβριδικών απειλών, η απειλή από την συγκεκριμένη πρακτική της Ρωσίας αναδεικνύει πως η εσωτερική ασφάλεια απειλείται πλέον σημαντικά από έναν εξωτερικό κακόβουλο δρώντα, ο οποίος μπορεί να είναι και κρατικός, μια ακόμη σημαντική αλλαγή στην αναγνώριση και στην αξιολόγηση των απειλών. Στην ευρύτερη δεξαμενή των υβριδικών απειλών μπορούμε να εντάξουμε και την εργαλειοποίηση του μεταναστευτικού, την οποία η Στρατηγική χαρακτηρίζει “οπλοποίηση” (weaponisation).

Οι Αρχές: η ασφάλεια στο επίκεντρο

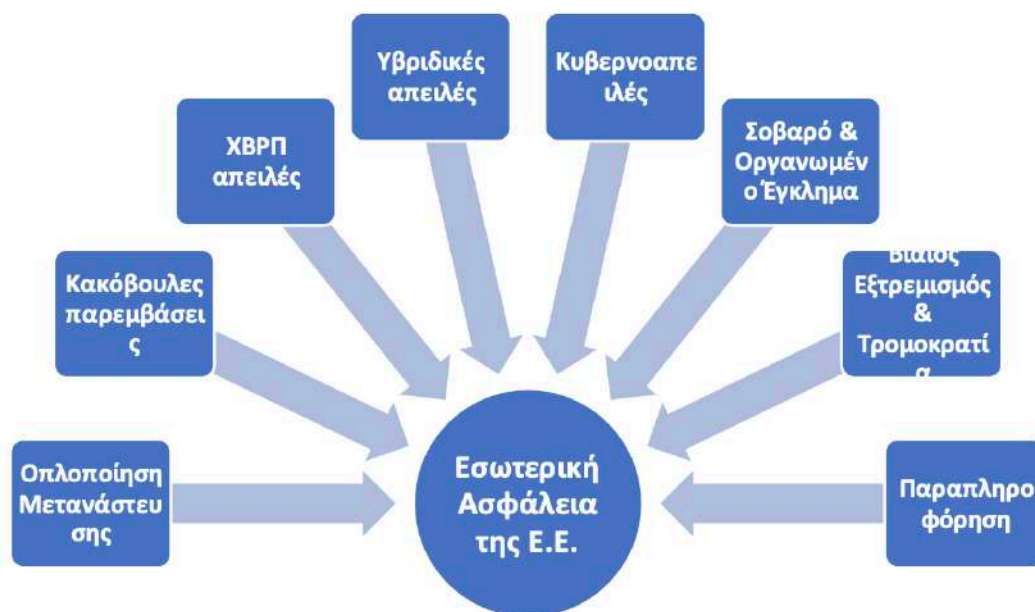
Η Στρατηγική εδράζεται σε τρεις βασικές αρχές και έχει μεγάλο ενδιαφέρον πως οι συγκεκριμένες ξεφεύγουν από τις κλασικές κανονιστικές αναφορές σε νόρμες και δικαιώματα που είχαν τα κείμενα της Ένωσης στο παρελθόν. Αντίθετα, λειτουργούν συμπληρωματικά με το σεβασμό στο κράτος δικαίου και στις θεμελιώδεις ελευθερίες, ενώ είναι στοχευμένες στην ανάδειξη της προσέγγισης της Ένωσης στην ασφάλεια και μάλιστα στην εσωτερική. Ειδικότερα:

- 1) **Θέτει τη φιλοδοξία μιας αλλαγής κουλτούρας για την ασφάλεια.** Χρειάζεται μια προσέγγιση του συνόλου της κοινωνίας (Whole of Society Approach) στην οποία θα συμμετέχουν όλοι οι πολίτες και τα ενδιαφερόμενα μέρη, συμπεριλαμβανομένης της Κοινωνίας των Πολιτών, της ερευνητικής κοινότητας, του ακαδημαϊκού κόσμου και των ιδιωτικών φορέων. Ως εκ τούτου, οι δράσεις στο πλαίσιο της στρατηγικής ακολουθούν μια ολοκληρωμένη προσέγγιση με πολλούς φορείς όπου αυτό είναι εφικτό.
- 2) **Τα ζητήματα ασφάλειας πρέπει να ενσωματωθούν σε όλη τη νομοθεσία, τις πολιτικές και τα προγράμματα της Ε.Ε.,** συμπεριλαμβανομένης της εξωτερικής δράσης της Ένωσης. Η νομοθεσία, οι πολιτικές και τα προγράμματα θα πρέπει να προετοιμαστούν, να επανεξεταστούν και να εφαρμοστούν έχοντας κατά νου τη διάσταση της ασφάλειας, διασφαλίζοντας ότι λαμβάνονται υπόψη οι απαραίτητες πτυχές ασφαλείας ώστε να προωθηθεί μια συνεκτική και συνολική προσέγγιση της ασφάλειας.
- 3) **Μια ασφαλής, προστατευμένη και ανθεκτική Ευρώπη απαιτεί σοβαρές επενδύσεις από την Ε.Ε., τα κράτη μέλη της και τον ιδιωτικό τομέα.** Οι προτεραιότητες και οι δράσεις που καθορίζονται στην παρούσα στρατηγική απαιτούν επαρκείς ανθρώπινους και οικονομικούς πόρους για να εξασφαλιστεί η εφαρμογή τους. Όπως ορίζεται στην ανακοίνωση για την πορεία προς το επόμενο πολυετές δημοσιονομικό πλαίσιο, η Ευρώπη θα χρειαστεί να αυξήσει τις δημόσιες δαπάνες για την ασφάλεια και να προωθήσει την έρευνα και τις επενδύσεις στον τομέα της ασφάλειας, ενισχύοντας τη στρατηγική της αυτονομία.

Οι Απειλές: η Ρωσία, το οργανωμένο έγκλημα, οι μοναχικοί δρώντες και τα deep fakes

Η Στρατηγική αποτυπώνει μια ευρεία λίστα απειλών, οι οποίες σε σημαντικό βαθμό επηρεάζονται και από την κατάσταση στα γειτονικά περιφερειακά υποσυστήματα της Ε.Ε. και παράλληλα, έχουν πολλές αλληλοσυνδέσεις, με τις υβριδικές απειλές να εμπεριέχουν πολλές από τις επιμέρους απειλές που αναδεικνύει ως κρίσιμες το κείμενο.

1. Υβριδικές απειλές και άλλες εχθρικές ενέργειες
2. Κυβερνοαπειλές και κυβερνοεπιθέσεις
3. Κακόβουλη χρήση των αναδυόμενων τεχνολογιών
4. Οπλοποίηση της Μετανάστευσης
5. Κακόβουλες παρεμβάσεις και εξαρτήσεις στις εφοδιαστικές αλυσίδες
6. Χημικές- Βιολογικές- Ραδιενεργές και Πυρηνικές (ΧΒΡΠ) απειλές
7. Σοβαρό και Οργανωμένο Έγκλημα
8. Βίαιος Εξτρεμισμός και Τρομοκρατία
9. Παραπληροφόρηση



Σχήμα 1: Η αποτύπωση των απειλών στη Στρατηγική Εσωτερικής Ασφάλειας

Οι 4+1 Πυλώνες Ανάπτυξης της Στρατηγικής

Ακολουθώντας το κλασικό μοντέλο διάρθρωσης των στρατηγικών ασφάλειας της Ε.Ε. και αυτή βασίζεται σε τέσσερις κεντρικούς πυλώνες που λειτουργούν ως ομπρέλες δράσεων: πρόβλεψη (anticipate), εντοπισμός (detect), πρόληψη (prevent) και απάντηση/ ανταπόκριση (respond). Παράλληλα, η φιλοσοφία των δράσεων περιλαμβάνει και έναν πέμπτο πυλώνα, ο οποίος ωστόσο τέμνει και τους τέσσερις άλλους, την οικοδόμηση ανθεκτικότητας (building resilience).



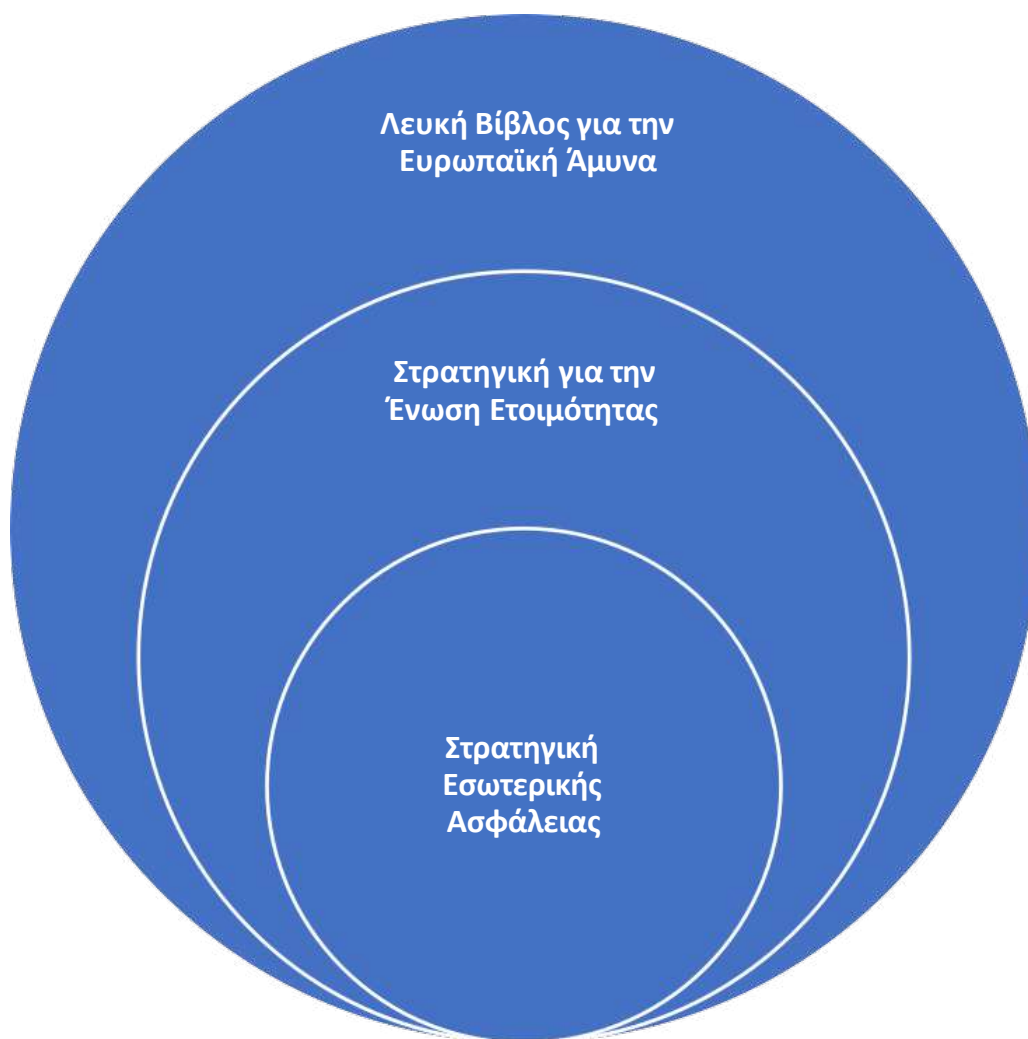
Σχήμα 2: Οι Πυλώνες ανάπτυξης των δράσεων της Στρατηγικής

Τι πρέπει να προστατευτεί;

Πρώτα και κύρια τους πολίτες. Οι Ευρωπαίοι θα πρέπει να μπορούν να ζήσουν χωρίς φόβο, στους δρόμους, στο σπίτι, σε δημόσιους χώρους, στο μετρό ή στο διαδίκτυο. Η προστασία των ανθρώπων, ιδίως εκείνων που είναι πιο ευάλωτοι σε επιθέσεις, που τείνουν να επηρεάζουν δυσανάλογα τα παιδιά, τις γυναίκες και τις μειονότητες, συμπεριλαμβανομένων των Εβραϊκών και Μουσουλμανικών κοινοτήτων, βρίσκεται στο επίκεντρο του έργου της Ε.Ε. για την ασφάλεια. Αυτό είναι απαραίτητο για την οικοδόμηση ανθεκτικών και συνεκτικών κοινωνιών. Πέραν της καθημερινότητας των πολιτών, η Ε.Ε. δίνει έμφαση στην προστασία και στην ανθεκτικότητα των κρίσιμων υποδομών/ οντοτήτων, στον κυβερνοχώρο, στα σύνορα, στις μεταφορές, στις εφοδιαστικές αλυσίδες και κυρίως σε αυτές των τεχνολογιών πληροφορικής και επικοινωνιών.

Συμπληρωματικότητα με άλλες Στρατηγικές και Πρωτοβουλίες

Η Στρατηγική για την Εσωτερική Ασφάλεια συμπληρώνει και συλλειτουργεί με τη Στρατηγική για την Ένωση Ετοιμότητας, η οποία καθορίζει μια ολοκληρωμένη προσέγγιση έναντι όλων των κινδύνων για την ετοιμότητα της Ένωσης για συγκρούσεις, ανθρωπογενείς και φυσικές καταστροφές και κρίσεις, και τη Λευκή Βίβλο για την Ευρωπαϊκή Αμυντική Ετοιμότητα 2030, η οποία υποστηρίζει την ανάπτυξη και την απόκτηση αμυντικών δυνατοτήτων από την Ε.Ε. για την αντιμετώπιση ξένων αντιπάλων και απειλών. Το επόμενο διάστημα η Επιτροπή θα προτείνει επίσης μια Ευρωπαϊκή Ασπίδα για τη δημοκρατία με στόχο την ενίσχυση της δημοκρατικής ανθεκτικότητας της Ένωσης. Μαζί, αυτές οι πρωτοβουλίες, θέτουν ένα όραμα για μια ασφαλή, προστατευμένη και ανθεκτική Ε.Ε., συνθέτοντας τη νέα θεσμική αρχιτεκτονική ασφάλειας της Ένωσης.



Σχήμα 3: Η Συμπληρωματική λειτουργία των νέων θεσμικών κειμένων στους τομείς ασφάλειας και άμυνας

Οι Σημαντικότερες Προτάσεις

Η Στρατηγική περιλαμβάνει ένα ευρύ κατάλογο δράσεων και προτάσεων πολιτικής. Μεταξύ αυτών ξεχωρίζουν οι ακόλουθες:

- ✓ Με βάση τις διάφορες αξιολογήσεις κινδύνου και απειλών που παράγονται σε επίπεδο Ε.Ε. και για συγκεκριμένους τομείς, η Επιτροπή θα προετοιμάζει τακτικές **αναλύσεις απειλών εσωτερικής ασφάλειας της Ένωσης** για τον εντοπισμό των κύριων προκλήσεων ασφάλειας, με σκοπό την ενημέρωση των προτεραιοτήτων πολιτικής. Αυτές θα βοηθήσουν στην ανάπτυξη μιας ευέλικτης και υπεύθυνης **πολιτικής εσωτερικής ασφάλειας** που αντιμετωπίζει αποτελεσματικά τις εξελισσόμενες απειλές, προστατεύει καλύτερα άτομα και επιχειρήσεις από επιθέσεις και επιτρέπει στοχευμένες παρεμβάσεις πολιτικής εγκαίρως.
- ✓ Η εμπιστοσύνη και ο ασφαλής χειρισμός είναι απαραίτητα για την ανταλλαγή πληροφοριών, και αυτό απαιτεί αξιόπιστη και ασφαλή υποδομή. Τα θεσμικά όργανα, οι φορείς και οι οργανισμοί της Ε.Ε. πρέπει να **διασφαλίσουν την ικανότητά τους να χρησιμοποιούν ασφαλείς διαύλους επικοινωνίας για την ανταλλαγή ευαίσθητων και διαβαθμισμένων πληροφοριών** μεταξύ τους και με τα κράτη μέλη. **Οι επενδύσεις σε διαλειτουργικά ασφαλή συστήματα και αξιόπιστη τεχνολογία** θα ενισχύσουν την αυτονομία της Ένωσης και θα ενδυναμώσουν την ικανότητα της να διαχειρίζεται κρίσεις και να διασφαλίζει επιχειρησιακή ανθεκτικότητα.
- ✓ Οι αξιοποιήσιμες πληροφορίες, τις οποίες τα κράτη μέλη ενθαρρύνονται να ενισχύσουν περαιτέρω μέσω της Ενιαίας Ικανότητας Ανάλυσης Πληροφοριών (SIAC), ως το μοναδικό σημείο εισόδου για τις πληροφορίες των κρατών μελών, είναι ζωτικής σημασίας για την αξιολόγηση και την αντιμετώπιση των απειλών, εν τέλει για την ενημέρωση των πολιτικών και νομοθετικών δράσεων. **Πρέπει να αξιοποιηθεί η ανάλυση βάσει πληροφοριών και οι αξιολογήσεις απειλών σε επίπεδο Ε.Ε. αποτελεσματικότερα και συνεργατικά.**
- ✓ Η Επιτροπή θα προτείνει μια **φιλόδοξη αναθεώρηση της εντολής της Ευροπόλ, για να τη μετατρέψει σε μια πραγματικά επιχειρησιακή αστυνομική υπηρεσία, που θα υποστηρίζει καλύτερα τα κράτη μέλη.** Στόχος είναι να ενισχυθεί η τεχνολογική τεχνογνωσία και η ικανότητα της να υποστηρίζει τις εθνικές υπηρεσίες επιβολής του νόμου, να ενδυναμώσει τον συντονισμό με άλλες υπηρεσίες και φορείς και με τα κράτη μέλη, να ενισχύσει τις στρατηγικές συνεργασίες με χώρες εταίρους και τον ιδιωτικό τομέα και να εξασφαλίσει τον ενισχυμένο εποπτικό ρόλο της Ευροπόλ.
- ✓ Η Επιτροπή θα αναπτύξει μια **συνολική προσέγγιση foresight για την εσωτερική ασφάλεια σε επίπεδο Ε.Ε.,** βασιζόμενη στις βέλτιστες πρακτικές που προσδιορίζονται σε εθνικό επίπεδο. Αυτή η προσέγγιση θα υποστηρίξει τη χάραξη πολιτικής και θα καθοδηγήσει τις επενδύσεις στη σχετική έρευνα και καινοτομία στον τομέα της ασφάλειας που χρηματοδοτείται από την Ε.Ε.
- ✓ Η Ε.Ε. θα συνεχίσει να επενδύει, μέσω της χρηματοδοτούμενης έρευνας και καινοτομίας στον τομέα της ασφάλειας, στην ανάπτυξη καινοτόμων εργαλείων και λύσεων για την αντιμετώπιση των απειλών κατά της ασφάλειας με ταυτόχρονη τήρηση των κανόνων και των θεμελιωδών δικαιωμάτων της Ε.Ε. **Η Επιτροπή θα πρέπει να υποστηρίξει τη μετάβαση από την έρευνα στην ανάπτυξη, για να διασφαλίσει την αποτελεσματική αξιοποίηση αυτών των σύγχρονων δυνατοτήτων, με προτεραιότητα στις νέες τεχνολογίες όπως η τεχνητή νοημοσύνη.** Αυτή η προσέγγιση θα πρέπει να περιλαμβάνει εκπαίδευση για τη βελτίωση της χρήσης συστημάτων τεχνητής νοημοσύνης και άλλων τεχνικών δυνατοτήτων από τις αρχές επιβολής του νόμου και τις δικαστικές αρχές.
- ✓ **Να αξιοποιηθεί περαιτέρω η δυνατότητα διπλής χρήσης των τεχνολογιών και προς τις δύο κατευθύνσεις (από την πολιτική στην άμυνα και από την άμυνα στην πολιτική).**
- ✓ **Ενίσχυση της διασυνοριακής συνεργασίας με έμφαση στην ανταλλαγή δεδομένων μεταξύ των υπηρεσιών επιβολής του νόμου και στη διαμόρφωση μιας κοινής κουλτούρας επιβολής του νόμου σε επίπεδο Ε.Ε.**
- ✓ Η ενίσχυση της ανθεκτικότητας και της ασφάλειας των εξωτερικών συνόρων είναι ζωτικής σημασίας για την αντιμετώπιση υβριδικών απειλών, όπως η οπλοποίηση της μετανάστευσης, για την πρόληψη της εισόδου παραγόντων απειλών και παράνομων αγαθών στην Ε.Ε. και για την αποτελεσματική καταπολέμηση του διασυνοριακού εγκλήματος και της τρομοκρατίας. Κρίσιμη παράμετρος για την ασφαλή διαχείριση των συνόρων αποτελεί η βέλτιστη αξιοποίηση των συστημάτων της Ε.Ε. και κυρίως των Entry-Exit System (EES), European Travel Authorisation System (ETIAS) και του Visa Information System (VIS).
- ✓ **Ίδρυση Τελωνειακής Αρχής της Ε.Ε. και ενίσχυση της Eurojust, του EPPO, του OLAF, του AMLA και κυρίως της FRONTEX, με στόχο η τελευταία να φτάσει στους 30.000 συνοριοφύλακες.**
- ✓ **Ενίσχυση του ρόλου της Ε.Ε. ως παγκόσμιου δρώντα ασφάλειας με έμφαση στην περιφερειακή και επιχειρησιακή συνεργασία, στην αξιοποίηση εργαλείων και μέσων της ΚΕΠΠΑ, στην ανταλλαγή πληροφοριών και στο σύστημα θεωρήσεων αδειών εισόδου.**

Συγκρίνοντας τις Στρατηγικές: Όλα αλλάζουν και όλα ίδια μένουν;

Σε μια προσπάθεια σύγκρισης των προβλέψεων και της φιλοσοφίας των τεσσάρων πλέον θεσμικών κειμένων της Ε.Ε. για την εσωτερική ασφάλεια, το πρώτο σημείο που θα πρέπει να αναδειχτεί είναι τι ρόλο αποτυπώνει η ίδια η Ένωση για αυτή σε αυτά τα κείμενα. Οι δύο πρώτες Στρατηγικές- 2010 και 2015- παρουσιάζουν την Ε.Ε. ως έναν μηχανισμό χαλαρής υποστήριξης και συντονισμού των μέσων των κρατών- μελών. Από το 2020, μέσα από το τότε σχήμα της Ένωσης Ασφάλειας, η Ε.Ε. αρχίζει να ενισχύει το ρόλο που θέλει η ίδια να διαδραματίσει στην πολιτική εσωτερικής ασφάλειας με την αρμοδιότητα όμως να τονίζεται πως παραμένει στα κράτη- μέλη. Πρέπει να φτάσουμε στο 2025 για να δούμε θεσμικά αποτυπωμένη την πρόθεση της Ένωση να λειτουργήσει ως πάροχος ασφάλειας και να έχει έναν ενισχυμένο ρόλο, πάντα σε συνεργασία με τα κράτη-μέλη.

Το δεύτερο σημείο είναι οι αρχές που διέπουν τις στρατηγικές. Οι δύο πρώτες είναι θεσμικά κείμενα που βασίζονται πλήρως στην αντίληψη για την Ε.Ε. ως μια κανονιστική δύναμη που δίνει το παράδειγμα μέσω της λειτουργίας της ως εγγυητής δικαιωμάτων και ελευθεριών. Είναι χαρακτηριστικό πως ακόμη και η δράση της Ε.Ε. στο εξωτερικό, αποτυπώνεται ως ηγεσία μέσω του κανονιστικού παραδείγματος. Η Στρατηγική του 2020 αλλάζει την προσέγγιση, σηματοδοτώντας μια διαφορετική φιλοσοφία με την σχετικά αναφορά : «η ασφάλεια δεν είναι μόνο η βάση για την προσωπική ασφάλεια, προστατεύει επίσης τα θεμελιώδη δικαιώματα και βάζει τα θεμέλια για εμπιστοσύνη και δυναμισμό στην οικονομία, την κοινωνία και τη δημοκρατία μας». Η ριζοσπαστική όμως αλλαγή είναι στο πρόσφατο κείμενο Στρατηγικής, όπου η ασφάλεια αναδεικνύεται ως κύρια συνισταμένη στην οριζόντια παραγωγή πολιτικής: «μια αλλαγή στη νοοτροπία μας για την εσωτερική ασφάλεια. Θα εργαστούμε για να συμβάλουμε στην προώθηση μιας νέας κουλτούρας ασφάλειας της Ε.Ε., όπου τα ζητήματα ασφάλειας λαμβάνονται υπόψη σε όλη τη νομοθεσία, τις πολιτικές και τα προγράμματά μας - από την έναρξη έως την εφαρμογή. Και όπου η συνεργασία σε όλους τους τομείς πολιτικής μας επιτρέπει να ανοίξουμε νέους δρόμους. Αυτό δεν είναι καθήκον μόνο ενός θεσμικού οργάνου, μιας κυβέρνησης ή ενός παράγοντα. Είναι κοινή προσπάθεια της Ευρώπης».

2010	2015	2020	2025
• Σοβαρό & Οργανωμένο Έγκλημα • Τρομοκρατία • Κυβερνοέγκλημα • Χημικές- Βιολογικές- Ραδιενεργές και Πυρηνικές (ΧΒΡΠ) απειλές • Ανθρωπογενείς & Φυσικές Καταστροφές	• Τρομοκρατία • Οργανωμένο Έγκλημα • Κυβερνοέγκλημα • Χημικές- Βιολογικές- Ραδιενεργές και Πυρηνικές (ΧΒΡΠ) απειλές	• Κυβερνοέγκλημα • Παράνομο περιεχόμενο στο διαδίκτυο • Χημικές- Βιολογικές- Ραδιενεργές και Πυρηνικές (ΧΒΡΠ) απειλές • Υβριδικές Απειλές • Τρομοκρατία & Ριζοσπαστικοποίηση • Οργανωμένο Έγκλημα	• Υβριδικές απειλές και άλλες εχθρικές ενέργειες • Κυβερνοαπειλές και κυβερνοεπιθέσεις • Κακόβουλη χρήση των αναδυόμενων απειλών • Οπλοποίηση της Μετανάστευσης • Κακόβουλες παρεμβάσεις και εξαρτήσεις στις εφοδιαστικές αλυσίδες • Χημικές- Βιολογικές- Ραδιενεργές και Πυρηνικές (ΧΒΡΠ) απειλές • Σοβαρό και Οργανωμένο Έγκλημα • Βίαιος Εξτρερισμός και Τρομοκρατία • Παραπληροφόρηση

Σχήμα 4: Η εξέλιξη των απειλών στις στρατηγικές εσωτερικής ασφάλειας της Ε.Ε. (2010- 2025).

Η αποτύπωση των απειλών είναι ένα ακόμη πεδίο στο οποίο μπορούμε να δούμε διαφοροποιήσεις στα κείμενα, άρα και στην προσέγγιση της Ε.Ε. Το 2010 δεν χρησιμοποιείται καν ο όρος απειλές, αλλά προκλήσεις ασφάλειας. Από αυτό το πρώτο κείμενο, ως και το πρόσφατο, υπάρχουν τέσσερις απειλές που παραμένουν σταθερές (τρομοκρατία, οργανωμένο έγκλημα, κυβερνοέγκλημα και ΧΒΡΠ απειλές). Στην πρώτη στρατηγική υπάρχει αναφορά στις ανθρωπογενείς και φυσικές καταστροφές. Είναι η εποχή που η Ε.Ε. έχει προτάξει τη σύνδεση της κλιματικής κρίσης με την ασφάλεια, τόσο σε εσωτερικό, όσο και εξωτερικό επίπεδο, για αυτό και βλέπουμε τις φυσικές καταστροφές στην αποτύπωση των απειλών, αλλά και προτάσεις για την ανάγκη δημιουργίας υποδομής για τη διαχείριση κρίσεων και καταστροφών. Αυτή η πρόβλεψη υλοποιήθηκε με τη δημιουργία τόσο του μηχανισμού διαχείρισης κρίσεων, όσο και του μηχανισμού πολιτικής προστασίας, ο οποίος αυτονομήθηκε από το πεδίο της εσωτερικής ασφάλειας, για αυτό και στα κείμενα που ακολούθησαν δεν υπάρχει αναφορά στις φυσικές καταστροφές. Δεν πρέπει βέβαια να παραβλέπουμε και το γεγονός πως από το 2014 με την ενίσχυση της ISIS και τις απανωτές τρομοκρατικές επιθέσεις σε διάφορες ευρωπαϊκές χώρες, η απειλή της διεθνούς ισλαμιστικής τρομοκρατίας έγινε κυρίαρχη για την Ένωση, κάτι που αποτυπώνεται και στις στρατηγικές εσωτερικής ασφάλειας και κυρίως σε αυτή του 2015. Διαφοροποιήσεις βλέπουμε και στην εξέλιξη, άρα και στην πρόσληψη από πλευράς Ε.Ε., της απειλής της τρομοκρατίας. Από την κυριαρχία της ισλαμιστικής τρομοκρατίας και των αλλοδαπών τρομοκρατών μαχητών το 2015 περάσαμε στον ανιστυσητικό βίαιο εξτρεισμό και στους μοναχικούς δρώντες το 2025, με το ρόλο της ιδεολογίας να υποχωρεί σε μεγάλο βαθμό. Αντίστοιχα, διαφοροποίηση μπορούμε να δούμε και στην πρόσληψη των υβριδικών απειλών. Στο κείμενο του 2020, στην περίοδο που κυριαρχούσε η κρίση της πανδημίας του C-19 η έμφαση δίνονταν στην εργαλειοποίηση της κρίσης ως μορφή υβριδικής απειλής, καθώς και στο ρόλο των μη κρατικών δρώντων. Το 2025 είναι ξεκάθαρη η αναφορά στις υβριδικές απειλές και στις κακόβουλες παρεμβάσεις από κρατικούς δρώντες και πρώτιστα από τη Ρωσία. Ως μορφή υβριδικής απειλής αναφέρεται και η οπλοποίηση της μετανάστευσης, αναδεικνύοντας με αυτό τον τρόπο την μετεξέλιξη των επιπτώσεων ασφαλείας και των απειλών που μπορούν να συνδεθούν με τη μετανάστευση, διάσπαση και ανάγνωση που δεν υπήρχε για χρόνια, με την κρίση στον Έβρο, να είναι αυτή που άλλαξε πλήρως την κατάσταση, σηματοδοτώντας τη μετάβαση σε μια Ένωση που πρέπει να προστατεύει τους πολίτες της.

Από πλευράς προτάσεων και απαντήσεων μπορούμε να διακρίνουμε μια συνέχεια στο σύνολο των στρατηγικών και κυρίως στους τομείς της διασυννοριακής συνεργασίας και της ανταλλαγής πληροφοριών, της αξιοποίησης των εξωτερικών δράσεων και κυρίως των συμφωνιών σύνδεσης και εταιρικής συνεργασίας, αλλά και των μέσων και εργαλείων της ΚΕΠΠΑ, στη συνεργασία με τον ιδιωτικό τομέα και κυρίως στο πεδίο του κυβερνοχώρου και των νέων τεχνολογιών, της χρήσης εκτιμήσεων κινδύνων και απειλών, της επένδυσης στην έρευνα και στην καινοτομία στον τομέα της ασφάλειας, της λήψης μέτρων για την προστασία των κρίσιμων υποδομών και των δημοσίων χώρων και της λήψης μέτρων για την υποστήριξη των θυμάτων. Από το 2020, παρατηρούμε μια μετακίνηση από την πρόληψη σε ένα προηγούμενο στάδιο, αυτό της πρόγνωσης, το οποίο συνδέεται με τον μακροπρόθεσμο σχεδιασμό και με μεθοδολογίες και εργαλεία, όπως το Foresight, τα συστήματα έγκαιρης αναγνώρισης και προειδοποίησης, η σύνδεση με την ερευνητική κοινότητα και τη νέα γνώση, καθώς και η χρήση νέων τεχνολογιών, όπως η τεχνητή νοημοσύνη. Στην πρόσφατη Στρατηγική ξεχωρίζει η αναφορά στην πρόθεση μετεξέλιξης της Eurpol σε μια επιχειρησιακή ευρωπαϊκή αστυνομία.

Συμπεράσματα

Η Ε.Ε. και τα κράτη- μέλη χρειάζονταν μια νέα στρατηγική για την εσωτερική ασφάλεια, καθώς το πεδίο των απειλών, αλλά και γενικότερα η γεωστρατηγική συνθήκη έχει μεταβληθεί καταλυτικά από το 2020, όταν και δημοσιεύτηκε η προηγούμενη στρατηγική για την Ένωση Ασφάλειας. Είναι σημαντική η αναφορά στη μετατροπή και στη λειτουργία της Ένωσης ως παρόχου ασφάλειας, μια πρόβλεψη που συμβαδίζει με την ρεαλιστική στροφή που κάνει η Ε.Ε. μετά την εισβολή της Ρωσίας στην Ουκρανία και είχε πρώτη φορά αποτυπωθεί στο κείμενο της Στρατηγικής Πυξίδας, στην εξωτερική δηλαδή διάσταση της ασφάλειας. Η έννοια του παρόχου ασφάλειας συνδέεται άλλωστε άμεσα με τον στόχο η Ένωση να προστατεύει τους πολίτες και τα σύνορά της, μια μεταστροφή που ξεκίνησε από τον τομέα της ασφάλειας των συνόρων και τις πολυκρίσεις που αντιμετωπίζει ο κόσμος μας τα τελευταία πέντε τουλάχιστον χρόνια, πέρασε μέσα από τον πόλεμο της Ουκρανίας και την απειλή της Ρωσίας και σαφώς επηρεάστηκε από τα νέα δεδομένα που φέρνει για την ευρωπαϊκή ασφάλεια η Διακυβέρνηση Τράμπ. Η νέα αυτή προσέγγιση της Ένωσης στην ασφάλεια αποτυπώνεται με τον πλέον χαρακτηριστικό τρόπο τόσο στις αρχές που διέπουν αυτό το κείμενο στρατηγικής, όσο και γενικότερα στο πολιτικό πλαίσιο και αφήγημα για την εσωτερική ασφάλεια της Ε.Ε. Η Ένωση για πρώτη φορά βάζει στην εξίσωση του κανονιστικού της χαρακτήρα τόσο έντονη έμφαση στην ασφάλεια. Κάτι που αναμενόμενα φαίνεται και στην αποτύπωση, αλλά και μερική ιεράρχηση των απειλών.

Ιδιαίτερως σημαντική είναι η αναφορά σε έναν πιο διευρυμένο και ενεργό ρόλο της Ε.Ε., περιορίζοντας με αυτό τον τρόπο τον βαθμό εξάρτησης από την επιθυμία των κρατών- μελών, αλλά και η πρόβλεψη για ενίσχυση της χρηματοδότησης στον τομέα της εσωτερικής ασφάλειας, όπου το κείμενο κάνει αναφορά και στις δυνατότητες συνέργειας ενωσιακού, αλλά και δημοσίου- σε επίπεδο κρατών- μελών- και ιδιωτικού τομέα (PPP- Public Private Partnerships).

Ωστόσο, η αισιοδοξία πρέπει να είναι συγκρατημένη. Είναι η τέταρτη στρατηγική εσωτερικής ασφάλειας που εκδίδει η Ε.Ε. από το 2010, όταν και πρώτη φορά εξέφρασε τον στόχο να δημιουργηθεί ένα ευρωπαϊκό μοντέλο εσωτερικής ασφάλειας. Δεκαπέντε όμως χρόνια μετά η πρόοδος σε αυτή την κατεύθυνση είναι ξεκάθαρα περιορισμένη. Η πρόταση για την μετεξέλιξη της Europol σε μια πραγματική επιχειρησιακή υπηρεσία είναι προς την σωστή κατεύθυνση και απαραίτητη, ιδιαίτερα για να συστηματοποιηθεί η ανταλλαγή πληροφοριών και να αντιμετωπιστούν αποτελεσματικά ξεκάθαρα διασυνοριακές απειλές όπως το οργανωμένο έγκλημα και η τρομοκρατία, η εμπειρία μας όμως από την αντίστοιχη φιλοδοξία και τις μεγάλες καθυστερήσεις στην μετεξέλιξη της FRONTEX σε Ευρωπαϊκή Συνοριοφυλακή, σίγουρα προβληματίζει. Ακόμη και στην περίπτωση του μηχανισμού πολιτικής προστασίας, ο οποίος σαν δομή και διαδικασία έχει αναπτυχθεί αρκετά, σε επιχειρησιακό επίπεδο η δυνατότητα του παραμένει ακόμη περιορισμένη.

Ένα ακόμη ζήτημα που χρήζει ιδιαίτερης προσοχής είναι ο διαφοροποιημένος βαθμός τεχνολογικής ανάπτυξης και κυρίως συστηματικής αξιοποίησης νέων τεχνολογιών, από τις αρχές επιβολής του νόμου σε εθνικό επίπεδο. Η περίπτωση της Ελλάδας είναι χαρακτηριστική, καθώς για πολλά χρόνια δεν είχαν υπάρξει επενδύσεις στον τομέα της τεχνολογίας.

Η παράμετρος της χρηματοδότησης και της ανάγκης νέων επενδύσεων, η οποία αναφέρεται στην Στρατηγική είναι επίσης κρίσιμη. Παρά την πρόοδο στην σύνδεση μεταξύ διαφορετικών χρηματοδοτικών εργαλείων, υπάρχει ακόμη αρκετό έδαφος που πρέπει να καλυφτεί ώστε οι τεχνολογικές λύσεις που αναπτύσσονται και δοκιμάζονται στο πλαίσιο ερευνητικών χρηματοδοτούμενων έργων (Horizon Europe) να αποτελέσουν τελικές λύσεις χρηματοδοτούμενες από το εθνικό σκέλος των Ταμείων Εσωτερικής Ασφάλειας και Εξωτερικών Συνόρων. Επίσης, χώρες πρώτης γραμμής με μεγάλες χρηματοδοτικές ανάγκες για την ασφάλεια των συνόρων, όπως η Ελλάδα και η Ιταλία για παράδειγμα, αξιοποιούν το συντριπτικό μέρος της χρηματοδότησης από το Ταμείο Εξωτερικών Συνόρων σε αυτή την κατεύθυνση, με αποτέλεσμα να έχουν μικρές δυνατότητες για επένδυση σε τεχνολογία και καινοτομία αιχμής. Μια λύση θα ήταν η δημιουργία τομεακού προγράμματος για την εσωτερική ασφάλεια στο ΕΣΠΑ, καθώς και η ένταξη έργων σε Περιφερειακά προγράμματα, όπως γίνεται για την πολιτική προστασία και τη διαχείριση των φυσικών καταστροφών. Κρίσιμη παράμετρος, που προκύπτει και από την συμπληρωματικότητα αυτής της Στρατηγικής με τις άλλες δύο για την Ετοιμότητα και την Αμυντική ολοκλήρωση είναι η αξιοποίηση της διπλής χρήσης και η δημιουργία οικονομιών κλίμακας, κυρίως στις νέες τεχνολογίες.

Τέλος, για τον τομέα του κυβερνοχώρου και των νέων τεχνολογιών υπάρχουν δύο μεγάλες προκλήσεις: α) η συνεργασία με τον ιδιωτικό τομέα και β) η ισορροπία της προστασίας προσωπικών δεδομένων με την ενίσχυση της ασφάλειας μέσω της αξιοποίησης εργαλείων τεχνητής νοημοσύνης.

Η λειτουργία της Ένωσης ως παρόχου ασφάλειας είναι κρίσιμη και θα μπορούσε να λειτουργήσει ως ένα νέο πολιτικό αφήγημα που θα ενισχύσει την πίστη των πολιτών στον εγχείρημα της Ευρωπαϊκής ενοποίησης και στη χρησιμότητα της Ε.Ε. στην εποχή των κρίσεων και των απειλών.

A Strategy for Greece's Defence Technological Industrial Base

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May 2025



Greece is entering a new phase in European unification. In addition to monetary union, we now have a defence union.

The Greek Defence Technological Industrial Base (GDTIB) is in a position to rise to this challenge. With the help of realistic public policies, it could be included in the top three DTIBs among the eleven frontline EU states, alongside those of Finland and Poland.

The successful integration of the GDTIB into the pan-European DTIB will strengthen the Greek Armed Forces, make the defence sector one of Greece's economy most capital- and knowledge-intensive ones, and enhance Greece's strategic alliances.

Specifically, the more that the GDIB exports to the pan-European DTIB as it grows by leaps and bounds, the more it will advance the productive and innovation capacities which Greece's military deterrence needs in an era which has witnessed the return of 'Big War'.

Introduction

The acceleration of the EU's emergence as a collective security provider, as well as the rising defence expenditures of all NATO member-countries, presents a unique set of opportunities for Greece's Defence Technological Industrial Base (GDTIB). Namely, the opportunity to enhance the effectiveness of the Greek Armed Forces; to make a meaningful contribution to the transformation of the Greek economic model; and to strengthen the country's strategic alliances.

For these opportunities to be grasped, however, concerted policy action is required from the Greek government in such domains as industrial strategy, military procurement reform, and the strengthening of the country's R&D ecosystem.

This brief note will begin by summarising the main contours of the European Defence Technological Industrial Base (EDTIB), as it is shaped by national and EU policy across Europe and connecting this fast-evolving EDTIB to Greek military, economic and strategic imperatives. Secondly, it will provide a profile of the GDTIB and its actual and latent capabilities. Thirdly, it will situate the GDTIB within its peer group—the DTIBs of the eleven Eastern front-line EU member-states, including Greece—and argue that the GDTIB can and should be one of the three leaders of this group, together with the DTIBs of Finland and Poland. Finally, it will conclude by suggesting the policy set that needs to be adopted to allow the GDTIB to grasp the opportunities that are arising to the benefit of Greece's national interest.

The opportunity: the rise of the EDTIB

The European Commission's White Paper on European Defence^[1] has catalysed the policy debate on the future of the EDTIB both ahead of and subsequent to its publication.

In it, the Commission was able to recommend two important funding instruments. First, the exemption from the excessive deficit procedure allowing member countries that want to increase their defence spending to do so without breaching the EU's fiscal rules. The take-up can rise to a cumulative 650 billion euros, should all 27 member states make use of it. And, second, the 150 billion euro SAFE lending facility, offered at concessionary rates similar to Recovery and Resilience Facility (RRF) loans. Critics have, however, estimated that the two fall short of the amounts that would be required to catalyse defence investment in Europe. It has been calculated that, for France, a 10 billion euro procurement project would, if funded through SAFE, provide an 18 million euro interest rate subsidy per annum^[2]. Turning to those EU member countries who could make use of the escape from excessive deficit procedure option, they would still worry that markets could respond negatively, thereby raising their borrowing costs. More importantly, without joint EU borrowing—and thus funding—for defence, the incentives will simply not be there for EDTIB to achieve the economies of scale and interoperabilities that have eluded it thus far.

That being said, the White Paper is arguably more important as a loud and clear statement of intent for a strategically autonomous Europe, rather than for the specific funding instruments it recommends. In our estimation,

as a means of funding European defence at a satisfactory level, these funding instruments will soon be overshadowed by joint bond issuance by the European Commission, or another agreed vehicle for joint bond issuance such as the European Stability Mechanism. This is because:

- The new German government has decided to remove the debt brake and generously fund its defence effort; it is untenable politically and operationally, for the effort to rebuild collective European defence to be imbalanced due to Germany's much greater fiscal space^[3].
- The US will accelerate its disengagement from Europe's defence, with US troop withdrawals from the Continent very much on the cards, in its effort to counter China's pacing threat^[4], and this accelerated withdrawal will further weaken the influence of those EU countries (such as Holland) that are hostile to joint bond issuance. Importantly, replacing the US's strategic enablers, such as satellite-based ISR and anti-missile defence, is so expensive it will require pan-European industrial collaboration and funding.
- The question mark hanging over the US dollar as a store of value and the world's dominant reserve currency^[5] will make the arguments for creating what the Draghi report called a 'common safe asset'^[6] even more compelling. This asset is jointly raised EU bonds, with a virtuous circle making rising bond issuance cheaper and thus more attractive for EU member countries to borrow collectively to fund the common good of European defence. Relatedly, the European collective defence that this bond issuance will fund will add further credibility to the euro as a reserve currency. Markets will perceive a strengthened European defence as a pillar of EU cohesion, and hence of the credibility of its collective borrowing.

We underline that trends that are already ongoing argue for an adequately funded EDTIB well into the future. Nearly all NATO member countries, under pressure from the Trump Administration, have committed to raising their defence budget at 2 % as a floor not a ceiling. To grasp the order of magnitude, it has been estimated that had all EU member states spent 2 % of their GDP on their defence in 2006-2025, there would have been an additional 1.1 trillion euros in defence spending over the 15-year period^[7]. Relatedly, S&P has calculated that were EU member-states to raise their defence expenditure from 2.67 % of GDP (the current NATO weighted average) to 5 % of GDP (the extreme upper range of the increase President Trump is pressuring European countries to make), that would have resulted in annual defence expenditure increasing from 242 billion USD to 875 billion USD^[8].

In terms of the specific defence domains and imperatives to which this trend in increased funding for the EDTIB is connected, we highlight the following:

1. The need for stocks of war materiel both to be replenished, due to the assistance provided to Ukraine, but also raised to the level whereby Russia can be credibly deterred. To put this in context, according to credible calculations, in purchasing power parity terms Russia's defence spending exceeded the totality of Europe's defence spending in 2024, with an estimated Russian expenditure of 145.9 billion \$ equating to 461.6 \$ billion in PPP terms and exceeding Europe's 457 \$ billion^[9]. The EU therefore needs to translate its decisive collective economic superiority over Russia into a decisive superiority in war materiel by substantially outspending Russia in PPP terms.
2. The need to achieve strategic autonomy from the US, which means that a rising percentage of the procurement meant to establish clear military superiority over Russia will have to be directed at European companies (including non-European companies—be they US, Israeli or Korean—which have taken the trouble to indigenize their operations in Europe). This strategic autonomy encompasses both expensive and cheap innovation, meaning it ranges from R&D in sixth-generation weapon systems such as warships and fighter aircraft to AI-driven drones, as well as strategic enablers historically provided by the US, such as strategic lift, space-based ISR and communications, antimissile defence, and last-generation fighter aircraft, which now need to be developed and manufactured by the EDTIB.
3. The imperative to 'produce and buy European' to achieve economies of scale through industrial consolidation and joint procurement, as well as the interoperability of the EU's Armed Forces. Economies of scale will enable the EU to buy more kit cheaper, while interoperability will make for a more effective collective deterrence^[10]. Indicatively, Europe provided 7 types of Main Battle Tanks (MBTs) and 9 types of self-propelled howitzers to Ukraine, compared to the US's 1 and 2 respectively^[11]. EU funding will serve these goals by subsidizing the intra-European collaborative production and procurement of defence articles, thus incentivizing both the manufacturing and the buying of EDTIB-developed and -manufactured equipment.
4. The need to raise fiscal commitments in defence to benefit European economies, in order to legitimize the

diversion of scarce fiscal resources from social welfare to defence and to maximize direct and indirect wealth generation through an innovative EDTIB. This need also has a strong regional aspect, with national governments keen to ensure that the EDTIB makes a meaningful contribution to the economic wellbeing of their less well-developed regions^[12].

In turn, the growth of the EDTIB and the way public policy structures this growth will afford the GDTIB the opportunity to contribute to vital Greek military, economic and strategic goals^[13]. In particular:

- GDTIB sales volumes can increase manifold, product and services ranges can be expanded, allowing the GDTIB to invest in upgrading its production facilities, achieve economies of scale, and reinvest in R&D—thus enhancing the security of supply to the Greek Armed Forces and contributing to Armed Forces innovation, with the two altogether meaningfully strengthening the Hellenic Armed Forces' deterrence. In other words, a GDTIB that can be an important and effective member of the EDTIB is a GDTIB that can provide both a greater quantity and quality of war material to the Greek Armed Forces. Such a GDTIB accords with Greece's need to deter against a 'Big War', as the disengagement of the US, together with the commensurately increase in Turkish revisionism, means that Greco-Turkish strategic rivalry involves not only two opposing Armed Forces, but also two opposing DTIBs^[14].
- As a constituent member of the EDTIB, a dynamically growing GDTIB will most probably be the Greek economy's most capital- and knowledge-intensive sector, and make a meaningful contribution to the transformation of the Greek economic model and its resulting ability to export high-value-added goods and services.
- Sales to other EU member states of critical war materiel (and its reverse: increasing Hellenic Armed Forces procurement from European firms) as well as participation in European defence supply chains and production consortia, will strengthen and expand Greece's alliances with other EU member-states, thus enhancing EU solidarity with Greece in relation to the threat posed by Turkey. This alliance-building will not necessarily exclude Israel and the US, as their major defence companies will seek EU corporate partners in order to be eligible for EU funding. Importantly, the growing contribution of the Greek DTIB to the collective defence of the EU would also give Greece a correspondingly greater claim to that common European defence.

Considering all the above, we would claim that an effective GDTIB would, as a bona fide member of the EDTIB, be the industrial equivalent of Greece's participation in the EU monetary union, as it would sustain Greece's status as a core, not marginal, member of the EU, this time in the context of the EU's collective defence endeavour.

The GDTIB: positioning and possibilities

We would argue that the GDTIB has been underestimated for three reasons: the corruption scandals that cast a shadow over the GDTIB in the post-Imia weapons procurement spree (1996-2008), mismanagement in major state-owned defence enterprises that created cost overruns and delays in executing contracts for the Hellenic Armed Forces, and the fiscal crisis that led to Ministry of National Defence (MND) orders to Greek defence firms drying up for over a decade^[15].

Notwithstanding these factors, we highlight the following from the pre-fiscal crisis and fiscal crisis periods:

- At a time when other EU member-countries' DTIBs were retrenching due to the post-1989 peace dividend dynamics, the post-Imia defence procurement spree meant that a number of both private and state-owned firms performed a critical subcontracting role in the manufacturing and servicing of highly advanced weapon systems, ranging from US Patriot batteries to German T214 submarines^[16]. The value of the offset agreements involving GDTIB production in this same period, which lasted from the 1990s to the late 2000s, has been estimated at 2.5 billion euros^[17] and involved industrial partnerships with four out of the eight top European defence firms: namely Rheinmetall, Leonardo, Dassault and Airbus.
- During the decade-long Greek defence procurement drought, the private firms survived and even grew on the basis of exports. The poster child of this development was Theon International, which manufactures night vision equipment, is entirely export-oriented, and counts some of the world's most advanced militaries among its clients^[18].
- The lack of national funding also meant that private and state defence firms, as well as university and research institute teams under the aegis of the MND, focused on PESCO and EDF funding. This placed Greece among the top 5 countries in terms of number of participants, right after the leading DTIB

powerhouses of Germany, France, Italy and Spain. As a result, defence-related expertise has been accumulating, and the GDTIB is thoroughly familiar with the technologies and capabilities which the EDTIB has prioritised for future development^[19]. Crucially, these technologies and capabilities address key challenges the EU must resolve to achieve strategic autonomy^[20]—a strategic autonomy which, as we mentioned above, is no longer purely aspirational due to the behaviour of the second Trump Administration.

- The fiscal crisis catalysed an effective restructuring of the critical shipyard sector, with the Skaramanga, Elefsina and Syros shipyards being acquired by well-capitalised outside investors, and partial rationalization efforts being undertaken in state-owned firms in aerospace (EAV) and land weapon systems (EAS).
- Last but not least, a maturing start-up ecosystem (now more than 10 years old) has been created in Greece,^[21] due to recognition that the Greek economy needs to become increasingly innovative if it is not to relapse into systemic crisis. Greek VCs are increasingly focusing on deep tech, and are more able to enter the defence market due to the European Investment Bank (EIB), which is its anchor investor, relaxing its dual use restrictions. The Hellenic Centre of Defence Innovation (HCDI), the less-than-two-years-old MND vehicle for funding defence innovation, which recently put out its first batch of calls, can now take advantage of this long-term effort in deep-tech start-up development.

In the post-fiscal-crisis environment, a geopolitically-assertive Turkey, the return of ‘Big War’ and territorial conquest in continental Europe, and the US’s accelerating focus on Asia, has kept Greece a top spender in terms of weapon-system acquisitions and upgrades^[22]. While the first procurement wave of this period was off-the shelf, mostly from France and secondarily from Israel with little GDTIB input, it has laid the foundations of the Greek government’s current emphasis on 25 % GDTIB participation in all major procurement contracts with non-Greek firms. Importantly, the geopolitical motivation aligned with major procurement choices has catalysed engagement by the French and Israeli DTIBs with the GDTIB. In the former case, Group Naval shared on its own volition some subcontracting work for the Belharra frigates; in the latter, Israel’s IAI acquiring Intracom Defence Electronics, a leading Greek private-sector defence firm. F16 upgrades to the Viper configuration by EAV, and more generally the pick-up of Follow On Support (FOS) in the Hellenic Air Force and Army and Naval Aviation, have also boosted Greece’s aeronautical sector. There has been little activity, however, in FOS work in Greek armour, despite Greece having one of the largest, if not the largest, MBT and self-propelled artillery fleets in Europe.^[23] In addition, as another bequest of the post-Imia procurement spree, there are at least two companies which are now part of the supply chain of the main German manufacturers of armoured vehicles—most prominently METKA, a member of METLEN, one of Greece’s leading industrial conglomerates.

Equally important for the GDTIB, over the last five to seven years, several events and processes have accelerated the development of Greek competencies in the Fourth Industrial Revolution (4DI) domain, either in the private sector or through public and private partnerships outside core defence. We highlight:

1. The gathering pace of state digitization during and subsequent to the pandemic, with RRF funding prioritising digitisation. This has meant that both within the state, and in private sector firms contracted to implement a diverse set of digitisation projects, digital competencies have been deepening in Greece^[24] with the Information and Communication Technology (ICT) sector projected to reach 4.6 % of GDP in 2029, which equals 10.4 billion euros in sales. Public and private partnerships have been proposed and are being implemented to expand the pool of ICT personnel^[25]. This investment has also included AI which, designated a strategic priority due to its undeniable significance, is receiving a mixture of national and European funds channelled to Greek research institutes.
2. The Greek state has also invested considerably in civil defence competencies^[26], including cyber, as well as in border surveillance. In the light of the rising potency of natural disasters, cyber-attacks and population movements, these domains are both inherently synergistic and highly adaptable to the purposes of national defence.
3. The pandemic also catalysed investment by multinational firms, mostly in IT functions serving an international client-base, which has further refined and expanded the Greek IT skill pool.

The importance of such developments for the GDTIB can hardly be exaggerated; indicatively, in the context of Civil Military Fusion (CMF), even companies engaged in IT in Ireland, a country with minuscule Armed Forces, aspire to integrate themselves into the EDTIB^[27].

Becoming a leader among the DTIBs of Eastern frontline EU member-states

Greece is one of the eleven EU member-states which have eastern front-line status; the other ten are Finland, Latvia, Estonia, Lithuania, Poland, Hungary, Slovakia, Romania, Bulgaria and Cyprus. Greece's DTIB strategy should therefore aim to both present itself as, and aspire to becoming, one of this peer group's three leaders, along with Finland and Poland.

On a geographic distance from Moscow basis, Greece it is the only comparable high spender in defence within the EU-27 which is not physically proximate to Russia. In context, in 2024 the only EU member-states apart from Greece to spend above 3 % of GDP on defence were Poland, Estonia and Latvia, with Lithuania hovering under 3 % and Finland just under at a still high by EU standards 2.5 %^[28] (Cyprus' defence spending is just below 2 %; it should be borne in mind that the Greek Armed Forces are also organised to defend the island in an event of military conflict with Turkey). Of course, Greek defence spending is so high for the same reason, though the threat is not Russia, but Turkey and its aggressively revisionist agenda.

Establishing the GDTIB in the top three of this peer group will—given the high legitimacy the group enjoys (not for nothing are the EU Commissioners of External Affairs and Defence from the Baltic countries, while the Report which informed the EU's Preparedness Strategy bears the name of an ex-President of Finland)—allow Greece to promote an agenda that much more effectively within the EU that is facilitative both of its wider national defence effort and of the development of its DTIB.

On the military side, an effective Greek DTIB in the top three of this peer group would translate into being able to provide equipment and solutions to all the front-line states, given the commonality of the threat environment.

On the economic side, Greece can develop a common agenda whereby above-average defence spending in the front-line states does not develop into an inequitable core-periphery relationship with the countries with the stronger DTIBs (such as Germany, France, Italy and Sweden) being the major beneficiaries of the transfer of resources from EU member-states with a weaker industrial base and fewer fiscal resources to develop such an industrial base. Not only would such an arrangement be inequitable, and thus ultimately unsustainable politically, it would also be wasteful of the skills and know-how that front-line states can mobilise in shaping the cause of an innovation-prone EDTIB^[29]. And if Ukraine has proven anything, it is that those nation-states which face the greatest existential threat also have the greatest incentive to innovate defence-wise.

In this context, Greece can partner with Poland and other Central Eastern European (CEE) front-line states to demand a partial recycling of their defence expenditures into their own R&D defence efforts. This would allow their DTIBs to mitigate the core-periphery last-link-in-the-chain conundrum—a policy challenge that has been particularly prominent for CEE countries since their accession to the EU^[30].

On the strategic side, Greece shares a geopolitical hedging strategy with all the other front-line states^[31], whereby they purchase some of their highly advanced weapon systems from non-EU defence firms, primarily from the US and secondarily from such close US allies as the UK, Israel and Korea. We mention, indicatively, the decision taken by Finland and Greece to buy US F35s, Greece's prioritization of Israeli systems for its air defence, and Poland's acquisition of US Abrams and Korean K2 MBTs. Greece therefore has an interest in developing a common agenda which: a) enables, under conditions acceptable to other EU member-states and premised on European indigenisation, the participation of the DTIBs of non-EU member countries in the common EU defence, and b) excludes Turkey from this arrangement, for as long as Ankara avoids joining the EU's democratic and geopolitical canon. Indicative of the possibilities of developing a joint agenda of this sort is the annulment in 2014 of the sale of two Mistral amphibious assault ships to the Russian Federation by President Francois Hollande, following a concerted lobbying effort by the Baltic countries and Poland^[32].

Is such leadership a realistic prospect, however, and are the benefits that would accrue from it feasible? The answer is a decisive yes.

Unlike Greece, all the CEE countries underinvested in defence in the 1990s and 2000s. This meant they could not benefit from the extensive industrial partnerships and knowhow transfer which, as we pointed out above, forms the foundations of Greece's current DTIB^[33]. The fact that defence was not a priority sector, given the peace dividend dynamics, particularly in Germany, meant that far less effort was expended on trying to incorporate the strong

manufacturing sectors of CEE countries into defence-sector supply chains than, say, the civilian automotive sector. Typically, countries like Bulgaria and Romania underinvested in their Eastern Bloc-vintage defence sectors, which mostly exported military equipment of Soviet origin in Africa and Asia. Accelerating efforts to rearm, particularly after the conquest of Crimea by the Russian Federation, could not make up for this lost time, while the most ambitious rearmament effort of all, by Poland, prioritized speed of delivery and/or cementing the security relationship with the US. Poland, which has undertaken the most ambitious rearmament effort of all EU member-states, has also experienced deep-seated politicization and limited R&D expenditure leading to the under-performance of its DTIB, in a situation not unlike that in Greece^[34].

Limited interest in defence, or in the EU as a collective defence provider, as well as the small size of several of the eleven front-line states, also meant a limited uptake of EDF and PESCO facilities. In contrast to Greece, which belongs to the 'vanguard' category in terms of its PESCO/EDF uptake, Poland and Romania are in the 'lukewarm' category, while Finland, Bulgaria, Hungary, Lithuania, Latvia, Slovakia and Cyprus are in the 'loiterer' category^[35]. Furthermore, extensive FDI undertaken by Greek corporations in Bulgaria and Romania post-1989, coupled with a leading Greek presence in the Cypriot economy, means that Greek conglomerates already own subsidiaries in these three peer countries that could be part of a Group approach in terms of defence-related production. No doubt, due to the growth of the EDTIB, there will be additional incentives for M&A acquisitions in defence, with Greek corporates taking the initiative as integrators and mobilisers of needed capital.

Last but not least, Greece is also number two among Eastern front-line states on the European Innovation Scoreboard, after Finland (admittedly, the gap is a large one)^[36]. Among the larger front-line countries that can occupy the top three DTIB positions, Finland is number three among the EU-27 on the European Innovation Scoreboard, while Greece is number 20, Hungary number 21, Poland number 23, Slovakia number 24, Bulgaria number 26 and Romania number 27. This means that the Greek research ecosystem can sustain Greek leadership among the front-line peer group. Even more so if, through its own and the European funding facilities this paper recommends, it manages to entice to defence-relevant domains a critical mass of its US-based scientists, given that this scientific pool is the deepest not only within the front-line peer group but among all EU-27 member countries bar Germany, and only then in absolute not relative-to-general-population terms^[37].

We would be remiss in this analysis if we failed to highlight Finland's leading status among the ten front-line countries, Greece included, in terms of the governance, strategic focus and outcomes of its DTIB^[38]. Finland's DTIB has actually benefited from Finland's strategic isolation, which has translated into efficient use of scarce resources, a focus on an extensive Maintenance Repair and Overhaul (MRO) effort which has resulted in the life cycles of weapon systems procured from abroad being maintained and extended, efficient niche strategies—in, for instance, ship hull design and manufacturing—which have addressed the particular needs of the Finnish Defence Forces, and a distinct lack of corruption and politicization in the DTIB. This set of features constitute a compelling template for Greece and Poland. As they seek to improve the performance of their DTIBs, and considering that the status of the US as the ultimate guarantor of their territorial integrity is now uncertain, it behoves them to see their respective DTIBs as a genuine, not nominal, pillar of their deterrence—just as Finland has done for decades.

Greek leadership of such a peer group would, of course, require recognition by the other nine members that such a group does exist, and that it is useful for each and all of its constituent members for this group to exist. We would argue that Greece's status as the only Mediterranean country, together with Cyprus, to be a front-line state in the EU's east validates both these propositions for three interdependent reasons. First, because it makes the imperatives of territorial defence a cause that is not limited to the centre and north of Europe's eastern border, but also extends to the south. Second, because it makes this cause agnostic to the origin of the threat, thus universalizing it, increasing its normative strength within the EU along, by extension, with the credibility of the EU's collective defence—a feature even more important today when even Denmark's territorial integrity is being questioned from the West (i.e. the US). Third, because it adds numbers to the particular concerns of front-line states—ensuring that defence funding integrates elements that are equitable, for instance, and enable the full participation of all EU member-states in the innovation that European collective defence needs and from which the economies of EU member states can benefit.

Building on the foundations of Greece's extant DTIB

Given its present status, the GDTIB can, with the appropriate level of government support, become one of the three leaders of the eleven front-line EU DTIBs. Achieving this would translate into major benefits for the effectiveness of

the Greek Armed Forces, the competitiveness of its economy, and the strength of its alliances. We believe that the following set of policies can be decisive in achieving this goal.

1. Fully capitalize the state-owned defence enterprises, namely EAV and EAS, and lift all restrictions on their managerial authority by taking them off Central Government supervision, as in their ability to offer competitive salaries. Doing so will a) improve their performance in critical undertakings for the Greek Armed Forces, as in case of EAV's F16 upgrades to the Viper configuration and FOS on the Hellenic Army and Hellenic Navy Aviation branches; b) secure the human and capital equipment resources, in the case of EAS, required to allow the GDTIB to partake in the restocking of critical munitions at the pan-European level; c) allow the GDTIB to participate in newly-founded pan-European consortia for next-generation weapon platforms, as much as in the creation of European strategic enablers that will replace those historically provided by the US.

In a nutshell, the Greek government needs to invest amply in order to ensure: (a) that these two firms' spare capacity is fully utilised in terms of facilities, production lines - including testing sites - and skilled personnel, as spare capacity is in great demand throughout Europe due to the decades-long running down of the EDIIB, from 1989 to 2022; (b) with additional funding and expertise-injection, their embedded knowledge and skills become a stepping stone to participation in pan-European consortia, not only as subcontractors but also as innovative developers able to capture part of the value added to be created. After an accelerated restructuring effort of this sort, both EAV and EAS will also become attractive acquisition targets to both Greek and non-Greek investors, thus leveraging the government effort via additional inflows of capital and expertise. The private-sector firms, by aggressively expanding the manufacturing capability of their defence subsidiaries through ambitious investment plans (as in the case of METLEN most prominently^[39]) are proof positive of what these two state-controlled enterprises can aspire and plan to achieve within the EDTIB, if liberated from their present constraints.

2. If Thessaloniki-based ELVO has retained important production capabilities and licenses—meaning spare capacity that can be resuscitated—ensure that ELVO acquires a credible industrial owner so that it play a role similar to that of EAV and EAS in its domain of expertise, which is military vehicles assembly and their FOS. As per the White Paper recommendations, investors in ELVO and other defence firms in Greece's regions could make use of EU Cohesion funding, but only if Greek central and regional authorities act fast and make full use of the scheduled revision of this funding source.
3. Double the budget of HCDI, so it can issue more calls and finalise more contracts in order both to accelerate the introduction of innovative technologies in the Hellenic Armed Forces and to give Greek defence high-tech firms a fighting chance to export their goods and services in the pan-European market with the added credibility of already having the Greek Armed Forces as a client. Employ this additional HCDI allocation to defence tech and dual use firms which can submit proposals, on their own or in partnership with research teams from universities and research institutes, to HCDI beyond the remit of the calls issued by the latter. By doing so, HCDI can catalyse the growth of the GDTIB as a growing number of companies and research teams will be able to consider potential defence applications of their technologies and knowledge. We mention here that dual use investments are included in the White Paper and accepted as bona fide investments in defence by the GFOG classification system. Relatedly, Turkey is dedicating a bit more than 10 % of its public R&D budget to defence compared with a little less than 5 % in Greece^[40].

We also note that enhancing the ability of Greek defence tech and dual use firms to produce asymmetric advantages for the Greek Armed Forces, and enhance Greek deterrence, is synergistic with the defence effort of the other ten frontline EU member-countries; they face similar operational challenges, ranging from Finland's archipelagic defence in the Baltic Sea to enhanced border surveillance in Poland.

Enhancing the funding of defence startups can have another advantage: drawing to Greece startups with diaspora founders who, apart from gaining access to cost-competitive skilled staff in Greece, may also gain a 'passport' into a growing European defence market. Also reserve fiscal space for these deep-tech, Greek-only procurements so that successful prototyping can be converted into production and deployment by the Hellenic Armed Forces without delay.

4. Expand the FOS budget to all functional and upgradable platforms on a value-for-money basis, so that the Hellenic Armed Forces rapidly restore their strength and the GDTIB both gains valuable expertise and is further integrated into pan-European value chains. This imperative is particularly pertinent with regard to land systems,

as in the case of MBTs and self-propelled artillery.

5. Strengthen the scientific capacity of the General Secretariat for Defence Investments and Acquisitions by hiring high-quality permanent civilian staff. On the basis of lessons learned from Ukraine about procurement in wartime, revamp the MND's procurement processes. Also judiciously adopt Israeli practices aimed at enabling civilian firms to design and implement defence solutions, so that CMF can be better implemented in the defence domain in Greece. With additional technical expertise and facilitative processes, the MND would be able to catalyse defence innovation undertaken by the GDTIB, and especially innovation originating from Greece's dynamically growing ICT sectors, as highlighted above^[41].
6. In view of the tumult in the US research ecosystem, create a fund designated to attract top Greek diaspora scientists specialising in defence-relevant domains ranging from aerospace to automotive technology to AI, so as to deepen the scientific capital from which the GDTIB can draw ideas, and to enable its integration into the most cutting edge EDTIB projects. We reiterate that Greece has, relative to its population, by far the most numerous and distinguished scientific diaspora (i.e. Greek nationals who received their undergraduate education in Greece) in the US among the EU-27.
7. Be ready to offer matching funds, as per the recommendation of the PWC study on Greek manufacturing, in order to allow the major firms in the GDTIB to participate in the more ambitious EDTIB consortia. There should be a particular focus here on sea warfare, manned and autonomous, given Greek shipyards' ability to exploit synergies with their civilian work, which itself benefits significantly from its access to the globally dominant Greek merchant marine. Put in place the foundations for this process now by reviewing and selecting for future support the most promising domains among the EDF and PESCO projects in which Greek defence firms and research teams have participated. Such matching funds should be from national and not EU sources so as to ensure timely decision making in accordance with a national prioritisation strategy.
8. In coordination with the ten other frontline EU member-states, which spend far more than all other EU member-states on defence, undertake the initiative to receive disproportionate R&D funding for defence from collective EU funding sources on the basis of the national weighted average spending on defence as a percentage of GDP over the last five years. Such an initiative needs to be contextualized by the fact that, in the growing European defence market, frontline states would tend to channel a growing percentage of their comparatively larger defence budgets to non-frontline states such as France, Germany, Italy and Spain (and the UK which, while a non-EU member, is asked to financially contribute to common European defence) which have the most highly advanced DTIBs. Include in this support scheme the proposed institution of the EU professor: leading scholars from member-states, either resident or repatriated, who will have their salaries paid directly by the EU, so they may be compensated above the low civil service salaries in their homelands, which would render their repatriation unfeasible.
We underline that, barring such remedies, the growth of the EDTIB will further entrench intra-EU disparities as stronger national DTIBs, and better-funded national research ecosystems, would be able to attract the lion's share of the collective resources the EU allocates for defence.
9. Aggressively pursue military mobility funding opportunities from the EU, so as to further increase Greece's significance for the EU's common defence, and cement relations with the other frontline member-states while improving the transportation infrastructure in Northern Greece.
10. Utilise the recently established General Secretariat of National Defence to coordinate the ministries of National Defence, Finance, Development, Citizen Protection, Education, Merchant Marine, and Digital Governance in pursuit of the policy aims listed above, as well as others aimed at facilitating the growth of the GDTIB.

Concluding Remarks

Considering both existing and highly probable trends in the funding of the EDTIB, as well as the foundations of the extant GDTIB and Greek dual use competencies, it is well within Greece's grasp to build one of the top three DTIBs among the EU's eleven front-line states in the years to come.

Doing so will prove decisive in upgrading the deterrence of the Greek Armed Forces in an era of 'Big War', creating the most knowledge- and capital-intensive sector in the Greek economy, and putting Greece at the core of the EU's collective defence effort.

This task is well within Greece's fiscal and reform capacity.

Judicious recapitalisations and reforms in the major state-owned defence firms will position them so they can contribute to the restocking of Europe's war materiel and participate in the next-generation weapon-systems development and manufacturing undertaken by pan-European consortia.

An increase in funding to defence deep tech linked to reforms in weapons procurement can also rapidly boost the Greek Armed Forces' asymmetric advantages and create export opportunities to the EDTIB.

Larger private-sector core defence and dual use firms can also grow further and deepen their links with the EDTIB on the back of FOS provided to the Greek Armed Forces, as well as their ability to act as subcontractors to Greece's major foreign suppliers of highly-advanced weapon systems. With matching funds by the Greek state, they will be able to build on their FOS and subcontractor skills to add value, on their own or as members of consortia, through de novo weapon systems developed via common EU funding.

Finally, all three cohorts of the GDTIB stand ready to make use of investments by the Greek state and the EU in Greece's research ecosystem, as in the case of subsidising dual use consortia including both firms and research teams, repatriating distinguished defence-relevant scientists from the Greek diaspora, and funding basic and applied research applicable to defence purposes.

Almost a quarter of a century ago, and following years of systematic policy effort, Greece reaffirmed its status as a core member of the EU by adopting the euro as its currency. It is now well within the nation's capabilities, as well as vital to its national interest, to maintain this status by developing an effective DTIB which is instrumental to both national and European defence.

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ELIAMEP Explainer – India – Pakistan: five factors determining the evolution of the conflict

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At a time of great instability and insecurity due primarily to the wars in Ukraine and the Middle East, the tension between India and Pakistan ratchets up the insecurity still further, along with fears of further destabilization and military conflict. The clash was sparked by a terrorist attack, but has a decades-old dispute over Kashmir at its heart, along with issues of water management on the Indus river. We also have to factor the nuclear dimension into the equation, given that both countries have nuclear arsenals. That the countries now find themselves on the brink of a hot confrontation is a source of enormous disquiet: no one wants to see two countries with powerful armed forces and nuclear arsenals go to war. And since the US no longer seems to want to play the role of intermediary of last resort, the neutral third party that could restrain the two nations in order to avoid a clash becomes a wide-scale war is now conspicuous by its absence.

The Kashmir Dispute

The dispute over control of Kashmir, a region in the foothills of the Himalayas, dates back to when India and Pakistan gained independence from Britain in 1947. Affirming a Westphalian approach to population management (*ejus regio, ejus religio*), the predominantly Muslim population of Kashmir found itself part of India (and therefore a minority within that state), as a result of the choice taken by the region's traditionally Hindu rulers. Both countries claimed full control of the region from the outset, but each actually controls only part of it, with the borders dividing the two zones—the result of a military conflict in 1947-1948—being among the most heavily militarized in the world. The last time India and Pakistan were involved in a war for control of Kashmir was in 1999. Various armed insurgent groups in the Kashmir region are currently carrying out attacks against India and demanding either Pakistani control of the region or its independence. The situation in the region entered a new phase in 2019, following the Modi government's decision to revoke the special limited autonomy granted in 1949 to that part of the region which is controlled by India. An open conflict, it has led on occasions to tensions and violence, but also to open war between the two countries.

The terrorism factor

Pakistan is a country with strong links to Islamist terrorism—to Al Qaeda, for instance, but also with the Taliban. Over and above this general condition, however, one of the most dangerous Islamist terrorist organisations active today, the Lashkar-e-Taiba (LeT), which has declared India its primary enemy, is close to Pakistan—and, India would argue—directly linked to it. Established in 1990 in Afghanistan's Kunar province, Lashkar-e-Taiba (also known as Jamaat-ud-Dawa) is based in Muridke, near Lahore in Pakistan. The organisation's stated aim is to impose Islamic rule on India and to unify India's Muslim-majority areas with Pakistan. In November 2008, the LeT carried out a series of bloody attacks in Mumbai, which have been described as India's 9/11. The terrorists approached the city from the sea, then murdered 166 people, injured over 300, and took hostages, resulting in a four-day exchange of fire as the Indian security forces sought to free the hostages. The terrorist attack launched on 22 April 2025 in the Indian-controlled part of Kashmir claimed the lives of 26 people. Although the LeT did not claim responsibility for the attack, India linked it to the group and to Pakistan before retaliating. For its part, Pakistan continues to categorically deny India's accusations as the artillery duel on the border continues to claim an ever-growing number of casualties.

The broader geopolitical context

The India-Pakistan confrontation also forms part of the broader geopolitical and strategic confrontation between the West and China. India has traditionally relied on Russia, while Pakistan could always count on American support. India is already moving towards the West, however, significantly strengthening its ties with the US and the European Union. On the other hand, Pakistan seems to be moving towards China and is increasing its purchases of Chinese military equipment (according to the *Economist*, Chinese equipment now accounts for 81% of its imports of military material, up from 38% 15 years ago). Clearly, India, as one of the world's major emerging powers, has a crucial role to play in the ongoing competition between the US and China for influence across the geographic expanse from the Pacific to the Middle East and Africa; however, with its shrinking international footprint, Pakistan does not. A member of the G20 while claiming a hegemonic role in the Global South, participating in defence agreements with the major Pacific powers (Quad: Australia, India, Japan, US) while expanding its trade relations with Europe, both via the India-Middle East-Europe Economic Corridor (IMEC) and the negotiating of a General Trade Agreement with the European Union, and exchanging technology with the US, India is becoming a privileged partner for both the US and Europe and an influential actor within the international order.

Nuclear weapons

Both India and Pakistan are nuclear powers. Neither country has ever deployed nuclear weapons in a conflict, but many experts fear that the ongoing crisis could escalate beyond the use of conventional weapons. According to the Centre for Arms Control and Non-Proliferation, India has some 164 nuclear warheads and land-, sea- and air-launch capabilities. Although India has had an explicit "no first strike" policy in place since August 2019, it has said that this is currently under review. Pakistan has around 170 warheads. However, if the current trend continues, Pakistan's arsenal could grow to between 220 and 250 warheads in the years ahead. Pakistan stores its nuclear warheads apart from its missiles and says it will assemble just one, if nuclear weapons are to be deployed. Unlike India, Pakistan does not have a declared "no first strike" policy and has chosen instead to emphasise "tactical" nuclear weapons as a counterweight to India's larger and qualitatively superior conventional forces.

Water management on the Indus river

Water disputes between India and Pakistan have been gradually worsening in recent years. The Indus Water Treaty of 1960 has weathered diplomatic storms for nearly sixty years. However, recent water infrastructure projects, including the now-completed Kishanganga dam in Kashmir and the new Rattle hydropower plant on the Chenab river, have reignited tensions and led to economic and legal disputes. In 2023, India formally requested a review of the Treaty; when Pakistan refused, it boycotted the Indus Permanent Commission, whose proceedings have been frozen since 2024. It is clear that the territorial conflict over Kashmir is absolutely linked to the water situation and poses a threat to the treaty. In addition, the growing impacts of climate change on Himalayan glaciers could increase the likelihood of disasters and threaten the long-term water security of local communities. All these factors will have an impact on future transnational cooperation and regional developments.

Having your cake and eating it too? Can and should Turkey's defence industrial technological base benefit from the European Union's Rearmament?

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Summary

- Since landing ships, made in Turkish shipyards in order to enable the invasion of Cyprus, reached their designated beachheads on the 20th of July of 1974, the Turkish defence technological industrial base (TDTIB) has been locked in a see saw pattern.
- From the late 1960's to today the TDTIB has advanced in order to enable Turkey to exercise strategic autonomy. The very exercise of this strategic autonomy has recurrently caused ruptures with Turkey's western allies. These ruptures have, in turn, disrupted the industrial partnerships on which the TDTIB depends.
- This pattern is experiencing a historic high currently with the TDTIB's product range, which includes sophisticated UAVs and naval ships being employed by Turkey in support of an aggressive challenge of European interests, and most prominently in a comprehensive challenge of Greek rights, solidly established under UNCLOS, to an exclusive economic zone and to the laying of a subsea electricity cable linking Greece with Cyprus.
- At the same time, due to the European Union's (EU) rearmament effort, and the possibility of third countries participating in it, already provided for in the SAFE funding facility, the TDTIB has the opportunity to further grow in volume and sophistication.
- This policy paper will argue that this opportunity should be denied to the TDTIB both on the basis of past behavior of Turkey but also on solid evidence of the current and future priorities of the Erdogan regime.
- As in the past nearly sixty years, it is clear that the current Turkish leadership prioritises the exercise of its strategic autonomy, facilitated by the TDTIB, and not the TDTIB's participation in the EU's rearmament. Such a prioritization makes structurally unstable the relationship, and in particular highly prone to disruption, between the TDTIB and the EU's rearmament effort.
- Additionally, the participation of the TDTIB in the EU's rearmament effort by boosting the capacity of Turkey to challenge Greece's and Cyprus' sovereign rights, corrodes the principles of collective security, and thus undermines the ability of the EU to mobilise the collective resources necessary for its own strategic autonomy.
- Thus the TDTIB neither can nor should participate in the EU's rearmament effort.

Introduction

This policy paper will posit that the Turkish defence technological industrial base (TDTIB) neither can nor should benefit from the EU's collective rearmament effort and for the same set of reasons. Turkey's internal repression and external aggression make participation of the TDTIB in the EU's rearmament both highly vulnerable to disruption and corrosive to the intra-EU consensus that collective rearmament requires for its realization.

The first section will chart the evolution of the TDTIB, from the effort to prepare for military intervention in Cyprus, culminating in the invasion of the island in 1974, to today's integration of Turkish-made UAVs either in the cross border operations of the Turkish Armed Forces or in the military operations of Turkey's proxies and allies. The pattern will emerge of a see saw movement whereby strategic autonomy enabled by the TDTIB creates bilateral or multilateral ruptures which in turn derail the TDTIB's partnerships with key western partners.

The second section will argue that the interaction of the TDTIB with Turkey's striving for a strategic autonomy that is mostly antithetical to the EU's Common Security and Defence Policy (CSDP), as well as increasing domestic repression, will continue to be a mainstay of the Erdogan regime. Consequently, even if the TDTIB is allowed to benefit from the EU's collective defence funding, the participation of the TDTIB in the EU's rearmament effort is bound to be a structurally unstable, and thus an inherently unreliable proposition.

The third section will explore the way in which the EU's collective rearmament effort is both constitutive and reliant upon the construction of a new EU polity, as it involves greater collective mobilisation of resources in the service of the defence needs of all EU members. These defence needs are already more diverse than the Russo-Ukrainian war suggests and bound to get more so in the future, due to the size and diversity of the Union. By extension, this polity, the 'geopolitical Europe' as it has been called, cannot privilege one threat over another, nor one or more member-states' threat perception over the threat perceptions of other member-states, if it is to achieve the cohesion and mobilisational capacity that are indispensable to its viability. Yet the participation of the TDTIB in the EU's rearmament, by undermining the Greek and Cypriot deterrence over Turkish aggression, discriminates in terms of which threat is considered to be important, and for which member-states, at the EU-collective level and which is less so.

The fourth section will review arguments made in favour of the participation of the TDTIB in Europe's rearmament, and policies recommended to that effect, and evaluate whether they can indeed supersede the considerable disadvantages of such participation identified by the author.

The concluding section will, on the basis of the above, argue that the TDTIB should be excluded from participating in the EU's collective rearmament effort.

The evolution of the relationship between the TDTIB and Turkey's strategic autonomy

On the 20th of July 1974 Turkish landing ships reached the designated beachheads in Cyprus out of which poured Turkish infantry, tanks and armoured personnel carriers. As the authors of the definitive study of the Turkish invasion to Cyprus point out this was the commencement of "the only successfully completed amphibious and airborne landing against a determined defender since 1945"[\[1\]](#). The invasion of Cyprus was also one of the largest, in terms of the proportion of territory lost by a sovereign state via military means, partial conquests in the post WW II era, partial as opposed to total conquests being the dominant form of territorial conquest in this period[\[2\]](#). It is worthwhile mentioning that as a result of this military operation 36% of the territory of the Republic of Cyprus is still occupied by Turkey whereas Russia, today and after more than three years of war, occupies approximately 20 % of Ukrainian territory.

Preparation for the invasion also included the founding act of the creation of the TDTIB, in the post WW II era, in the service of Turkey's strategic autonomy. Although discussions among Turkish civilian and military policy makers on a possible invasion of Cyprus started as early as 1955 it was after the Cyprus crisis of 1964 and the humiliating Johnson letter, in which the US President explicitly forbade Turkey from employing US equipment to invade Cyprus, that Turkey set itself on a path to acquire its own technical means necessary for such a successful invasion. Specifically, a US embargo on the sale of landing ships, tank (LSTs), led Turkey to convert ships to this configuration, acquired by other countries, and more importantly for Turkish shipyards to acquire the capability to construct 600-ton LSTs in the 1970S, twelve of which had joined the Turkish navy by 1974[\[3\]](#).

Importantly, the invasion of Cyprus set in motion a see saw pattern which has exercised, still today, a bit more than half a century, determinative influence over the interaction between the TDTIB and Turkey's strategic autonomy. In essence, the TDTIB by enabling Turkey's strategic autonomy would contribute to the implementation of weapons embargoes by Turkey's main Western weapon systems suppliers, subsequent to the exercise of such an autonomy. In return these embargoes would both disrupt the evolution of the TDTIB while also pushing Turkish policy makers to double down in developing the TDTIB, with Turkey's own resources, albeit subject to the structural and fiscal constraints of the country[\[4\]](#).

The invasion of Cyprus catalysed the mobilization of the politically influential Greek-American community which, in the aftermath of Watergate, managed to convince the US Congress to impose a weapons embargo to Turkey on all US weapons sales, which lasted for three years. This 'rule of law' lobby successfully argued that the invasion of Cyprus was not simply a Greek and Greek-Cypriot matter but constituted a gross violation of the universal norm of sovereignty, and as such warranted Congressional restrictions placed on the US Administration, regarding the management of the US-Turkey relationship[\[5\]](#). Analysts of the TDTIB are in agreement, that the US embargo catalyzed the determination of Turkey's policy makers to invest in a long term effort to develop comprehensively their defence industrial capacity such that a future embargo would not threaten to cripple the Turkish Armed Forces, considering for example that Turkey's Air Force in 1974 was completely depended on US spare parts[\[6\]](#).

A brief review[\[7\]](#) of the key incidents that negatively affected Turkey's access to Western weapon systems, including the provision of such access via bilateral or multilateral DTIB partnerships, demonstrate continuity with the pivotal Cyprus invasion and its aftermath.

The repression of the Kurds in the 1990's, at a time when Turkey was under military tutelage, resulted in suspension of weapon sales from Western European suppliers, particularly land systems. The 1996 Imia crisis with Greece had a similar effect. Both the repression of the Kurds, which entailed massive violations of human rights, and the Imia incident which was accompanied and justified by a baseless challenge of Greek sovereignty of the Imia as well as other Aegean islets constituted norm breaking behavior to Western perceptions[\[8\]](#).

The Mavi Marmara crisis in 2010 which led to a complete breakdown of the defence relationship between Israel and Turkey, including the cessation of a productive for the TDTIB relationship with leading Israeli defence firms, also constituted an exception, in terms of a European and North American canon. This canon mandates that Europeans at the country and EU level, due to the status of the Holocaust as a genocide implemented in European soil, by Nazi Germany and the active collaboration of important societal forces in Nazi-occupied countries, from Lithuania to Greece, will make allowances to the Jewish state (with suspension of weapons sales imposed on Israel in the 1960's by France and the UK driven solely by commercial and geopolitical considerations and in particular the need to sustain relationships with the Arab world). Turkey, as a predominantly Muslim country which did not fall under Nazi occupation and was not a combatant in WW II, is clearly outside this canon. The point here is not whether the EU and its constituent member-countries are in the right in not taking a more robust attitude towards the death and destruction visited upon Gaza at the time of writing by Israel's armed forces - but rather to underline that EU member states, their diversity notwithstanding, share in a historical past and normative preferences to a greater degree among themselves than they do with Turkey.

The acquisition of the Russian S400 ground to air system, and the resulting expulsion of the TDTIB from the dominant, globally, 5th generation aircraft's supply chain also reflects Turkish exceptionalism. In effect, Turkey struck such a close defence relationship with a country, Russia, presenting a clear threat to European security already two years prior, as the conquest of Crimea which reanimated fears of Russian intent in the Western camp had already taken place in 2014. Indicatively, France had to revisit its 2011 decision, under the Sarkozy Presidency, to sell two Mistral helicopter carriers to Russia, cancelling the sale by 2014, under the Hollande Presidency. The decision to sell the Mistrals to Russia was misaligned, to say the least, with the strategic interests of the western alliance France was a member of, which furthermore threatened its overall defence relationship with front line states of the EU and NATO[9]. To the extent that the S400 decision was motivated by Erdogan's suspicion that the US instigated the 2016 coup attempt against him and he had to, in effect, acquire a ground to air defence system that could guard him against his own US-equipped and trained Air Force[10], this procurement decision also points to an exceptional distrust of the US by a fellow NATO-member country, exceptional even by the standards set by the second Trump Presidency.

In 2018 Turkey's deliberated-upon partnership with Italy and France for the co-production of SMT missiles was suspended due to Turkey's divergent interests in Syria and the Mediterranean[11]. Turkey's aggressive challenging in the field of Greek and Greek-Cypriot sovereign rights led to Turkey's exclusion from the PESCO and EDF R&D defence funds in the early 2020's to today. Turkey's military operations in Syria, against Kurdish forces, its human rights record, and other such issues, also generated opposition to weapon sales in Holland which has a strong lobby arguing for a normative-informed weapons export policy[12]. Last but not least, the sale of Eurofighter aircraft to Turkey was suspended, in early 2025, due to the opposition of the previous German government, engendered by the imprisonment of Istanbul Mayor Ekrem Imamoglu and Erdogan's most formidable challenger for the office of the Presidency. This decision was reversed by the succeeding CDU-led government while there is ongoing speculation on whether Greece will manage to impose commitments by the government of Turkey that the Typhoons will not be used against her.

Importantly, Turkey's policy in Libya which has alienated France was also induced by the former's need to challenge Greek sovereign rights in the Mediterranean, by advancing through an agreement with Libya, the notion that Greece's islands, even such large ones as Crete do not produce sovereign rights in terms of the delineation of exclusive economic zones, a notion widely accepted as contravening the international law of the seas[13]. We also mention that Greece exerted pressure, albeit unsuccessfully, to freeze the partnership between Spain and Germany and Turkey, involving respectively, the manufacturing under license of an aircraft carrier and advanced T214 submarines.

Overshadowing Turkey's relationships with Western counterparts, is the contributing role itself of TDTIB in Turkey's geopolitical exceptionalism. Turkish-made UAVs, and more largely their integration in combined arms operations initially in Southern Turkey and subsequently in Syria, Libya and Nagorno Karabach, have been a contributing factor in counter mobilization against Turkey by influential ethnic communities in Germany (Turkish Kurds) and the US (Greek-Americans, Armenian-Americans, Jewish-Americans). In an action-reaction dynamic techno-nationalism, namely the vested interest of the Erdogan regime to demonstrate to domestic audiences the superiority of Turkish arms, the martial virtues of the Turkish soldier being leveraged by the indigenous technical

means at his disposal, has been adding fuel to the fire^[14]. Additionally, the ambitious naval shipbuilding programme of the Turkish Navy has fueled Turkish aggression in the Mediterranean, encapsulated in the Mavi Vatan doctrine, with parochial but influential economic and Service (Turkish Navy) interests being vested in Turkey's geopolitical aggrandizement. This package gets wrapped up in Turkey's emergence as a classic middle power, its geopolitical ambitions informed by reimaginings of its imperial past and propelled forward by the US's profound ambivalence of its role as a global policeman^[15]. To top it all, the return of 'Big War, as evidenced in Ukraine, has reinforced the link between a country's ability to achieve escalation dominance and the size and capability of its DTIB, with even war gaming now including defence industrial capacity in the context of a sustained war effort^[16]. As such the TDTIB, depending on its evolution, can very well contribute to the 'war optimism' of Turkey's leadership under an ever expanding range of military conflict scenarios.

All in all, what is observed in Turkey is a recurrent pattern over a period of approximately sixty years of divergent geopolitical interests, informed by geography, history and identity, as well as of impossible to dislodge for long domestic authoritarianism, derailing bilateral or multilateral defence relationships. Domestic and international Western norm breaking, or even lack of sharing of historically-informed western preferences, as in the case of Israel, are also an important factor. Geopolitical divergence and norm breaking also create fertile ground for the seeding and growth of coalitions in Europe and North America which prioritise the breaking up of such bilateral and multilateral defence relationships between Turkey and the West. Such a counter-reaction is assisted by the fact that Erdogan has now been entrenched in a gallery of rogues, right next to Putin, of leaders willing to employ force to impose their will both to their own citizens and to neighbouring states^[17].

Furthermore, the more capable the TDTIB has become and the greater a share of a sophisticated supply chain of a weapon system it can claim, the more disruptive the subsequent rupture becomes for its western partner(s). This highly volatile relationship of weapons manufacturing and sales by the West to Turkey, of sixty years standing, started with the denial and then suspension of sales of weapon systems for which the nascent TDTIB would provide limited maintenance, repair and overhaul (MRO) support services, such as the technologically simple, WW II-vintage LSTs, and culminated in the need by Lockheed Martin, the US manufacturer of F35s, the world's leading fifth-generation fighter jet, to replace in short order a total of 12 billion USD's worth of supply chain production by those Turkish firms which were expelled from the F35 manufacturing programme, after Erdogan's decision to procure the S400s^[18]. Indeed, if the F35 imbroglio demonstrates anything is that the participation of the TDTIB to valuable for the Turkish economy supply chains, as much as to the its Western partners, will and can be sacrificed if domestic imperatives and or strategic autonomy rationales mandate so.

Can the Erdogan regime strike a viable partnership between the TDTIB and the EDTIB?

There is no doubt that the TDTIB stands to gain a lot in turns of both volume of sales and innovation capabilities were it to be incorporated in the European Defence Technological Industrial Base (EDTIB), in terms similar to those accessible to the UK and Norway. As with the case of South Korea, industrialised nations which doubled down in the development of their DTIBs due to geopolitical circumstances different from those enjoyed by most EU-members, are now in a position to meet rapidly increasing demand for everything military^[19]. More largely, Turkey's robust manufacturing base together with the geographic proximity to the EU, make the country one of the potential greatest beneficiaries of the EU's need to build up resilient supply chains via near-shoring partnerships. Naturally such a geopolitically driven partnership between the EU and Turkey can also be translated in political leverage in terms of the enhanced ability of Turkish policy makers to make what EU interlocutors, including Greek ones, would consider as legitimate Turkish interests and policy priorities appreciated and respected both in Brussels and the chancelleries of Europe.

Equally, such an alignment of industrial and geopolitical interests is simply not realistic if Turkey, under Erdogan and his potential regime successors, stays on the same course, of a) geopolitical heterodoxy, a heterodoxy which includes the attempt to challenge the sovereignty of EU member-countries, namely Greece and Cyprus, as well as b) to effectively suspend democracy in Turkey, and go, as international commentators have noted, for 'full autocracy'^[20]. As with the previous instances of the disruption in TDTIB bilateral and multilateral partnerships which we briefly reviewed above, sooner or later this domestic and foreign policy mix, catalyzed by any one or more future incidents that it is bound to generate, will derail Turkey's DTIB relationship with the EU. Simply put, this Turkish comportment will, as it has so often done in the past, create the coalitions between pressure groups

and states, the mutually reinforcing loop between norms and interests that will compel the EU to show the door to TDTIB, notwithstanding any defence industrial partnerships that may have been struck in the meantime. Indeed, several EU reports recurrently produced long lists of policy items where there is massive divergence between Turkey and the EU, a veritable minefield of unbridgeable gaps in interests and norms that can explode at any moment^[21].

In the estimation of this policy paper, in the timeframe of any possible decision by the EU and its member-states, say the next 2-3 years, the second possibility of continuous divergence from CFSP is the most realistic one and not the first.

The fact that Erdogan is determined to hold on to power, despite the near certainty that any under conceivable scenario of free and competitive elections he will lose by any one of his most formidable opponents, among CHP's leadership roster, mandates repression at home and aggression abroad. The economic benefits of a geopolitically-based industrial partnership between the EU and Turkey are not enough, and cannot come fast enough, to make him prevail over any of his more charismatic opponents in the 2027 Presidential elections. So he has to throw his opponents into prison, causing further trouble to the Turkish economy which has already eroded his popularity irrevocably. Indeed, the more times passes, the more inexorable the process of eliminating the regime's main political foe, CHP, as a viable political competitor becomes, with accretive imprisonments and suspensions from public life, directed against an ever widening circle of key CHP personalities^[22].

Increased domestic repression, in turn, is legitimized by aggressive assertion abroad. The militarization of Turkish foreign policy as a pillar of Erdogan's effort to checkmate his domestic opponents has been well-documented, particularly through Turkish military operations in Syria^[23]. Turkey's currently ongoing challenge in the field, of Greece's effort to lay an electric energy interconnecting cable between Crete and Cyprus, the Great Sea Interconnector (GSI), a project of Common European Interest, partly funded by the EU, and executed by a leading French manufacturer with an expertise in subsea electricity cable laying, has reanimated Greece's objections to the TDTIB benefiting from the EU rearmament. These objections were most prominently demonstrated in Greek efforts to eliminate the possibility that Turkish defence firms will benefit, as subcontractors, from EU defence procurement orders funded by the concessionary rates of the 150-billion euro SAFE programme^[24].

The bigger picture is one of a Turkish leader who, from the 2010's onwards, has grounded his hegemonic enterprise on extracting geopolitical rents and prestige from unilateral force projection as opposed through economic and geopolitical integration with the EU.

This strategic choice of Erdogan has nullified politically most if not all of the advantages that accrued to the New Democracy (ND) Greek Government by the 'calm waters' Greco-Turkish agreement of 2023, namely the containment of illegal migration flows from the Turkish coast to the east Aegean islands, the visa facilitation of tourist flows from the Turkish coast to the East Aegean islands (essentially the agreement exchanged politically destabilizing migratory flows to Greece with politically beneficial tourist flows), the cessation of violations of the Greek air space by the Turkish Air Force and the containment of the geopolitical risk, as a factor which could derail Greece's still painfully gradual recovery from the ten year fiscal crisis and in particular threaten the lucrative for the Greek economy tourist season.

It is illuminating that at the present juncture, when Turkey has every interest to 'play nice' with Greece on the basis of this 'calms water' agreement, in view of the potential benefits that may accrue to her from a partnership with the EU, it is challenging as we mentioned above in the field the right of Greece, according to the international law of the seas, to explore the seabed and proceed to lay the GSI cable between Crete and Cyprus. Turkish activism in Libya and Syria also aim at maintaining the idiosyncratic challenge, according to the international law of the seas, to Greece's right for an exclusive economic zone, based on the position and size of its island territories, most prominently, but not exclusively, the largest such island territory, Crete.

This course of action pursued by Erdogan has created a dynamic in Greece in favour of a creation of yet another nationalistic party, threatening to eat into ND support, enabled the major opposition party, PASOK, to put the government on the spot on the issue of if and when the GSI will actually be implemented and has engendered critique, both within and outside ND, that primarily SAFE betrays the promise of collective European defence, by potentially benefiting the TDTIB.

Considering the above, and the fact that elections are to be held in Greece in 2027 at the latest, we may as well take for granted that Greece and Cyprus will energetically lobby against any type of participation by the TDTIB in the rearmament of Europe. While disagreements between Greece and the Republic of Cyprus on the financial viability of GSI have cast a shadow over the project's viability, Greek policy makers have also provided assurances that Greece is determined to proceed with the laying of the cable, even if that means a testing of wills, militarily, in the field.

Indeed the fact that the Erdogan is being so reckless in pressing his claims against Greece, through diplomacy and force deployment, itself underlines the fragility of any future partnership between the EU's rearmament effort and the TDTIB - it is proof positive that for the Erdogan regime such a partnership is a 'nice to have' whereas aggression against two EU member countries, Greece and Cyprus, are politically speaking 'must haves'. As it is, it is only because the Greek government has refrained, thus far, from forcing this issue via military means, in the field, as she is perfectly entitled and capable of doing so, that its fellow EU member-countries have not been compelled to admit the incongruity of Turkey's participation in the EU's rearmament effort.

Should the Erdogan regime be given the opportunity to strike a partnership between the TDTIB and Europe's rearmament?

National commitments reached in NATO's Hague summit, of a rise to 3.5 % of GDP to defence spending, and an additional 1.5 % of GDP spending to domains supporting NATO's collective defence, should not be discounted as implausible. They reflect, on the one hand, the structural trend of the US to prioritise deterring a possible Chinese invasion of Taiwan, which could be tantamount to nothing short of terminating US hegemony in Asia and the Pacific. And, on the other hand, they illuminate Europe's need to secure continued US fealty to NATO's Article 5, premised on European countries picking up an ever greater share of the bill for conventional deterrence in Europe and, in exchange, retaining the US nuclear guarantee, as the ultimate deterrent against Russian aggression.

That being said, it is also commonly acknowledged that European states are determined to develop and deploy their own strategic enablers so that they do not become hostages to diverging US priorities, relating to collective European defence, or to US determination to leverage its military indispensability to extract rents from Europe via its trade and/or monetary policy^[25].

Such enablers refer, first, to achieving economies of scale in the production of weapon platforms that are already within the technological reach of EU member-states, via EDTIB consolidation. Economies of scale in already available technologies would underpin strategic autonomy by producing enough quantities of limited in number platforms, by a consolidated EDTIB, so that the EU can deter against Russia, with the massive quantities of war materiel that the return of peer to peer conflict necessitates.

Second, strategic enablers are for the EU those technologies and weapon platforms which are currently provided by the US, as EU countries have not developed comparable capabilities. They refer, mainly, to strategic lift, ISR based on an extensive satellite network, sixth generation aircraft and long range ground to air and ground to ground missile systems.

Obtaining such enablers is a profoundly political exercise, the success of which would be constitutive of an essentially evolved European polity, which has already received the relevant coined terms, such as 'a geopolitical Europe' of a European 'defence community' and so on^[26]. While EU member countries have indeed sacrificed the important for the sake of the urgent, as in the case of covering capability gaps which have accumulated over two decades by procuring US and Israeli weapon systems, setting back the cause of the EU's strategic autonomy, the direction of travel towards a European defence polity is still clear.

Such a polity, to come into being, requires achieving consensus, as per the Draghi Report recommendations^[27], on a massive, recurrent programme of debt issuance by the European Commission. Such issuance would fund, among other priority domains, the research, development and production of the EU's strategic enablers as well as provide the fiscal incentivisation of joint procurement necessary for the EDTIB's drive for economies of scale through industrial consolidation. The alternative, and more modest policy suggestion, is based on shifting resources from cohesion funding and the Common Agricultural Policy to collective European defence spending.

Both courses of action are highly contestable politically[28]. The former course of action needs to overcome the reluctance of net contributors among EU member states to underwrite fiscal issuance by the EU while the latter course of action means overcoming the reluctance of the net recipients, among EU member countries, to see a substantial decline in fiscal resources directed to those socioeconomic groups and regions most depended on EU transfers.

That being said, either exercise can also command a unique common ground among EU member states which were only recently, during the euro's fiscal crisis, in opposing camps. Strengthening the EU's collective defence is a shared priority from the very end of both the North and the South, in the EU's eastern periphery, from Lithuania to Cyprus. Defence has shortened if not collapsed the policy distance separating the 'frugals' from the 'spendthrifts' with leading members of both cohorts facing existential threats due to the partial disengagement and growing unreliability of the US security guarantee. To illustrate, when the US Department of Defence starts considering withdrawing military aid from the Baltics[29], Denmark, Sweden and Finland have every reason to boost the EU's common defence and entertain financial arrangements, such as common bond issuance, that a fiscally constrained Greece would most welcome.

Significantly, the blatant assertion by the Trump Administration that Greenland will, one way or another, fall under US sovereignty, has universalized the perception of threat, cutting its unbiblical cord from Russia, and impressing on all member-states that the capacity for collective defence needs to be developed against all threat contingencies. Simply put, it makes it that much easier for Greek policy makers to relate to their EU colleagues how serious as much as unacceptable is Turkey's comportment on the basis of 'might is right' and, as such, deserving of a common European response. And once threat loses its specificity, threat representation becomes important, as each and every threat is entitled to be addressed and no threat posed to a member-states' national security can be airily dismissed as an unrealistic obsession, as a mere domestic perception as opposed to a geopolitical fact. Arguably, as the recommendations of the Niinisto report are implemented, particularly with regard to a common EU intelligence function, that will have the effect of Europeanising each member country's valid threat perceptions[30], rendering ever more untenable defence industrial and other policies that are incompatible with such Europeanised threat perceptions. Suffice it to say here that Turkey's gray zone playbook vis a vis Greece and Cyprus is starkly similar to that of Russia in CEE and in the Baltics and China in the South China Sea.

Denmark is emblematic in that regard, a small Scandinavian country, one of the 'frugals' during the Eurozone crisis, now in favour of rising defence expenditures, in order to deter Russia, as in the case of all Scandinavian countries which are with the exception of Finland in the second line of defence against Russia, while also being the first EU member country to have its sovereignty challenged by the US[31].

The drive of the EU for strategic autonomy, tantamount to the construction of a new European polity, both puts the importance of the TDTIB, but also of the Turkish Armed Forces, in its appropriate scale, as important but by no stretch of imagination indispensable, in terms of providing scarce material and human resources to Europe's collective defence. It is the intra-European consensus necessary for collective mobilization that is indispensable, not the contribution to such a vast mobilization of any one third party, Turkey included.

This is even more the case when such a third party participation is corrosive of the consensus that needs to be achieved. For that level of consensus to be generated, all member states need to be convinced that collective defence is one and indivisible, just as within any nation-state one region bordering to a third country has an absolutely equal claim to its integrity and rights, conferred by its inclusion in the sovereign entity, to all other regions of that country bordering with other third countries. It is that foundational assumption that is indispensable to the project of the EU's strategic autonomy.

It is also important to note that it is inevitable that the more the EU develops its strategic autonomy the less this autonomy will come to be limited to countering the Russian threat. Military capabilities, as much as the modalities of their acquisition, will expand the domains of their application, commensurately with their growth. These capabilities may be deployed in a massive operation to stabilize sub-Saharan Africa. On another occasion, they could embolden the EU to risk rupture with the US, by imposing punitive regulations to US IT titans operating in the EU, in case of a forceful acquisition of Greenland by the US. In yet another possibility, the EU's military

capabilities could provide leverage to the EU to exert moderating influence over Israel's behaviour in the West Bank due to the growing reliance of Israel's DTIB on the rapidly growing EDTIB.

Greece together with Cyprus are not stowaways in this exciting European voyage but rather key members of the crew. Greece is the only country in the EU to be so physically distant to Moscow that in 2024 spent above 3 % of its GDP in defence - as much or nearly as much as those EU member countries close to Moscow. Through the port of Alexandroupolis it has proven its significance, in terms of military logistics, for the integrity of the Southern part of the EU's collective defence against the Russian Federation as well as for the support of the energy needs of Bulgaria and Romania through the Alexandroupolis FSRU. Greece has also taken the lead in the setting up of EUNAVFOR ASPIDES which seeks to mitigate Houthi attacks against the merchant marine in the Red Sea - where the Turkish navy has been conspicuously absent^[32]. Needless to say in the years ahead, as the Hellenic Navy renews its fleet and as other EU Mediterranean Fleets similarly get strengthened, Greece will be a pillar of freedom of navigation in the critical seaways linking Asia with Europe.

Both Greece and Cyprus reaffirmed their strategic importance due to the wars of the Middle East with the heavy use respectively of the US Suda Bay base in Crete and the UK Akrotiri base in Cyprus. Greece, as already suggested enjoys important leverage in the US, considering that US engagement will continue to be important for the EU's collective defence. The Suba Bay base is critical to the operations of the US Navy and Air Force in the Mediterranean. Alexandroupolis is a point of entry for US natural gas servicing Southern European energy needs, the defence relationship with Israel is growing as it involves strategic Israeli investments in the GDTIB and the Greek-American lobby, in alignment with the Jewish-American lobby enjoys considerable influence in the US Congress^[33].

All in all, Greece, both on its own and together with Cyprus, as a typically medium-sized EU member country, with its contribution to the ongoing defence effort against Russian aggression, its participation in mitigating the negative consequences of the Middle East wars, its exceptionally high defence spending and its military and geopolitical contributions that it will be able to make in the future strategically autonomous Europe - a Europe that will have to confront a threat diversity commensurate with its growing strategic autonomy - represents precisely the type of EU member country that needs to have its own threat environment acknowledged and addressed if there is to be a successful construction of a European polity that guarantees the safety of all its member-states. And in such a European polity there is no place for defence firms of a non-EU member that persists in threatening an EU member country, such as Turkey.

The TDTIB and the EU's Rearmament: Simply not worth the trouble

A flurry of policy papers and press coverage have presented the TDITB as indispensable to the EU's rearmament and/or, more largely, argued for the vital role that Turkey needs to play in Europe's collective defence^[34].

This advocacy is grounded in three claims. First, that the TDITB is critical both in terms of filling the need of the EU for manufacturing of mass, reliable quality, NATO-standard defence articles as well as in addressing important niche capabilities as in the UAV domain. Second, such an TDTIB participation will enable the EU to avail itself of the Turkey's Armed Forces manpower in case it decides to sent a peacekeeping force to Ukraine, considering that it is the second largest Army in NATO and that the Turkish government has a high tolerance, at least compared to European governments, for casualties in the field of battle. Third that such a package - TDTIB and the contribution of troops - will anchor Turkey in the Western alliance.

None of these arguments are to be easily dismissed but rather carefully weighted in the cost benefit calculations and robust risk assessments that are attendant to any difficult policy choice.

On the TDTIB aspect what is essential to point out is that its relative contribution to the EU's rearmament effort is a declining rather than a rising asset, precisely because of the mobilisation of resources in EU member countries catalyzed by country-member, EU funding and strategic and portfolio investments in the EDTIB as well as in parallel developments taking place in key EU-allied countries, European and non-European, such as the UK, Ukraine, Norway and Canada. On mass what we see in the EU is a combination of investment in new plants and machinery, investments in older plants including reactivation, with a special focus on the Central Eastern European defence industry which had not attracted FDI in the transition period, due to peace dividend dynamics.

We can expect that German and CEE experience in activating industrial supply chains in the post - 1989 period in the civilian sector where it has excelled, will now prove its worth in the military domain. In niche capabilities such as UAVs, innovation's baton has been decisively transferred from Turkey to Ukraine with a variety of European defence firms operating in Ukraine and / or partnering with Ukrainian firms in order to be able to be innovative. What is striking in the latest assessment of defence manufacturing in Europe[35] is the common playbook, on top of increases in defence spending, adopted by all significant, in defence manufacturing terms, European countries, all geared to increasing the supply of defence platforms, systems and materiel: relaxation of regulatory environment relating to defence manufacturing, the speeding up of procurement through reform, increased funding for innovation in defence, investing in the defence sector's skills base, and so on. Relatedly, the TDTIB is identified as a meaningful contributor only in one capability gap of collective European defence, in medium altitude long endurance (MALE) UAVs and, potentially, in land attack systems up to 1,000 kms[36]. This rather marginal role of the TDTIB in Europe's capability building is also reflected in its export record of defence systems to European countries which mostly involves low or middle range technologies such as MALE UAVs, corvettes and armoured personnel carriers[37]. Inevitably Turkey's mid size economy, with its mediocre innovation record, cannot rise to the challenge of contributing, let alone replacing, such US-originating capabilities as space-based ISR, integrated air and missile defence, battle management systems and long range attack systems[38].

Relatedly, the increasingly well-funded defence industrial strategies of those EU member state's that have them, also focus on the UAVs and other niches so as to spur innovation in their own defence sectors. Their twin motive is both to provide a qualitative edge to their own armed forces via homegrown innovation and to be able to leverage this edge to commercial success throughout Europe. Indeed, the TDTIB itself partakes in this process with the industrial presence in Ukraine of its most prominent UAV manufacturer, Bayraktar. In the end nobody intimated this decline in relative terms of the TDTIB than one of its most fervent advocates, NATO Secretary General Mark Rutte. Pointing out that Europe in seeking to prevail militarily over Russia, needs to prevail, by mobilising its economic prowess, over an "economy [that] is not bigger than *Texas*. So can *you* imagine that *Texas*, the State of *Texas*, producing more ammunition than the whole of NATO?"[39]. By the same token, how credible is to argue that the whole of the EDTIB cannot, when effectively mobilized, cannot produce the defence materiel necessary to deter against Russian aggression, without the participation of an economy, namely Turkey's, which is just a bit larger than that of the state of Illinois, which is to say 1/17th of the EU's GDP?

Similar dynamics are operative in terms of the availability of sufficiently manned units to be fielded by EU and non-EU countries, most prominently the UK, in the much discussed prospect of a European peace keeping force in Ukraine. The advisability of such a mission has been contested but that is not the issue. As with the EDTIB there is an ongoing effort across Europe to both hire more professional soldiers and reintroduce conscription[40]. We do not believe that higher tolerance of casualties, on the part of the Turkish government, and more largely polity and society is a valid argument for two reasons. First, European states have demonstrated in Afghanistan, through participation in ISAF, that they are willing to suffer casualties in the service of vital allied goals (in this case supporting US operations in Afghanistan not least so as to help preserve US commitment to the collective defence of Europe). It is worth pointing out that eight EU member countries, from Denmark (population 5.5. million) to Germany (population 82 million), suffered more casualties, both relative to their population and in absolute terms, through their ISAF participation, than Turkey did[41]. More generally the west's democracies have demonstrated their ability to generate parliamentary consensus when invoking allied commitments in order to put troops in harm's way[42]. Indeed, the rise of the EU as a collective provider has added a case example in this canon by enabling the Greek government to participate in the high risk EUNAVFOR ASPIDES freedom of navigation mission where the Hellenic Navy employed its guns for the first time since WW II, in an allied operation. Nor is it credible to suggest that in any such operation in Ukraine Turkey would play the role of the mercenary, putting at risk of death or injury a disproportionate number of its soldiers than other European states, in a mission that is definitive for the collective will of Europe and more specifically for the EU and its member states to defend themselves. So, as in the case of the TDTIB, we are talking about a useful but not indispensable contribution in risk-taking troops. As with the Rutte evocation of the disparity between collective European versus Russian economic-industrial mobilization, so with force generation we recall Poland's PM rhetorical evocation of the EU's collective population preponderance: '500 million Europeans are asking 300 million Americans help fight 140 million Russians'[43]. To suggest that such a Europe, of 500 million Europeans, cannot muster a peacekeeping force in the tens of thousands, for the defence of Ukraine, without Turkey's troop contribution is simply risible.

The third argument of the TDTIB's participation in the EU's rearmament is about Turkey's geopolitical and economic importance, and the importance of TDTIB participation in Europe's rearmament as a means of engaging with Turkey, of in effect 'not losing' Turkey. It is important to note that within Turkish opinion, there is a diversity of opinion. We do have Imamoglou's own advocacy in favour of lifting the embargo to the sale of Typhoons to Turkey^[44] as well as arguments of critics of the Erdogan regime to the effect that an EDTIB-TDTIB relationship will affirm Turkey's European vocation and is bound to outlive Erdogan's authoritarian turn^[45]. Equally, we have voices arguing that the EU should not reward Turkey's authoritarian backsliding, due to its potential contribution to the EU's rearmament, as this backsliding no more entrenched it becomes there more bound it is to make Turkey even more of an unreliable security partner to the EU^[46].

The position of this paper is that the imperative of Erdogan's maintaining himself in power privileges further internal repression and external aggression and that the opportunity of the TDTIB to participate in the EU's rearmament is not a sufficient incentive for him to abandon this twin track approach. At the point of writing developments on both tracks prove our point, with further politically-engineered court actions seeking to neutralize CHP as an effective political force and the threat of military brinkmanship hanging over Greece's and Cyprus' perfectly legitimate plans to connect themselves energy-wise by laying the GSI undersea cable. It is indeed hard to see how Turkey, even if its TDTIB is definitively excluded from the EU's rearmament, can be lost to Europe more than it already has. It is, however, much more plausible to envisage a situation whereby a growing reliance of Europe on the TDTIB could lead Erdogan to miscalculate his personal importance, and that of his country, and make him even more reckless vis a vis Greece and Cyprus.

Concluding Remarks

Turkey neither can nor should participate, through the TDTIB, in Europe's rearmament effort and for the same set of reasons.

Under Erdogan's leadership and in the current geopolitical juncture Turkey has reaffirmed a pattern in its relations with the West that has rendered partnering with the TDTIB highly unstable as much as undesirable. Unstable because the combination of internal repression and external aggression, by the Turkish leadership, mobilises an influential counter-reaction by western states and influential lobby groups in these states, which prioritises the cut-off of bilateral or multilateral defence industrial relationships. Undesirable, because allowing for such defence industrial relationships to continue, despite Turkey's internal and external comportment, is bound to be corrosive to the norms and interests binding collective security arrangements among EU member-states.

Greek-Turkish relations, from this 'neither can nor should' prism are both illuminating and definitive, historically and currently. Historically, the birth of TDTIB in the post WWII period was due to the need of Turkey to invade and partly conquer Cyprus, an act that destabilised NATO, led to an unprecedented US embargo of weapons sales to Turkey and which has as its only peer event in the European continent, in the entire post WW II period, the invasion of Ukraine by Russia in 2022. Currently, Erdogan's determination to challenge Greek sovereign rights through actions in the field and diplomatically, even more so if they are successful, they are bound to either create insurmountable blocks to the entry or generate risks in the ongoing participation of the TDTIB in Europe's rearmament effort. Appropriately enough such an incongruity is addressed by the SAFE regulation conditionalities, as in the case of article 17^[50]. We have argued in these pages that Erdogan has, through his policy choices, to let these roadblocks in place, because doing so is a 'must have' whereas participation of the TDTIB in Europe's rearmament is only a 'nice to have'.

This calculation between the 'must have' and 'nice to have' is even more pronounced in the case of Erdogan's uninhibited suppression of democratic contestation, as allowing such contestation would be equal to his loss of power. Inevitably, external aggression and internal repression compound each other, strengthening both the 'cant' and 'shouldn't' of the participation of the TDTIB in Europe's rearmament.

Finally, we have argued that the resource mobilization necessary for the EU to gain strategic autonomy, both in the ambitious scenario (Draghi recommendations) and the modest scenario (reordering of the EU budget), would render the TDTIB contribution to Europe's rearmament if not marginal definitely not critical. At the same time such a participation, under the 'can't and shouldn't' perspective would be both highly uncertain in its implementation and

much more trouble than its worth, due to the resulting corrosion of the intra-EU consensus on which this mobilization needs to rest upon.

As for the icing of the European cake, a strategically autonomous Europe would substantially fill the vacuum left from an Asia-oriented US, put an end to Turkey's geopolitical heterodoxy and convince its leadership to integrate Turkey with the EU's CS.

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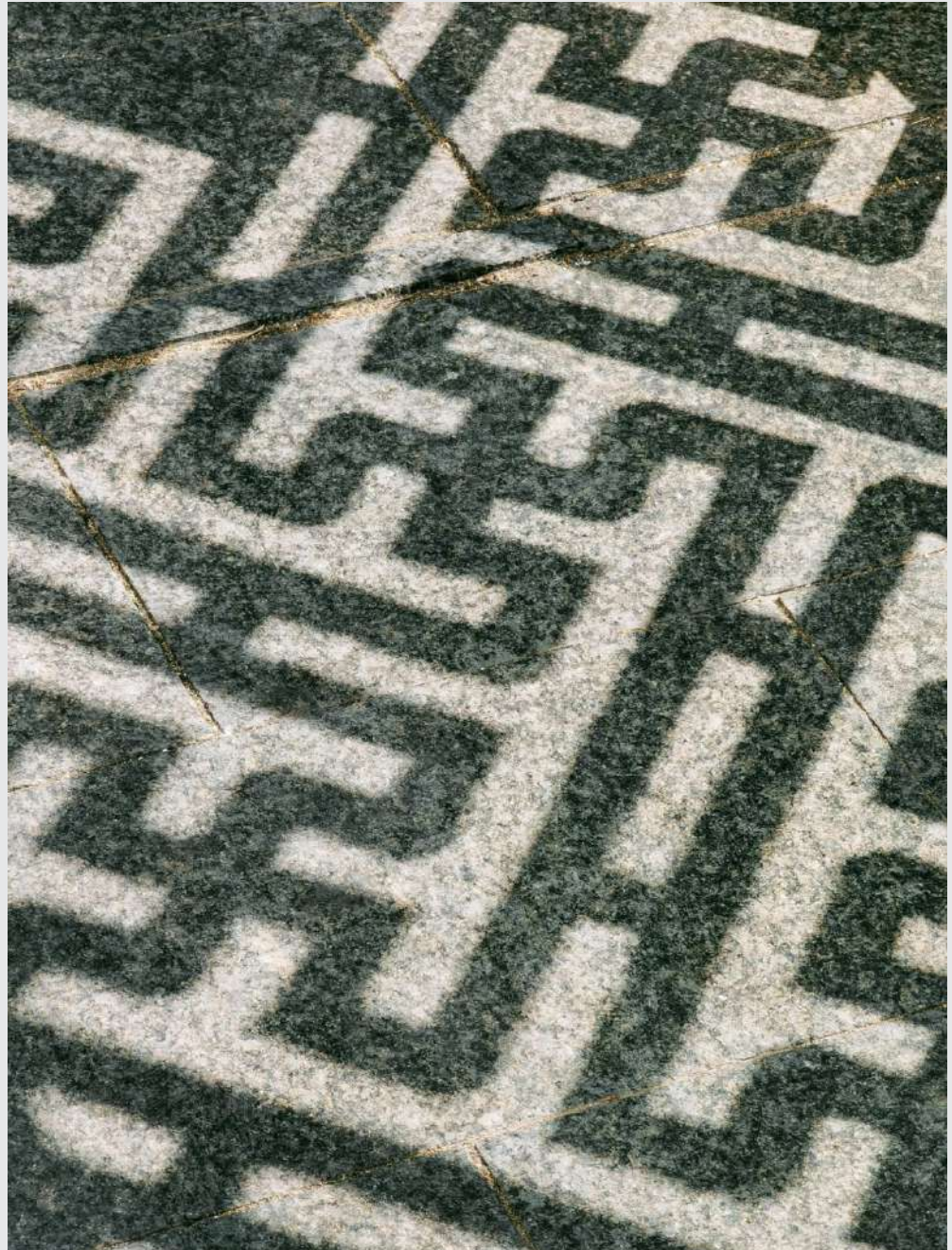
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The Venezuelan labyrinth: A crisis reframed

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Summary

- Venezuela's crisis has long been narrated through an opposition prism: crowds in the streets demanding democracy, negotiations or contested ballots. In 2025, the spotlight has shifted. The decisive question is not how hard Venezuelans push but what the United States is prepared to do, and why.
- A draft defence review proposes a major redeployment. Led by under-secretary Elbridge Colby, it calls for concentrating military power on the homeland and the Americas. The plan envisages shifting forces away from Europe and the Indo-Pacific and expanding air and naval operations along the southern U.S. border and throughout the Caribbean. It revives the logic of the Monroe Doctrine: prevent rival powers from embedding in Latin America.
- For the architects of Washington's new Venezuela campaign, success will be judged less by what happens in Caracas than by how it plays in Washington DC or Florida. By measuring success in domestic terms, the United States may very well leave Venezuelans no closer to the democracy they seek.
- Washington's handling of the Venezuelan crisis could be a preview of a wider strategic realignment. Colby's "homeland first, hemisphere next" doctrine would pull military assets from the East and surge them into the Americas.
- Latin America's response reflects both caution and fatigue. They will hedge: criticise the optics of U.S. gunboat diplomacy while quietly ignoring any weakening of the Maduro regime.
- The regime's only remaining legitimacy is the loyalty of its security apparatus and the fear it can instill.
- The opposition, meanwhile, still holds the moral mandate. That legitimacy now carries even more weight after María Corina Machado was awarded the 2025 Nobel Peace Prize.
- Against that backdrop, four trajectories remain on the table for the crisis itself: 1) Ruling-party managed transition; 2) Negotiated exit; 3) Forced removal; 4) Regime endurance.
- Venezuela's impasse is fast becoming a proving ground for Washington's "America first" doctrine and a primary focus on the Western Hemisphere in their foreign policy in decades.
- The backdrop is a country with its people exhausted, and its institutions hollowed out so internally in Venezuela very little should be expected. A purely theatrical strike may consolidate the status quo rather than topple it. If the United States genuinely wants systemic change, it will need more than sinking boats and slogans, it will need a strategy that endures beyond the next news cycle. Whether that is what President Trump actually seeks remains an open question.

VENEZUELA'S CRISIS HAS LONG BEEN NARRATED THROUGH AN OPPOSITION PRISM: crowds in the streets demanding democracy, negotiations or contested ballots. In 2025, the spotlight has shifted. The decisive question is not how hard Venezuelans push but **what the United States is prepared to do**, and why. The United States deployed a naval buildup that includes more than 10 ships, including amphibious assault ships, a nuclear-powered submarine, a special operations ship and an aircraft carrier, unprecedented to the Caribbean. For all that, the Venezuelan portfolio does not solely sit in the Pentagon or the State Department: Stephen Miller, the president's homeland security adviser, has also taken a leading role in deciding which vessels to target. U.S. forces have so far destroyed sixteen suspected drug-smuggling boats in international waters. This intervention could underscore a new viewpoint: is this campaign choreographed for a U.S. audience? Furthermore, how far are they willing to go?

A Don-Roe Doctrine?

Two forces shape the Caribbean stand-off. First is a policy shift. President Donald Trump returned to office on an agenda that places national security, economic strength and sovereignty ahead of traditional diplomacy. Marco Rubio, the new secretary of state and the first Hispanic to hold the job, has been tasked with turning that creed into policy. The State Department's first hundred-day report notes that foreign-aid programs were cut and visa rules tightened to ensure U.S. dollars serve "America First" priorities. It also touts persuading Panama and other Central American countries to reduce cooperation with China's Belt and Road infrastructure plans. The message is clear: the Western Hemisphere is once again Washington's sphere of influence.

The plan envisages shifting forces away from Europe and the Indo-Pacific and expanding air and naval operations along the southern U.S. border and throughout the Caribbean.

Second, a draft defence review proposes a major redeployment. Led by under-secretary Elbridge Colby, it calls for concentrating military power on the homeland and the Americas. The plan envisages shifting forces away from

Europe and the Indo-Pacific and expanding air and naval operations along the southern U.S. border and throughout the Caribbean. It revives the logic of the Monroe Doctrine: prevent rival powers from embedding in Latin America. In this view, Venezuela is not simply a faltering dictatorship but a potential beachhead for Iranian or Russian influence; deterrence must be visible and follow in line with this administration's motto of 'peace through strength'.

Always Victory at Home

For the architects of Washington's new Venezuela campaign, success will be judged less by what happens in Caracas than by how it plays in Washington DC or Florida. The White House homeland-security adviser, Stephen Miller, chairs a reworked council that picks targets and sometimes sidelines the State Department. He has reportedly described the government in Caracas as a cartel—language calibrated for a domestic audience that wants to see criminals punished. War Secretary Pete Hegseth told marines aboard the USS Iwo Jima that their deployment is not a drill but a real-world mission to “end the poisoning of Americans,” casting it as a crusade that keeps citizens safe. The presence of these two figures, alongside Secretary of State Marco Rubio, underscores how closely the 'MAGA' operation aligns with familiar Republican hawkishness: tough on security, unilateral when necessary, and keenly aware of how it plays in the electoral map.

Mr Rubio's involvement also reflects personal and political ties. As Florida's former senator he cultivated deep relationships with Venezuela's opposition; he once called María Corina Machado, the most recent Nobel Peace Prize Laureate, the “Iron Lady” of her country and published an op-ed praising her courage. He knows that Venezuelan-American and Cuban-American voters are pivotal in his home state, and he is not alone in seeing the Caribbean as fertile ground for political capital. For all three men, pressing a regime they see on the ropes may look like a low-hanging fruit: a way to showcase toughness, score points with a conservative base and, perhaps, advance their own ambitions.

The question is whether this chase for a domestic victory will actually change anything inside Venezuela. By measuring success in domestic terms, the United States may very well leave Venezuelans no closer to the democracy they seek.

In this view, Caracas is both a proxy and an opportunity: neutralise a hostile regime, demonstrate that Washington will police its neighbourhood and send a message to US' voters that the administration is protecting the homeland. The question is whether this chase for a domestic victory will actually change anything inside Venezuela. By measuring success in domestic terms, the United States may very well leave Venezuelans no closer to the democracy they seek.

What can Europe learn from the Caribbean

Washington's handling of the Venezuelan crisis could be a preview of a wider strategic realignment.

Washington's handling of the Venezuelan crisis could be a preview of a wider strategic realignment. Colby's “homeland first, hemisphere next” doctrine would pull military assets from the East and surge them into the Americas. In practical terms, that would mean fewer ships and aircraft watching the South China Sea or the Baltic Sea, and more watching the Caribbean and the southern border. For instance, the U.S. Navy's most powerful aircraft carrier, USS Gerald R. Ford, and its strike group departed from Croatia and are heading to the Caribbean for a new deployment. Latin America becomes the arena where America wants to prove it can still dominate without alliances, while Europe and Asia get pushed down the priority list.

This administration also seems to be resuscitating the Reagan-Bush discourse of the “war on drugs”. Four lethal U.S. strikes against drug boats in the Caribbean are being justified as part of a “non-international armed conflict” with terrorist cartels. In other words, this administration sees little threats in a geopolitical context of democracy vs. autocracy as well as no need to consult international allies or Congress. Domestic optics—especially playing to voters who want a hard line on drugs and immigration—seem to matter more than European approval or Asian

deterrence. The Venezuelan case suggests that, for the foreseeable future, U.S. security decisions may be shaped less by global consensus and more by domestic calculations with a Monroe-style sphere of influence twist.

Reaction from the Neighbourhood

Latin America's response reflects both caution and fatigue. Brazil's President Luiz Inácio Lula da Silva described the U.S. naval buildup as a source of tension and warned it could threaten regional peace. He noted that Washington's drug-trafficking accusations lacked evidence and that the lethal strike on a boat was likely illegal. The comment signals the delicate position of governments that distrust Mr Maduro but also remember past US interventions contemptuously. In Mexico City, Mr Rubio faced questions about sovereignty even as he promised deeper cooperation with President Claudia Sheinbaum. Mexico and Brazil may oppose an 'invasion' but are unlikely to expend political capital defending Caracas. They will hedge: criticise the optics of U.S. gunboat diplomacy while quietly ignoring any weakening of the Maduro regime.

As Venezuela's largest neighbour and leading diplomatic power in South America, Brazil is deeply concerned that a forced collapse of the Maduro regime would trigger mass migration to its northern frontier, regional militarisation, and paramilitary spillover.

As Venezuela's largest neighbour and leading diplomatic power in South America, Brazil is deeply concerned that a forced collapse of the Maduro regime would trigger mass migration to its northern frontier, regional militarisation, and paramilitary spillover. This pushes Brazil to continue favoring a negotiated scenario, yet Brazil's influence has proven limited in the past. The opposition pointed to how it could not secure safe passage for dissidents under its protection in Caracas, and how little diplomatic pressure any international actor can put on Maduro. Brazil will continue to signal to the US against any form of intervention, will quietly promote talks, and essentially seek stability on its border regardless of the fate of Mr. Maduro.

Legitimacy at a Nadir

All this is happening while Mr Maduro's own standing is at its lowest. International observers and independent tallies agree that opposition candidate Edmundo González Urrutia won the 2024 presidential vote, only for the regime to rewrite the results. Even some of Mr Maduro's traditional allies in the region—like Brazil and Colombia—acknowledged doubts about the election's legitimacy and declined to recognise his new mandate. The regime's only remaining legitimacy is the loyalty of its security apparatus and the fear it can instill.

Yet that loyalty is brittle. Years of purges and politicisation have left the armed forces fractured. This fragmentation has done two things at once: it has prevented a coup—no faction is strong enough to depose Mr Maduro—yet it also means that if he falls, no coherent military bloc is likely to topple his successor.

As U.S. warships drew closer in September, he ordered the Bolivarian National Militia—a civilian force attached to the armed forces—instead of the Army to prepare to “defend the homeland.” In other words, the state's coercive power rests as much on politicised volunteers as on the regular army—a sign of weakness rather than strength.

Years of dictatorship have also depoliticised society. Under the weight of hyperinflation and collapsing services, many Venezuelans have turned away from ideological debate; politics is secondary to hunger and survival. This makes Mr Maduro's appeals to defend the homeland against imperialism ring hollow for large swathes of the population. A militarised mobilisation might energise loyalists who benefit from the status quo, but it does not convince those who are simply trying to feed their families. The contrast is stark: on one side, an ageing elite clinging to power; on the other, a society more concerned with the price of food than with slogans about sovereignty.

The opposition, meanwhile, still holds the moral mandate. That legitimacy now carries even more weight after María Corina Machado was awarded the 2025 Nobel Peace Prize.

The opposition, meanwhile, still holds the moral mandate. That legitimacy now carries even more weight after María Corina Machado was awarded the 2025 Nobel Peace Prize. It is a powerful endorsement at home and

abroad, yet the opposition has not been able to translate its moral authority into decisive action. With prominent leaders jailed, exiled or underground, Machado is the only widely recognised voice, operating from the shadows yet carrying a broad popular mandate. Her ally Edmundo González, widely regarded as the true winner of the 2024 election, speaks from abroad; together they embody a legitimacy that the regime lacks, though they cannot convert it into power while the armed forces remain fragmented and society is exhausted by poverty and persecution. That credibility matters in a post-Maduro scenario: there is a leader to hand the reins to, even if the day-to-day structures of the state are in disarray. But the longer the standoff drags on, the more the opposition risks becoming symbolic rather than operational. The stalemate endures partly because everyone is too weak to break it.

Scenarios Beyond the Headlines

In Washington, the priority is a win that plays at home. The administration shows little interest in adjudicating who governs in Caracas; all signals suggest Mr. Trump's instinct is to avoid classic "regime change" so much so that the President failed to mention Maduro or Machado by name when he talked about his phone call with the Nobel Peace Prize winner. Is this enough to hypothesize that the US administration could land on a middle course, declare victory over "the cartels" for a domestic audience while steering clear of Venezuela's internal power struggle. Against that backdrop, four trajectories remain on the table for the crisis itself:

1. **Ruling-party managed transition:** The president may be replaced by senior figures within the ruling socialist party (for example Vice President Delcy Rodríguez). This would keep the regime's structures intact but remove its most toxic symbol. International actors might accept this as progress; the democratic opposition would reject this option and would look to access power through a rebellion.
2. **Negotiated exit:** Mr. Maduro, under intense international pressure and perhaps fearing arrest or death, could bargain for safe passage abroad, trading his exit for guarantees on his life and property. Such a deal would leave a power vacuum and require a caretaker government with some form of support from the military until fresh elections, which would likely be won by Mrs. Machado.
3. **Forced removal** - An internal coup, mass uprising or foreign-backed intervention could topple Mr Maduro. A new leadership, most likely stemming from the current opposition or unexpected military leaders would need rapid international support to prevent chaos and respond to the collapse of public services. Without a plan, local militias could fracture into insurgent groups with a very weak government on the ground.
4. **Regime endurance** - Mr. Maduro could survive the pressure as he did before, thanks to repression, inertia and a paralyzed opposition. The government would become more repressive and insular; hopes for a negotiated transition would fade, and the world would look away.

Will Optics Trump Outcomes?

If the United States genuinely wants systemic change, it will need more than sinking boats and slogans, it will need a strategy that endures beyond the next news cycle.

Venezuela's impasse is fast becoming a proving ground for Washington's "America first" doctrine and a primary focus on the Western Hemisphere in their foreign policy in decades. To some in this administration, reviving Monroe-era language, sinking a few boats, slap the label of "narco-terrorism" on an adversary, and declaring a mission accomplished to voters in Florida will be a win. To others, victory is only possible if the US collects Maduro's bounty, but there we will be entering into unknown territory, territory which could make President Trump uncomfortable. In addition, the backdrop is a country with its people exhausted, and its institutions hollowed out so internally in Venezuela very little should be expected. A purely theatrical strike may consolidate the status quo rather than topple it. If the United States genuinely wants systemic change, it will need more than sinking boats and slogans, it will need a strategy that endures beyond the next news cycle. Whether that is what President Trump actually seeks remains an open question.

ELIAMEP Explainer – Ukraine at a Winter Crossroads: Military Pressures, Energy Warfare, and Fractured Diplomacy

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As winter approaches, Ukraine confronts a multi-dimensional war challenge: not only are its forces locked in grinding combat on the frontline, but Russia has intensified its air strike campaign against the country's critical infrastructure.

At the same time, Western military aid, clandestine US-Russian peace-plan efforts, and economic pressure amid domestic corruption woes are expected to shape discussions in the next few weeks.

Bleaker Battlefield Situation Towards Winter

Russian forces continue to mount pressure on multiple fronts without achieving a decisive breakthrough. Key operations include efforts to encircle the Pokrovsk-Myrnohrad pocket and advances along the Siversk and Slovyansk-Lyman axes, potentially shaping the battlefield ahead of future offensives toward Ukraine's "Fortress Belt," according to the [latest assessment](#) by the Institute for the Study of War (ISW).

Simultaneously, Russia has intensified its strikes on Ukraine's energy infrastructure over the past couple of weeks, reaching also far into the Western parts of the country, which military experts expect will make the upcoming winter phase one of the most strategically significant of the conflict.

Ukraine has deployed secret battery parks - large U.S.-designed energy-storage systems - across at least six sites, including Kyiv and the Dnipropetrovsk region. These systems can provide emergency capacity, enabling electricity flow for hundreds of thousands of homes for short periods after attacks, buying engineers critical time for grid restoration.

This is essential because, according to former Ukrainian energy minister Olha Buslavets, more than half of Ukraine's generating capacity has already been destroyed or disabled by Russian strikes. The International Energy Agency (IEA) similarly [reports](#) extensive damage to thermal generation and key transmission nodes.

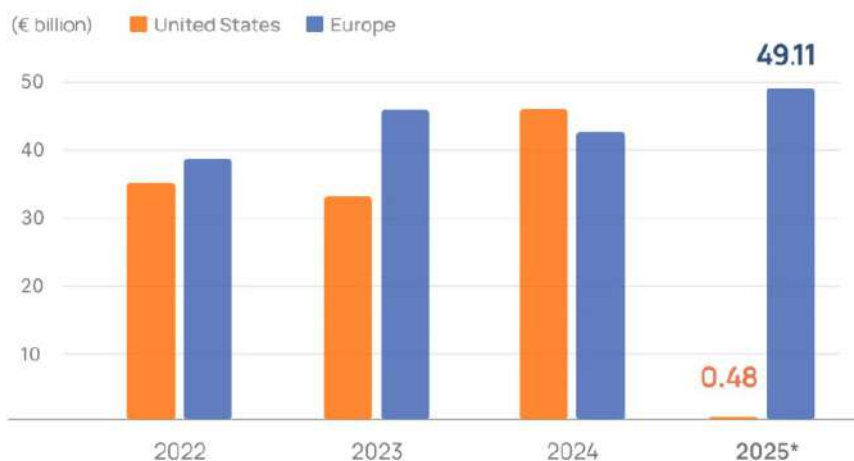
Russia's evolving tactics - more precise serial waves of drones attacks, often in the hundreds paired with hypersonic missiles - seek to overwhelm air defenses while targeting substations, gas infrastructure, and thermal plants.

These assaults serve dual purposes: undermining Ukraine's wartime industrial output and inflicting civilian hardship to weaken morale. In response, Ukrainian energy operators such as DTEK have [stepped up efforts](#) focusing on decentralization of power generation, reinforcing air defense around strategic nodes, and expanding renewable energy and storage systems.

State of US and EU Military Support

Europe starts footing the Ukraine bill

New aid allocations to Ukraine



*Support through August 2025

Source: The Kiel Institute for the World Economy

GZERO
everything is political

Western military support remains a lifeline for Ukraine as it absorbs simultaneous battlefield and energy-infrastructure pressures, but a sharp decline over summer, despite the introduction of NATO's Prioritized Ukraine Requirements List (PURL) initiative, has started to reflect on the battlefield.

The United States continues delivering high-end capabilities such as ATACMS missiles, enabling deeper operational reach into Russian territory. European partners are increasingly involved in co-production efforts - such as joint drone-interception technologies - to strengthen Ukraine's defensive posture. However, [analysts](#) point out that it is now mostly Europe that tries to fill US void in Ukraine funding.

Political uncertainties, additionally, complicate the picture.

The emergence of U.S.-brokered peace efforts (detailed below) raises concerns in European capitals about the durability of long-term support, particularly if Washington shifts toward a diplomacy-first approach that restricts Kyiv's military options.

Without firm, transparent coordination between Washington and European capitals, Ukraine's military planning horizon risks shrinking at a moment when Russia appears determined to sustain both its frontline offensives and its infrastructure-targeting campaign.

The Latest Ukraine Peace-Plan Push

Recent developments on the peace front are expected to, meanwhile, deepen diplomatic tensions: Steve Witkoff, the U.S. special envoy, is advancing a ["back-channel" 28-point peace plan](#) with Moscow that has raised serious alarm among European allies and Kyiv.

The plan reportedly demands significant territorial and military concessions from Ukraine, including giving up portions of the Donbas and imposing strict limits on Ukraine's armed forces.

Witkoff's back-channel plan risks deepening divisions between the U.S. and its European allies - just when cohesion is most needed. A peace deal crafted in isolation risks being unstable or lacking legitimacy among other stakeholders, which might invite renewed aggression or erode trust in Western guarantees.

The initiative has been pursued with minimal interagency coordination in Washington and virtually no consultation with European partners, who learned of the talks from the public domain.

European officials insist the plan must not simply reward Moscow's maximalist demands. EU foreign policy chief Kaja Kallas [publicly](#) pushed back against the approach on Thursday, saying any lasting peace must include both Ukraine and Europe, with many of her European counterparts emphasizing they had been taken by surprise by the proposal.

Kyiv, meanwhile, [could feel forced into making concessions under pressure](#), potentially undermining its long-term security and strategic autonomy. Ukrainian officials see the plan as jeopardizing core red lines: surrendering territory, reducing long-range strike capabilities, and limiting its ability to cooperate with Western militaries – all while being excluded from the design of the deal itself.

Adding to Ukraine's (and its allies) unease is domestic political pressure: the peace push coincides with a corruption scandal among Zelenskyy's inner circle, which some European diplomats privately believe could be weakening his bargaining position.

Washington's Energy Sanctions And Brussels' Move Targeting Russia's Shadow Fleet

Economically, Ukraine's Western allies continue to address Russia's war effort on a parallel track. The U.S. recently reiterated its willingness to support stringent energy sanctions designed to limit Russia's export revenues. Europe, meanwhile, as part of work on the 20th sanctions package, is intensely focused on dismantling Russia's "shadow fleet" - a network of ageing and often uninsured tankers that transport Russian oil in international waters while skirting Western sanctions.

The EU has advanced [new measures](#) to identify, restrict, and potentially seize these vessels. Current proposals include granting EU states the authority to inspect shadow-fleet tankers (in cooperation with flag states), listing not only the ships but the companies and intermediaries involved, and even sanctioning states that allow these vessels to register under their flags.

France and Germany have signaled openness to expanding maritime enforcement, while Poland and Baltic states advocate for maximum pressure, including sanctions aimed at the flag registries themselves.

As Russia leans heavily on its shadow fleet to maintain energy flows, the effectiveness of Western sanctions will increasingly depend on closing these maritime loopholes.

At the same time, EU member states and the European Commission are scrambling to resolve a political standoff ahead of the December EU summit over how to deploy roughly €140 billion in Russian frozen assets held in Europe. Belgium, which holds the bulk of these funds, has blocked earlier proposals, [demanding](#) “legally binding, unconditional, irrevocable” guarantees from other EU states to share any future potential risk of litigation or retaliation from Russia.

As some member states remain wary as they fear both the legal precedent and the potential financial fallout, EU leaders will face the challenge to bridge a broader EU divide about how to finance Ukraine support in the long-term as Kyiv faced a [financing gap](#) of around €135 billion over the next two years.

Conclusion

Ukraine is fighting a war on multiple fronts: kinetic battles in Donbas and the east; a deliberate sabotage campaign against its energy grid; a complex and wavering environment of Western military support; and diplomatic maneuvering that risks leaving Kyiv and Europe sidelined.

The outcome of the winter will shape not only battlefield momentum but the overall trajectory of the war.

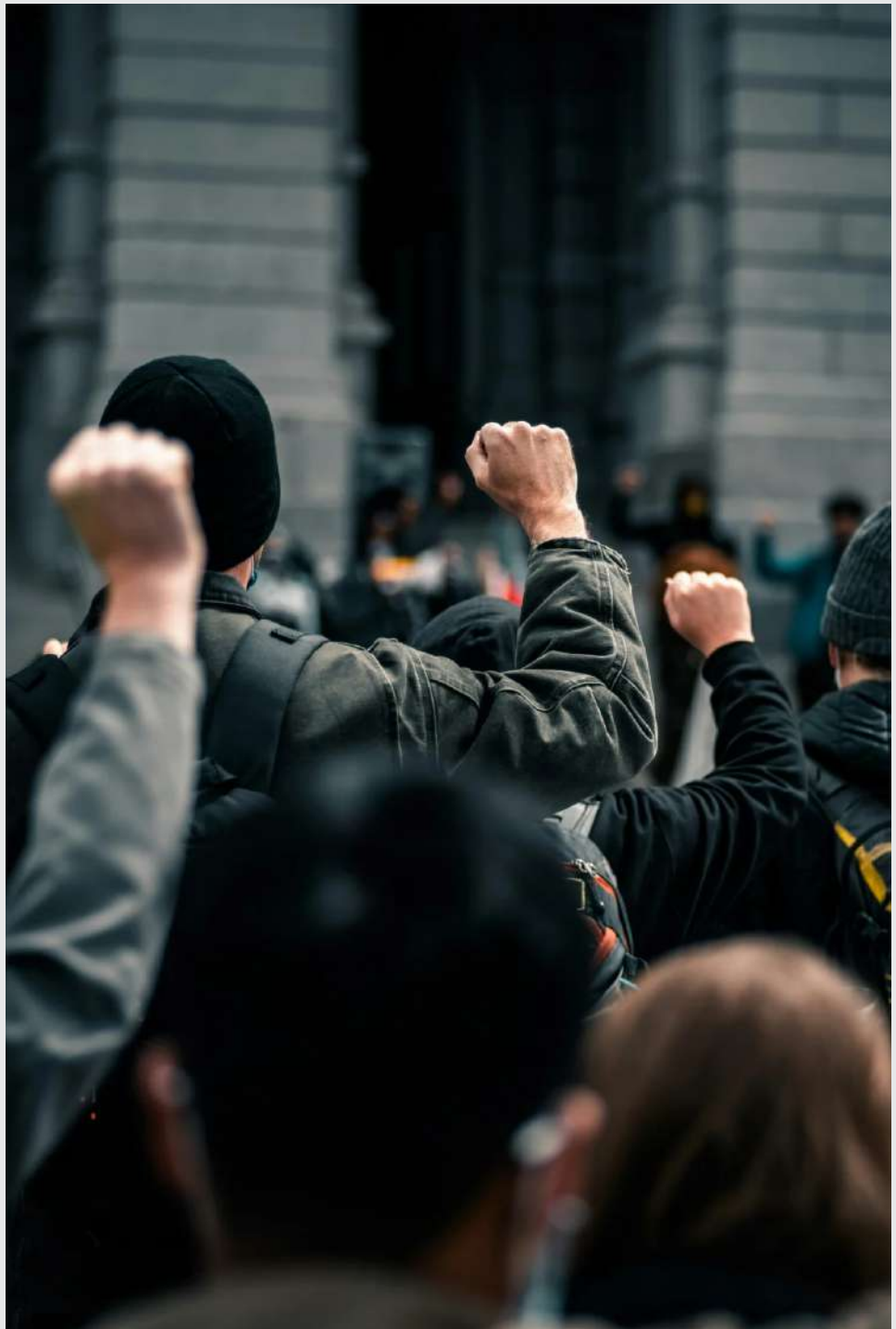
Ukraine’s President Volodymyr Zelenskyy managed secure Rafale fighter jets, air defence systems and guaranteed gas supplies after his recent visits to France, Greece and Spain.

But sustained Western cohesion - and Ukraine’s ability to absorb both military and infrastructure shocks - will determine whether Kyiv enters the next phase from a position of resilience or vulnerability.

Polarization as a result of crises and the rise of radicalization leading to violent extremism in Western societies

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November 2025



Περίληψη

- Η πόλωση ως επίπτωση των κρίσεων και η σύνδεση της με την ριζοσπαστικοποίηση που οδηγεί στον βίαιο εξτρεισμό μέσω της μελέτης δύο κρίσεων: α) της μεταναστευτικής/ προσφυγικής κρίσης του 2015- 2016 και β) της πανδημίας.
- Σημαντικό μέρος του προβλήματος είναι η πολιτική νομιμοποίηση των εξτρεμιστικών αφηγημάτων, η επιλογή δηλαδή πολιτικών να αξιοποιούν όλο και περισσότερο ακροδεξιά και συνωμοσιολογικά αφηγήματα που υποστηρίζουν τμήματα του πληθυσμού τα τελευταία χρόνια.
- Η πόλωση είναι ζήτημα που αφορά ομάδες ατόμων και όχι μοναχικούς δρώντες
- Ο κίνδυνος της σύγκρουσης μεγεθύνεται όταν η κοινωνία είναι χωρισμένη σε δύο ισόποσες ομάδες με ανταγωνιστικούς στόχους»
- Οι πολύ- κρίσεις είναι περισσότερο επικίνδυνες, καθώς από τη μία πλευρά ασκούν μεγαλύτερη πίεση στους μηχανισμούς διαχείρισης των κρατών και από την άλλη διευρύνουν την ευαλωτότητα κοινωνιών, ομάδων και ατόμων.
- Έχει δημιουργηθεί μια ευρεία αίσθηση δημοκρατικού ελλείμματος και δύο επάλληλες διαδικασίες αμφισβήτησης που οδηγούν σε κρίση: α) εμπιστοσύνης και β) αντιπροσώπευσης.
- Η παρατεταμένη πόλωση έχει οδηγήσει στη ριζοσπαστικοποίηση μεγάλου αριθμού πολιτών, χωρίς απαραίτητα αυτή να έχει προκύψει από την υποστήριξη μίας συγκεκριμένης ιδεολογίας
- Η παραπληροφόρηση, η διασπορά ψευδών ειδήσεων και η διάχυση θεωριών συνωμοσίας συνιστούν απειλή για τη δημοκρατία και έχουν προκαλέσει σημαντικά προβλήματα σε εκλογικές διαδικασίες και τροφοδοτούν την πόλωση.
- Η πανδημία, λειτούργησε ως καταλύτης και επηρέασε τη ριζοσπαστικοποίηση, αλλά και τον τρόπο δραστηριοποίησης των εξτρεμιστικών ομάδων.

Εισαγωγή

Οι πολλαπλές διεθνείς κρίσεις και τα σημαντικά γεωπολιτικά γεγονότα των τελευταίων ετών, όπως ο Ρωσικός Επιθετικός Πόλεμος, η σύγκρουση Χαμάς-Ισραήλ, ο στρατηγικός ανταγωνισμός μεταξύ ΗΠΑ και Κίνας και η στροφή κατά της παγκοσμιοποίησης, αλλά και η γεωπολιτική των αναδυόμενων τεχνολογιών όπως η τεχνητή νοημοσύνη, έχουν δημιουργήσει νέες συνθήκες ριζοσπαστικοποίησης και πόλωσης. Η προσπάθεια διαφόρων εξτρεμιστικών ομάδων, συμπεριλαμβανομένων δεξιών, αναρχικών, οικο-εξτρεμιστικών και γενικά αντικυβερνητικών ομάδων, να εκμεταλλευτούν παράπονα ή προσλαμβανόμενες αδικίες, όπως οι πρόσφατες διαμαρτυρίες αγροτών, είναι ένα άλλο παράδειγμα που πρέπει να λάβουμε υπόψη.

Σημαντικό μέρος του προβλήματος είναι η πολιτική νομιμοποίηση των εξτρεμιστικών αφηγημάτων, η επιλογή δηλαδή πολιτικών να αξιοποιούν όλο και περισσότερο ακροδεξιά και συνωμοσιολογικά αφηγήματα που υποστηρίζουν τμήματα του πληθυσμού τα τελευταία χρόνια. Το φλερτ τους με τη γλώσσα, τα σύμβολα και τα πολιτικά αφηγήματα που προέρχονται από ακραίες περιθωριακές ομάδες έχει ομαλοποιήσει και νομιμοποιήσει εξτρεμιστικά κινήματα όπως το QAnon και τη διεθνή νέα δεξιά.

Στον πλέον χαρακτηριστικό παράδειγμα, η κρίση της πανδημίας ανέδειξε τις πολλές συνδέσεις και αλληλεπιδράσεις που μπορούν να προκύψουν μεταξύ διαφορετικών μορφών ριζοσπαστικοποίησης, όπως τα τεχνοφοβικά και αντιεμβολιαστικά κινήματα εντός τόσο ακροδεξιών όσο και ακροαριστερών βίαιων οργανώσεων. Η πανδημία έφερε επίσης στο προσκήνιο μια από τις πρώτες σημαντικές επιστημονικές συζητήσεις γύρω από τη ριζοσπαστικοποίηση και τον ρόλο της ιδεολογίας και της αντίδρασης ως κρίσιμου παράγοντα. Όπως διαπιστώθηκε εμπειρικά, σε αρκετές χώρες σε όλη την ΕΕ, η πανδημία έθεσε την ιδεολογία σε δεύτερη μοίρα, οδηγώντας σε κινήματα μέτρων κατά των μέτρων προστασίας από την πανδημία που σε αρκετές περιπτώσεις έγιναν βίαια και στα οποία συμμετείχαν τόσο η ακροδεξιά όσο και η ακροαριστερά ή οι αναρχικοί, δημιουργώντας ένα σκληρό αντισυστημικό αντίδραση.

Η κοινή συνισταμένη σε αυτή την εξαιρετικά σύνθετη κατάσταση είναι η πόλωση ως αποτέλεσμα των κρίσεων και ο τρόπος με τον οποίο αυτή λειτουργεί ως υπόβαθρο του βίαιου εξτρεισμού. Το συγκεκριμένο κείμενο θα αναδείξει την πόλωση ως επίπτωση των κρίσεων και τη σύνδεση της με την ριζοσπαστικοποίηση που οδηγεί στον

βίαιο εξτρεμισμό μέσω της μελέτης δύο κρίσεων: α) της μεταναστευτικής/ προσφυγικής κρίσης του 2015- 2016 και β) της πανδημίας.

Το φαινόμενο της πόλωσης

Ο όρος της πόλωσης αναδύθηκε ως αυτόνομη ερευνητική θεματική σε μεγάλο βαθμό με τη μελέτη των Esteban και Ray (1994)¹. Οι συγγραφείς περιγράφουν το φαινόμενο κυρίως ως αποτέλεσμα των οικονομικών ανισοτήτων σε μια κοινωνία και διακρίνουν δύο δυναμικές οι οποίες λειτουργούν συμπληρωτικά: α) για να υπάρξει πόλωση θα πρέπει να υπάρχει μεγάλος βαθμός ομοιογένειας μέσα σε κάθε ομάδα, β) αυτή η ομοιογένεια εντός των ομάδων είναι που μειώνει την ανισότητα, ενώ από την άλλη αυξάνει την πόλωση². Επιπρόσθετα, υποστηρίζουν πως η δημιουργία πόλωσης προϋποθέτει μεγάλο βαθμό ετερογένειας μεταξύ των ανταγωνιστικών ομάδων, γεγονός που συμβαδίζει με τον δείκτη της ανισότητας. Τέλος τονίζουν πως για να υπάρξει πόλωση πρέπει ο αριθμός των αντίπαλων ομάδων να είναι μικρός και το μέγεθος τους μεγάλο.³

Οι ίδιοι μελετητές στα επόμενα χρόνια (σε συνεργασία με και με τους Gradin και Duclos) ανέδειξαν μια σειρά προϋποθέσεων/ χαρακτηριστικών για τη μέτρηση της πόλωσης:

1. Η πόλωση είναι ζήτημα που αφορά ομάδες ατόμων και όχι μοναχικούς δρώντες.
2. Μέσα σε δύο ή περισσότερες ομάδες η πόλωση προκύπτει όταν μειώνεται η διασπορά εντός της ομάδας, ενώ
3. η πόλωση αυξάνεται όταν η απόσταση μεταξύ των ανταγωνιστικών ομάδων εντείνεται⁴.

Με την αλλαγή πλεύσης της βιβλιογραφίας από την ταξική στην εθνική σύγκρουση, η μέτρηση της πόλωσης διανθίστηκε με επιπλέον δείκτες εκτός από αυτόν του εισοδήματος, όπως είναι η εθνική και πολιτισμική ετερογένεια, αλλά και το ζήτημα των πλειοψηφιών- μειοψηφιών⁵. Οι Duclos, Esteban και Ray (2004), εντοπίζουν πως η περίπτωση των εθνοτικών ομάδων είναι κατεξοχήν αυτή όπου «τα άτομα προσλαμβάνουν τον εαυτό τους μόνο μέσα από τη διχοτόμηση του Εμείς/Αυτοί», ενώ ο Ellingsen (2000) εξηγεί τις εμφύλιες συγκρούσεις μέσα από τις διάφορες παραμέτρους των πολύ-εθνοτικών κοινωνιών (το μέγεθος της μεγαλύτερης ομάδας, τον αριθμό των ομάδων, το μέγεθος της εθνοτικής μειοψηφίας και τις εθνοκεντρικές προτιμήσεις). Επιπλέον, μέσα από μελέτες για τις εθνοτικές μειονότητες στις χώρες της Ανατολικής Ευρώπης, προστέθηκαν οι έννοιες της ανασφάλειας, της απειλής και των κοινωνικών διαφορών, οι οποίες εξηγούν την πόλωση: η ανασφάλεια μπορεί να προσεγγιστεί τόσο από οικονομική όσο και από πολιτική σκοπιά και πολλές φορές σχετίζεται με την τάση αναζήτησης εξιλαστήριων θυμάτων στις εθνοτικές ή φυλετικές μειονότητες⁶.

Η κοινωνική πόλωση είναι η διεύρυνση των χάσμάτων μεταξύ των υποομάδων στο πλαίσιο ενός σαφώς προσδιορισμένου κοινωνικού χαρακτηριστικού. Αυτό σημαίνει πως «η κοινωνία πολώνεται όχι μόνο λόγω της οικονομικής ανισότητας μα εξαιτίας πολλών κοινωνικών παραγόντων», ενώ ο κίνδυνος της σύγκρουσης μεγεθύνεται όταν η κοινωνία είναι χωρισμένη σε δύο ισόποσες ομάδες με ανταγωνιστικούς στόχους⁷. Πέρα από τον άξονα ένδο-ομογενοποίησης/έξω-ετερογένειας, ο Collier (2001) συνδέει την έννοια της πόλωσης με αυτήν της κυριαρχικής ομάδας⁸.

Η Συνθήκη των Κρίσεων

Ο 21^{ος} μπορεί να χαρακτηριστεί και ως ο αιώνας των κρίσεων. Μέσα σε 24 χρόνια, ο κόσμος έχει γνωρίσει πολλές και διαφορετικές κρίσεις οι οποίες έχουν επηρεάσει ριζικά τόσο την καθημερινότητα των πολιτών, όσο και τις πολιτικές και τις στρατηγικές των κρατών. Το 2001 οι τρομοκρατικές επιθέσεις στις ΗΠΑ σηματοδότησαν μία αργόσυρτη κρίση ασφάλειας ως αποτέλεσμα της απειλής της τρομοκρατίας. Το 2007- 2008 ο κόσμος αντιμετώπισε τη διεθνή οικονομική κρίση, η οποία, ορισμένες χώρες, όπως η Ελλάδα, τις επηρέασε εντονότερα, δημιουργώντας μία δυναμική που απείλησε τη συνοχή της Ευρωζώνης, αλλά και της ίδιας της Ε.Ε. Το 2014 η υβριδική επίθεση της Ρωσίας στην Ουκρανία, που οδήγησε στην απόσχιση της Κριμαίας, δημιούργησε το έδαφος για μία παρατεταμένη κρίση ασφάλειας στην ανατολική γειτονιά της Ε.Ε. Το 2015- 2016 η Ένωση αντιμετώπισε τη μεγάλη προσφυγική- μεταναστευτική κρίση και παράλληλα τις απανωτές τρομοκρατικές επιθέσεις σε χώρες όπως η Γαλλία, το Βέλγιο, η Μεγάλη Βρετανία κ.ά. Το 2020 η πανδημία αποτέλεσε την μεγαλύτερη και πλέον περίπλοκη κρίση που αντιμετώπισε το σύνολο των χωρών, ενώ το 2022 η εισβολή της Ρωσίας στην Ουκρανία πέρα από μία τεράστια κρίση ασφάλειας σε ευρωπαϊκό επίπεδο με παγκόσμιες επιπτώσεις, προκάλεσε και επάλληλες κρίσεις σε

διαφορετικά επίπεδα με πλέον χαρακτηριστικές την ενεργειακή, ως αποτέλεσμα της εξάρτησης από τους ενεργειακούς πόρους της Ρωσίας, και την επισιτιστική. Η τελευταία χρονικά κρίση είναι ο πόλεμος στη Γάζα, με πάντα πιθανή την περίπτωση περαιτέρω κλιμάκωσης και μετατροπής σε περιφερειακή σύγκρουση, ενώ έχει και σημαντικές επιπτώσεις στην ισλαμιστική ριζοσπαστικοποίηση και τρομοκρατία.

Πέραν όμως των παγκόσμιων ή περιφερειακών/ ευρωπαϊκών κρίσεων, οι χώρες αντιμετώπισαν και κρίσεις σε εθνικό επίπεδο ή βίωσαν εντονότερα κάποιες από τις κρίσεις ευρείας κλίμακας. Η Γαλλία για παράδειγμα είναι η χώρα που η απειλή της τρομοκρατίας οδήγησε σε μία παρατεταμένη κρίση ασφάλειας με μικρά ή μεγαλύτερα ξεσπάσματα. Η Ελλάδα αντιμετώπισε μία μεγάλη κρίση τον Φεβρουάριο- Μάρτιο του 2020, στα χερσαία σύνορά της στον Έβρο, ως αποτέλεσμα της προσπάθειας της Τουρκίας, να εργαλειοποιήσει χιλιάδες παράτυπους μετανάστες και να προσπαθήσει να τους προωθήσει μαζικά στην Ελλάδα.

Αν θεωρήσουμε τις επιθέσεις της 11^{ης} Σεπτεμβρίου ως το σημείο έναρξης του κύκλου των κρίσεων που αντιμετωπίζει ο κόσμος μας και τον πόλεμο στη Γάζα ως την τελευταία χρονικά μεγάλη κρίση που αντιμετωπίζουμε μπορούμε να μιλήσουμε για ένα καθεστώς παρατεταμένης κρίσης. Αυτή η αίσθηση είναι εντονότερη ειδικότερα στο δεύτερο μισό του 21^{ου} αιώνα, μετά και την παγκόσμια οικονομική κρίση και κυρίως τα τελευταία οκτώ με εννέα χρόνια που έχουμε την εμφάνιση και την κλιμάκωση των επάλληλων κρίσεων. Σε αυτό το πλαίσιο μπορούμε να ορίσουμε αυτή την περίοδο ως μία μόνιμη κρίση (permacrisis), όπου η κρίση αναδύεται ως η νέα κανονικότητα που θα πρέπει τα κράτη και οι διεθνείς θεσμοί να διαχειριστούν και οι κοινωνίες να προσαρμοστούν σε αυτή.

Πρέπει εδώ να παρατηρήσουμε πως σε ορισμένες περιπτώσεις οι χώρες βρέθηκαν να αντιμετωπίζουν περισσότερες από μία κρίσεις παράλληλα. Το 2015- 2016 οι χώρες της Ε.Ε. την μεταναστευτική- προσφυγική κρίση και τις τρομοκρατικές επιθέσεις, η Ελλάδα το 2020 αντιμετώπισε την κρίση στον Έβρο, την πρώτη φάση της πανδημίας, αλλά και μικρότερης έκτασης κρίσεις, όπως ήταν το κάψιμο της δομής hot- spot στη Μόρια τον Σεπτέμβριο του 2020. Οι περισσότερες χώρες βρέθηκαν αντιμέτωπες με τον πόλεμο της Ουκρανίας, ενώ ακόμη διαχειρίζονταν την τελευταία φάση και τις μεσοπρόθεσμες επιπτώσεις της πανδημίας.

Ουσιαστικά, είναι η περίοδος των πολύ- κρίσεων (poly- crises). Περισσότερες από μία κρίσεις, με διαφορετικά χαρακτηριστικά και σφοδρότητα που ξεσπούν την ίδια περίοδο ή όταν μία ή περισσότερες κρίσεις βρίσκονται σε φάση εξέλιξης ή κλιμάκωσης. Σε ορισμένες περιπτώσεις, κάποιες από τις κρίσεις τροφοδότησαν ή λειτούργησαν ώστε να αναπτυχθούν ή κλιμακωθούν και οι άλλες, σε μία λογική αλληλοτροφοδοτούμενων διαδικασιών. Για παράδειγμα το 2015- 2016 η μεταναστευτική- προσφυγική κρίση και οι απανωτές τρομοκρατικές επιθέσεις λειτούργησαν αλληλοτροφοδοτικά, καθώς πολλοί Ευρωπαίοι, συνέδεσαν ευθέως την μετανάστευση με τις ισλαμιστικές τρομοκρατικές οργανώσεις και επιθέσεις, ενώ στην πραγματικότητα, η απειλή της παρείσφρησης τρομοκρατών στις μικτές μεταναστευτικές ομάδες ήταν μεν υπαρκτή, αλλά σε καμία περίπτωση δεν είχε την έκταση που κυριάρχησε ως αίσθηση. Εκ των πραγμάτων, οι πολύ- κρίσεις είναι περισσότερο επικίνδυνες, καθώς από τη μία πλευρά ασκούν μεγαλύτερη πίεση στους μηχανισμούς διαχείρισης των κρατών και από την άλλη διευρύνουν την ευαλωτότητα κοινωνιών, ομάδων και ατόμων.

Ήδη αναφέραμε τις τρομοκρατικές επιθέσεις, οι οποίες δεν πληρούν πάντα τα χαρακτηριστικά μίας κρίσης, μπορούν όμως να εξελιχθούν σε κρίση, όπως στην περίπτωση των επιθέσεων της 11^{ης} Σεπτεμβρίου ή της 13^{ης} Νοεμβρίου 2015 στο Παρίσι. Στην ίδια κατηγορία ανήκουν και άλλα έκτακτα περιστατικά που μπορούν να κλιμακωθούν σε κρίσεις. Η μεγαλύτερη και σημαντικότερη κατηγορία περιστατικών που μπορούν να εξελιχθούν σε κρίσεις είναι οι καταστροφές και κυρίως οι φυσικές ή σε περιπτώσεις, όπως το δυστύχημα στα Τέμπη, προβληματικές διαδικασίες ή ελλείμματα σε υποδομές, που μπορούν να προκαλέσουν ατυχήματα και δυστυχήματα. Τα καλοκαίρια του 2021 και του 2023 οι πολλές, παράλληλες δασικές πυρκαγιές που αντιμετώπισε η Ελλάδα, με ορισμένες, όπως οι mega- πυρκαγιές στην Εύβοια και στην Αλεξανδρούπολη να καίνε για περισσότερο από τη μία εβδομάδα, δημιούργησαν ένα σκηνικό κρίσης. Η χειρότερη εκδοχή ήταν βέβαια η πυρκαγιά στο Μάτι, που στοίχησε τη ζωή σε 103 ανθρώπους. Αξίζει να σημειωθεί πως οι ΗΠΑ αντιμετωπίζουν τις δασικές πυρκαγιές και κυρίως τις mega- πυρκαγιές ως κατάσταση κρίσης, για αυτό έχουν υιοθετήσει από το 2022 την ειδική στρατηγική “Confronting the Wild fires Crisis Strategy”⁹.

Ένας ακόμη σημαντικός διαχωρισμός που πρέπει να γίνει είναι αυτός ανάμεσα σε κρίσεις ασφάλειας, όπως είναι οι τρομοκρατικές επιθέσεις ή ο πόλεμος στην Ουκρανία, ακόμη και οι καταστροφές, και σε κρίσεις που μπορούν να

έχουν σημαντικές επιπτώσεις στον τομέα της ασφάλειας. Στη δεύτερη περίπτωση εντάσσουμε την πανδημία, η οποία είχε σημαντικές επιπτώσεις σε διάφορα

επίπεδα ασφάλειας (εσωτερική, εθνική, περιφερειακή, παγκόσμια), αλλά και η μεταναστευτική-προσφυγική κρίση, η οποία είχε και βραχυπρόθεσμες, αλλά και μεσοπρόθεσμες επιπτώσεις ασφάλειας. Είτε λοιπόν μιλάμε για κρίσεις ασφάλειας, είτε για κρίσεις που έχουν και επιπτώσεις ασφάλειας, οι φορείς και οι υπηρεσίες που είναι επιφορτισμένες με τον σχεδιασμό και την υλοποίηση της πολιτικής ασφάλειας, αποτελούν συστατικό μέρος του μηχανισμού διαχείρισης κρίσεων των κρατών. Αυτό στην πράξη σημαίνει πως μεγάλο μέρος του καθημερινού έργου συνιστά επί της ουσίας διαχείριση κρίσεων σε μικρό, μέσο και μεγάλο επίπεδο. Επίσης, η έννοια και η αναγκαιότητα της ανθεκτικότητας των κοινωνιών, αλλά και του κρατικού μηχανισμού έναντι των κρίσεων επεκτάθηκε και στο πεδίο της ασφάλειας.

Οι Πολωμένες Κοινωνίες

Τα τελευταία χρόνια βιώνουμε μία περίοδο σημαντικών και μεγάλων αλλαγών σε πολλά επίπεδα. Από τους διεθνείς οργανισμούς και τη λειτουργία των κρατών, μέχρι την ενημέρωση, την επικοινωνία και την καθημερινότητά των πολιτών που επηρεάζεται από δύο βασικές δυναμικές: α) την εξέλιξη της τεχνολογίας και β) τη διασπορά των μέσων επικοινωνίας και δικτύωσης. Παράλληλα, όμως, ζούμε σε έναν κόσμο μεγάλων ανισοτήτων. Η διαδικασία της παγκοσμιοποίησης, με τις αδυναμίες στο ρυθμιστικό της πλαίσιο, δημιούργησε νέους χαμένους, που βιώνουν εντονότερα την απειλή του κοινωνικού αποκλεισμού. Ο αποκλεισμός, σε αρκετές περιπτώσεις συμβαδίζει με κλειστές κοινότητες και κοινωνίες (μετανάστες, Ρομά κ.ά.) όπου το ζήτημα των ανισοτήτων είναι υπαρκτικό και η ευαλωτότητα ιδιαίτερος μεγάλη.

Οι παγκόσμιες προκλήσεις, αλλά και οι κρίσεις σε διαφορετικά επίπεδα (οικονομία, πολιτική, ασφάλεια, μετανάστευση, κουλτούρα), όπως παρουσιάστηκε και προηγουμένως, έχουν δημιουργήσει μια ευρεία αίσθηση δημοκρατικού ελλείμματος και δύο επάλληλες διαδικασίες αμφισβήτησης που οδηγούν σε κρίση: α) εμπιστοσύνης και β) αντιπροσώπευσης. Τα παγκόσμια προβλήματα δεν βρίσκουν λύση σε παγκόσμιο επίπεδο, καθώς το σχήμα της υπερεθνικής διακυβέρνησης δεν έχει προχωρήσει στο βαθμό που είναι απαραίτητο, ενώ τα κράτη δεν μπορούν να δώσουν απαντήσεις μεμονωμένα. Αυτή η κατάσταση δημιουργεί ένα διττό σχήμα απογοήτευσης, αλλά και οργής για τους πολίτες διαφόρων κρατών. Αυτή την αίσθηση παραπόνων εκμεταλλεύονται διάφορες λαϊκίστικές και αυταρχικές δυνάμεις και ηγέτες που επί της ουσίας υποσκάπτουν τη δημοκρατία, εργαλειοποιώντας τις δημοκρατικές διαδικασίες εκ των έσω (π.χ. συμμετέχοντας στις εκλογές, ενώ παράλληλα προσπαθούν να υποβαθμίσουν την κοινοβουλευτική διαδικασία).

Η πανδημία λειτούργησε ως ένας καταλύτης που επιτάχυνε τις αλλαγές, δημιουργώντας συνθήκες κρίσης σε πολλά επίπεδα. Αρκετοί πολίτες ένωσαν πως οι προσπάθειες των Κυβερνήσεων να διαχειριστούν την πρώτη φάση της πανδημίας με σκληρά μέτρα κοινωνικής αποστασιοποίησης δημιούργησε μία νέα συνθήκη επιβολής και καταστολής δικαιωμάτων. Η αγωνία για την ισορροπία ελευθερίας και ασφάλειας εργαλειοποιήθηκε από εξτρεμιστικές ομάδες όλου του φάσματος, οι οποίες προωθούσαν το αφήγημα μιας «Κοινωνίας της Επιτήρησης».

Οι συνθήκες αυτές αποτυπώνουν με τον πλέον γλαφυρό τρόπο τις κοινωνίες διακινδύνευσης στις οποίες ζούμε. Οι διευρυμένοι κίνδυνοι και απειλές έχουν μεταβάλει την ίδια την έννοια της ασφάλειας και ως εκ τούτου και τις πολιτικές ασφάλειας. Μέσα σε ένα γενικότερο πλαίσιο κρίσης εμπιστοσύνης και σύγκρουσης ταυτοτήτων τα ζητήματα ασφάλειας αντί να ενώνουν, διχάζουν. Η ασφάλεια εκ των πραγμάτων βρίσκεται στο επίκεντρο των πολωμένων κοινωνιών του σήμερα.

Είναι χαρακτηριστικό το παράδειγμα της Ελλάδας. Από το 2008, με ελάχιστες εξαιρέσεις, η Ελλάδα αποτελεί παράδειγμα πολωμένης κοινωνίας. Μία κοινωνία μπορεί να χαρακτηριστεί πολωμένη όταν κυριαρχούν δύο μεγάλοι και ανταγωνιστικοί πόλοι. Ας δούμε όλα τα αντιθετικά σχήματα των τελευταίων ετών. Μνημόνιο- Αντι-μνημόνιο, Ναι/Όχι στο δημοψήφισμα (αντιπαράθεση για τη θέση της χώρας στην Ευρώπη), Ναι/ Όχι στη Συμφωνία των Πρεσβών, Υπέρ και Κατά των Εμβολίων. Χωρίς να μπορούμε σε ορθολογική ανάλυση για τα επιχειρήματα και τη θέση της μίας ή της άλλης πλευράς, αυτό που παρατηρούμε, από τη σκοπιά των πολωμένων κοινωνιών, είναι οι διχοτομίες, η πόλωση και οι εντάσεις που αυτή προκαλεί.

Δεν είναι όμως μόνο η Ελλάδα. Οι ΗΠΑ αντιμετωπίζουν μία εκτεταμένη κρίση δημοκρατίας, με μεγάλες ανισότητες και βαθιές διχοτομίες. Το κίνημα Black Lives Matter αποτύπωσε αυτή τη δυναμική της αντιπαράθεσης και τελικά της σύγκρουσης ταυτοτήτων. Η εισβολή στο Καπιτώλιο ήταν το σημείο μηδέν για τη μεγαλύτερη δημοκρατία της Δύσης, δεν είναι άλλωστε τυχαίο πως ο πρώην και από τον Ιανουάριο του 2025 νυν Πρόεδρος Ντόναλντ Τράμπ κατηγορήθηκε για υποκίνηση εξέγερσης και για πρόκληση βίας. Η σημαντικότερη όμως απειλή για τις ΗΠΑ πηγάζει μέσα από το θολό τοπίο των διαφόρων ριζοσπαστικοποιημένων ομάδων και ατόμων που πιστεύουν σε θεωρίες συνωμοσίας, με αποτέλεσμα τις διάφορες δολοφονικές επιθέσεις ανθρώπων που υποστηρίζουν την QAnon ή την «Μεγάλη Αντικατάσταση». Ένας θολός αντισυστημισμός, που χαρακτηρίζει τη βία στην μεταπανδημική εποχή.

Όπως είναι αναμενόμενο σε ένα τόσο έντονο διχαστικό σκηνικό η ασφάλεια επηρεάζεται σημαντικά. Τα προβλήματα ξεκινούν από την εργαλειοποίηση των πολιτικών ασφάλειας μέσα σε ένα πλαίσιο έντονου πολιτικού, αλλά και κομματικού ανταγωνισμού. Οι πολιτικές αστυνόμευσης προσεγγίζονται με όρους άσπρου-μαύρου και σε ένα πλαίσιο αντιπαράθεσης που δεν αφήνει χώρο σε συναίνεση. Δεν είναι τυχαίο πως οι περισσότερες Κυβερνήσεις διεθνώς κατηγορήθηκαν για αύξηση της καταστολής κατά την περίοδο την πανδημίας.

Το δεύτερο και σημαντικό στοιχείο είναι η υποχώρηση του αισθήματος εμπιστοσύνης προς τους θεσμούς που είναι επιφορτισμένοι με την επιβολή του νόμου και κυρίως προς τις αστυνομίες. Αυτή η κατάσταση δημιουργεί ρωγμές στο Κοινωνικό Συμβόλαιο, αλλά και αμφισβήτηση στο πρωτείο άσκησης νόμιμης βίας που έχουν οι αστυνομίες. Η σχέση αστυνομίας-πολιτών, γίνεται δυσκολότερη και η αντίδραση έχει μετατραπεί σε κυρίαρχο χαρακτηριστικό.

Η παρατεταμένη πόλωση έχει οδηγήσει στη ριζοσπαστικοποίηση μεγάλου αριθμού πολιτών, χωρίς απαραίτητα αυτή να έχει προκύψει από την υποστήριξη μίας συγκεκριμένης ιδεολογίας. Αντίθετα, το βασικό ενοποιητικό στοιχείο είναι ο αντικυβερνητισμός και αντιελιτισμός που διαπερνά ιδεολογίες και πολιτικές πεποιθήσεις. Σε αυτό το πλαίσιο η αστυνομία στοχοποιείται ως ο φορέας που εκφράζει την επιβολή κυβερνητικών και εξουσιαστικών πολιτικών. Η συμμετοχή σε διαδηλώσεις στο δρόμο, ιδιαίτερα κατά την πρώτη περίοδο της πανδημίας, οδήγησε σε αντιπαραθέσεις και σε βίαια επεισόδια με την αστυνομία σε πολλές χώρες. Οι καθημερινές συγκρουσιακές εμπλοκές αυξάνουν τη χρήση βίας.

Ειδική περίπτωση αποτελούν οι κλειστές κοινότητες και κοινωνίες. Σε αρκετές περιπτώσεις από αυτές τις ομάδες πληθυσμού βλέπουμε βίαιες ή και εγκληματικές συμπεριφορές. Η σχέση αυτών των κοινοτήτων με το κράτος γενικότερα, αλλά και την αστυνομία ειδικότερα, είναι εξόχως προβληματική, ενώ σε αρκετές περιπτώσεις βλέπουμε πολιτικές υπερ-αστυνόμευσης, που μπορεί να οδηγήσει σε ευμενώς διακριτική αντιμετώπιση ή, αντίθετα, υπό-αστυνόμευσης που μπορεί να οδηγήσει στην εντατικοποίηση της ανομίας και της παραβατικής συμπεριφοράς. Είναι χαρακτηριστικό πως ακόμη και μοντέλα όπως αυτό της Κοινοτικής Αστυνόμευσης στη Μεγάλη Βρετανία αγγίζουν τα όριά τους.

Η Παράμετρος του Κυβερνοχώρου

Είναι κρίσιμο το γεγονός πως το διαδίκτυο έχει καταστεί βασικό μέσο προώθησης της βίας, αλλά και του διχαστικού και μισαλλόδοξου λόγου. Μέσα από τις συγκρουόμενες ταυτότητες έχει αναδειχθεί ένας μισαλλόδοξος διαδικτυακός ακτιβισμός που σε αρκετές περιπτώσεις στηρίζεται στην παραπληροφόρηση και σε ψευδείς ειδήσεις και αλληλοεπιδρά με την διαδικτυακή προπαγάνδα των εξτρεμιστικών οργανώσεων. Σε αυτή τη διαδικασία η διεκδίκηση δικαιωμάτων έχει μετατραπεί σε έναν τυφλό αντισυστημισμό που φλερτάρει με τον βίαιο και ακραία πολωτικό λόγο, τροφοδοτώντας τα επεισόδια των βίαιων κινηματικών δρώντων.

Η στροφή από τα παραδοσιακά κανάλια επικοινωνίας στα μέσα κοινωνικής δικτύωσης δεν βελτίωσε απαραίτητα την ποιότητα του πολιτικού λόγου. Αντίθετα, τα μέσα κοινωνικής δικτύωσης είναι γνωστό ότι λειτουργούν ως echo chambers της πόλωσης και προωθούν τη ρητορική «Εμείς εναντίον των Άλλων». Αυτοί οι παράγοντες συσχετίζονται με τον διαδικτυακό εκφοβισμό, την παρενόχληση και, ειδικότερα, τη ρητορική μίσους.

Η παραπληροφόρηση, η διασπορά ψευδών ειδήσεων και η διάχυση θεωριών συνωμοσίας συνιστούν απειλή για τη δημοκρατία και έχουν προκαλέσει σημαντικά προβλήματα σε εκλογικές διαδικασίες και τροφοδοτούν την πόλωση. Ο διχαστικός και ο μισαλλόδοξος λόγος έχουν τροφοδοτήσει πολλές φορές ρατσιστική βία και εγκλήματα.

Το Διαδίκτυο χρησιμοποιείται από τις τρομοκρατικές οργανώσεις για να ριζοσπαστικοποιήσουν, στρατολογήσουν, διαδώσουν προπαγάνδα, ακόμη και για να προετοιμάσουν και να εκτελέσουν επιθέσεις. Εξίσου σημαντική είναι και η χρήση του Διαδικτύου για εγκληματικές δραστηριότητες. Η ελευθερία του λόγου μπορεί να επιτρέψει και τη διάχυση εγχειριδίων με απλές συμβουλές τρομοκρατικών επιθέσεων; Κάτι τέτοιο είχε κάνει η Daesh το 2016 μέσω του Twitter.

Η Μεταναστευτική/ Προσφυγική Κρίση

Οι μεταναστευτικές πιέσεις που το 2015 εξελίχθηκαν στην μεγαλύτερη προσφυγική κρίση των τελευταίων ετών, αλλά και οι τρομοκρατικές επιθέσεις και σε ορισμένες περιπτώσεις η προβληματική και απλουστευτική σύνδεση του προσφυγικού με την τρομοκρατία είναι τα βασικά γεγονότα- καταλύτες που διαμόρφωσαν τις συνθήκες ασφάλειας στην Ε.Ε. τα τελευταία χρόνια. Ειδικότερα, προκάλεσαν δύο σημαντικές επιπτώσεις: α) την επιστροφή των εθνικών προσλήψεων και απαντήσεων και β) την πόλωση των κοινωνιών¹⁰.

Τα σύνορα και η σύνδεση με την κρατική κυριαρχία είναι ο βασικός τρόπος με τον οποίο προσλαμβάνουν τα ευρωπαϊκά κράτη τις επιπτώσεις ασφάλειας της μετανάστευσης σήμερα¹¹. Τα σύνορα, που είναι η πιο παραδοσιακή διαχωριστική γραμμή της ανθρώπινης ιστορίας, η αγωνιώδης προσπάθεια των ανθρώπων που στις περισσότερες περιπτώσεις αναγκάστηκαν να εγκαταλείψουν τα σπίτια και την πατρίδα τους για να αναζητήσουν μία νέα ζωή, αλλά και ο φόβος για το διαφορετικό, η αλλαγή στην καθημερινότητα των χωρών υποδοχής και η αίσθηση απειλής για την ταυτότητα με όρους θρησκείας, πολιτισμού και γλώσσας, συνθέτουν ένα δύσκολο και πολύπλοκο πολιτικό και κοινωνικό ζήτημα.

Δύο γεγονότα που σχετίζονται με την ασφάλεια είναι αυτά που απελευθέρωσαν τις δυναμικές της πόλωσης γύρω από το ζήτημα της μετανάστευσης. Το πρώτο είναι η προβληματική σύνδεση των μικτών κινήσεων με την τρομοκρατία με αφορμή τις επιθέσεις στο Παρίσι το Νοέμβριο του 2015¹² και το δεύτερο είναι οι σεξουαλικές επιθέσεις ανήμερα της Πρωτοχρονιάς του 2016 στην Κολωνία οι οποίες αποδόθηκαν σε πρόσφυγες. Με αφορμή αυτά τα περιστατικά παρατηρήθηκε σε όλες σχεδόν τις ευρωπαϊκές χώρες μία παρατεταμένη πολιτική και κοινωνική πόλωση που σε ορισμένες περιπτώσεις οδήγησε σε επεισόδια, συγκρούσεις, ακόμη και στη χρήση βίας.

Η κοινή συνισταμένη και στα δύο ζητήματα είναι η σύνδεση των τρομοκρατικών επιθέσεων και των διογκωμένων μεταναστευτικών κινήσεων με τις πολιτικές ενσωμάτωσης και πολυπολιτισμικότητας και ιδιαίτερα με τη διάσταση της θρησκείας και της ανεκτικότητας ως προς το Ισλάμ. Η αίσθηση της απειλής της ταυτότητας και ο φόβος για το «Άλλο» επιδεινώθηκε ριζικά από την ισλαμιστική τρομοκρατία, η οποία οδήγησε ακόμη και σε ταυτολογικές προσεγγίσεις του Ισλάμ ως «τρομοκρατική» θρησκεία.

Σε επίπεδο πολιτικής, ενισχυθήκαν οι λαϊκίστικοί, οι εθνικιστικοί και οι ακροδεξιοί σχηματισμοί, ενώ κυριάρχησε και μία σκληρή και σε μεγάλο βαθμό αντί-μεταναστευτική ρητορική στο δημόσιο διάλογο. Ωστόσο, αυτή η πολιτική αντίδραση και ρητορική δεν περιορίστηκε μόνο στους ακραίους πολιτικούς χώρους, καθώς και παραδοσιακοί πολιτικοί σχηματισμοί υιοθέτησαν μία σκληρή ρητορική και οδηγήθηκαν στην εφαρμογή πολιτικών αποτροπής των μεταναστών, ακόμη και αν αυτές έρχονταν σε αντιδιαστολή με το ευρωπαϊκό κεκτημένο¹³.

Μέσα σε αυτό το πολωμένο κλίμα υπήρξε ένταση του ακροδεξιού εξτρεισμού με τη στοχοποίηση μεταναστών και προσφύγων, τις μηχανοκίνητες περιπολίες και τις βίαιες συγκεντρώσεις και διαδηλώσεις που καταλήγουν σε συγκρούσεις με ακροαριστερές και αναρχικές ομάδες, αλλά και με την αστυνομία, όπως στο Βέλγιο και στη Γερμανία. Ωστόσο, οι εντάσεις, οι συγκρούσεις και η χρήση βίας δεν περιορίστηκαν μόνο εκεί. Επεισόδια σημειώθηκαν μεταξύ κατοίκων και μεταναστευτικών- προσφυγικών πληθυσμών, αλλά και κατοίκων και Σωμάτων Ασφαλείας. Τέλος, πορείες και βίαιες συγκρούσεις μεταξύ μεταναστών και προσφύγων, αλλά και επιθέσεις εναντίον του προσωπικού των Σωμάτων Ασφαλείας συνθέτουν το μωσαϊκό της κλιμάκωσης της βίας.

Μία άλλη διάσταση αφορά τη σύνδεση της φιλοξενίας και της διαμονής προσφύγων σε μία χώρα με το ενδεχόμενο ριζοσπαστικοποίησης τους και καταφυγής τους στην ένοπλη βία, μία προσέγγιση που τυγχάνει ανάπτυξης τα τελευταία χρόνια. Οι περισσότερες μελέτες δίνουν έμφαση στην ανάλυση δύο ειδών περιπτώσεων: α) ριζοσπαστικοποίηση και δημιουργία ένοπλων ομάδων εντός των κέντρων υποδοχής και διαμονής προσφύγων και β) ένοπλες ομάδες που αναγκάστηκαν να αποχωρήσουν από τα πεδία των μαχών και να βρεθούν σε κέντρα υποδοχής και διαμονής προσφύγων. Τα τελευταία χρόνια αναπτύσσεται δυναμικά και μία τρίτη περιπτώσιολογική

μελέτη, αυτή της ριζοσπαστικοποίησης και της στρατολόγησης προσφύγων από τρομοκρατικές οργανώσεις που διεισδύουν στα κέντρα υποδοχής και διαμονής προσφύγων¹⁴. Πρέπει ωστόσο να τονιστεί πως από τη βιβλιογραφία δεν προκύπτει μία ευθεία γραμμή συνολικής σύνδεσης των προσφύγων με τη ριζοσπαστικοποίηση, την στρατολόγηση και την καταφυγή στη βία, καθώς υπάρχουν και αρκετά παραδείγματα φιλοξενίας προσφύγων σε χώρες χωρίς να προκύψει ριζοσπαστικοποίηση και βία.

Η τρίτη διάσταση του εξτρεισμού ως αποτέλεσμα της πόλωσης γύρω από το μεταναστευτικό αφορά την λεγόμενη και «αμοιβαία» ριζοσπαστικοποίηση ανάμεσα σε ακραίους Ισλαμιστές και ακροδεξιούς που μπορεί να οδηγήσει στο βίαιο εξτρεισμό και από τις δύο πλευρές¹⁵. Εντός αυτού του πλαισίου υπάρχει όξυνση των φοβικών αισθημάτων για τους μουσουλμάνους μετανάστες και της Ισλαμοφοβίας και αναπτύσσεται μία ακόμη δυναμική περιθωριοποίησης τους. Αυτή τη δυναμική θέλουν να εκμεταλλευτούν και οι τζιχαντιστές τρομοκράτες για να μπορέσουν να ριζοσπαστικοποιήσουν και να στρατολογήσουν νέους μαχητές. Κρίσιμη παράμετρος σε αυτό το ζήτημα είναι η επιστροφή των ευρωπαίων αλλοδαπών μαχητών από τη Μέση Ανατολή και τη Βόρεια Αφρική. Ωστόσο, δεν πρέπει να παραβλέπουμε και τον ανταγωνισμό και την σύγκρουση ακροδεξιών με αναρχικών και ακροαριστερών εξτρεμιστών γύρω από το μεταναστευτικό ζήτημα¹⁶.

Μία από τις πιο επικίνδυνες επιπτώσεις των τρομοκρατικών επιθέσεων, είναι ξεκάθαρα η ενίσχυση των ακροδεξιών και των εθνικιστικών πολιτικών φωνών. Σε πολιτικό επίπεδο οι τζιχαντιστές ευνοούν την ακροδεξιά και αυτή την παράμετρο πρέπει να τη λάβουμε σοβαρά υπόψη μας αν θέλουμε να έχουμε τη συνολική εικόνα των προκλήσεων για την Ευρώπη από την ισλαμιστική τρομοκρατία.

Το φυσικό επακόλουθο της αποδυνάμωσης των παραδοσιακών κομμάτων είναι η ενδυνάμωση των λαϊκιστικών και αντισυστημικών πολιτικών σχηματισμών, μία τάση που στη Γαλλία έχει πάρει τη μορφή της σταδιακής και σταθερής ανόδου του Εθνικού Μετώπου, ειδικά μετά την ανάληψη της ηγεσίας από την Μαρίν Λεπέν- την κόρη του ιδρυτή. Η ευκολία με την οποία τα λαϊκιστικά και αντισυστημικά κόμματα- ανεξαρτήτως ιδεολογικής εκκίνησης- εκφέρουν έναν πολιτικό λόγο απλουστευμένο, βασισμένο σε θεωρίες συνωμοσίας και καλλιεργώντας τα εθνικιστικά ένστικτα, ο οποίος καταναλώνεται με μία ηδονιστική διαδικασία από το λαό- τον οποίο σπεύδουν πάντα να ανάγουν σε επιούσιο και να τον χαϊδεύουν με κάθε δυνατό τρόπο, επηρεάζει σε σημαντικό βαθμό τον πολιτικό διάλογο. Η μεγαλύτερη επιτυχία των εθνολαϊκιστικών σχηματισμών είναι η επιβολή της δικής τους agenda, είναι το στρατηγικό τους όπλο για να μπορέσουν να βγάλουν τα παραδοσιακά κόμματα από την κανονικότητα της διακυβέρνησης και της διαχείρισης.

Η Κρίση της Πανδημίας

Το βασικό υπόστρωμα για να αναπτυχθούν οι δυναμικές της πολιτικής βίας είναι η πόλωση των κοινωνιών. Η πανδημία, όπως είδαμε σε πολλές χώρες της Ε.Ε., αλλά και στις ΗΠΑ, λειτούργησε ως καταλύτης και επηρέασε τη ριζοσπαστικοποίηση, αλλά και τον τρόπο δραστηριοποίησης των εξτρεμιστικών ομάδων. Κινήματα διαμαρτυρίας ενισχύθηκαν, ενώ δημιουργήθηκαν και νέα. Σε αρκετές περιπτώσεις, ομάδες πολιτών ανέπτυξαν μία αντιδραστική προς το κράτος ταυτότητα, με αποτέλεσμα η πόλωση να ενταθεί και να υπάρξουν ακόμη και βίαια ξεσπάσματα.

Η κρίση της πανδημίας ήταν αυτή που ανέδειξε και τις πολλές συνδέσεις και αλληλεπιδράσεις που μπορούν να προκύψουν μεταξύ διαφορετικών μορφών ριζοσπαστικοποίησης, όπως τα τεchnοφοβικά και αντεμβολιαστικά κινήματα τόσο με ακροδεξιές, όσο και με ακροαριστερές βίαιες οργανώσεις. Η πανδημία επίσης έφερε στο προσκήνιο μία από τις πρώτες μεγάλες συζητήσεις που υπήρχαν σε επιστημονικό επίπεδο γύρω από την ριζοσπαστικοποίηση και αφορά το ρόλο της ιδεολογίας και της αντίδρασης ως κρίσιμο παράγοντα. Η γνωσιακή (Cognitive) ριζοσπαστικοποίηση αναδεικνύει ως βασικό παράγοντα επιρροής την ιδεολογία, την θρησκεία ή κάποιο πιστεύω μεγάλου φάσματος που μπορεί να οδηγήσει τους ανθρώπους στο μονοπάτι της βίας. Αντίθετα, η συμπεριφορική (Behavioral) ριζοσπαστικοποίηση δίνει έμφαση στα ζητήματα που επηρεάζουν τη συμπεριφορά και εδώ κύριο ρόλο διαδραματίζουν το παράπονο, η οργή και η αντίδραση έναντι μίας πρωτοβουλίας ή μίας πολιτικής, αλλά και ζητήματα όπως η αναζήτηση ταυτότητας ή γενικότερα του ανήκειν. Σε αρκετές χώρες η πανδημία οδήγησε την ιδεολογία σε δεύτερη μοίρα και είδαμε κινήματα κατά της πανδημίας, τα οποία σε αρκετές περιπτώσεις έγιναν βίαια, και στα οποία συμμετείχαν τόσο ακροδεξιοί, όσο και ακροαριστεροί ή και αναρχικοί, δημιουργώντας ένα σκηνικό αντισυστημικής αντίδρασης. Αυτή η μορφή ριζοσπαστικοποίησης είναι ιδιαίτερα γνωστή και διαδεδομένη στην Ελλάδα. Την συναντήσαμε και κατά τη διάρκεια της πανδημίας, όπου την κρίση και τα περιοριστικά μέτρα εκμεταλλεύτηκαν τόσο ακροδεξιές, όσο και κυρίως αναρχικές οργανώσεις, αλλά κυρίως

κατά την περίοδο της μεγάλης έξαρσης της μαζικής αντισυστημικής βίας. Η περίοδος του Αντιμνημονίου και των Αγανακτισμένων αποτελεί την επιτομή της αντισυστημικής βίας που σχετικοποιεί τις ιδεολογίες (Πάνω και Κάτω Πλατεία). Παρά λοιπόν την σχετική συζήτηση, που γίνεται και σε επίπεδο Ε.Ε., για το αν βρισκόμαστε στην εποχή που δεν επηρεάζουν οι ιδεολογίες, η πραγματικότητα είναι πως η ιδεολογία και η θρησκεία παραμένουν σημαντικές παράμετροι και ιδιαίτερα η στρέβλωση της δεύτερης αποτελεί συστατικό στοιχείο προπαγάνδας και στρατολόγησης.

Για πολλά χρόνια η συζήτηση περί ριζοσπαστικοποίησης έδινε έμφαση στα μέρη που εξελισσόταν αυτή. Τζαμιά και πολιτιστικά κέντρα στην ισλαμιστική ριζοσπαστικοποίηση, σχολές πολεμικών τεχνών, γυμναστήρια και μέταλ σκηνή για την ακροδεξιά, καταλήψεις, φυλακές, πανεπιστήμια για την ακροαριστερή και αναρχική. Από το 2010 όμως και σταδιακά, ιδιαίτερα από τη στιγμή που τα Μέσα Κοινωνικής Δικτύωσης και οι κρυπτογραφημένες πλατφόρμες επικοινωνίας κυριάρχησαν και έφεραν μία πραγματική επανάσταση στην καθημερινή επικοινωνία των ανθρώπων, άλλαξε δραστικά και το περιβάλλον που εξελίσσεται η ριζοσπαστικοποίηση, με την διαδικτυακή διάσταση να είναι κυρίαρχη. Η Daesh για παράδειγμα ήταν αυτή που έφερε την ισλαμιστική ριζοσπαστικοποίηση στην εποχή της 4^{ης} Βιομηχανικής Επανάστασης, εξελίσσοντας απίστευτα την διάδοση της προπαγάνδας, την στρατολόγηση και την κινητοποίηση στο διαδίκτυο. Στις περισσότερες ευρωπαϊκές χώρες, αλλά και στις ΗΠΑ τα τελευταία χρόνια, η μεγαλύτερη διαδικτυακή εξτρεμιστική κινητοποίηση προέρχεται από τις διάφορες ακροδεξιές οργανώσεις. Άλλωστε ο μεγάλος κερδισμένος της εργαλειοποίησης της αντίδρασης στα μέτρα για την αντιμετώπιση της πανδημίας στο διαδίκτυο ήταν οι ακροδεξιές οργανώσεις, οι οποίες προσέγγισαν μεγαλύτερο αριθμό ανθρώπων ευάλωτων στην προπαγάνδα, κινητοποίησαν ριζοσπαστικοποιημένα άτομα και διέσπειραν την προπαγάνδα τους.

Η σχετικοποίηση της ιδεολογίας και η διαδικτυακή διάσταση της ριζοσπαστικοποίησης συνδέονται και με μία άλλη σημαντική πτυχή που ενταντικοποιήθηκε επίσης κατά τη διάρκεια της πανδημίας και είναι οι θεωρίες συνωμοσίας. Σε αρκετές περιπτώσεις η εξτρεμιστική και τρομοκρατική προπαγάνδα βασίζεται σε θεωρίες συνωμοσίας, από την «Μεγάλη Αντικατάσταση» των ακροδεξιών οργανώσεων, μέχρι την «Σιωνιστική Συνωμοσία» των ισλαμιστικών, οι θεωρίες συνωμοσίας ήταν και θα είναι εκεί. Δεν είναι τυχαίο πως κυρίως οι ακροδεξιές, αλλά σε ένα βαθμό και οι ισλαμιστικές και οι ακροαριστερές οργανώσεις, αξιοποίησαν διάφορες θεωρίες συνωμοσίας για την προέλευση της πανδημίας, με στόχο να παρουσιάσουν την επιβεβαίωση της προπαγάνδας τους. Πέραν όμως των οργανώσεων οι θεωρίες συνωμοσίας, τύπου QAnon λειτουργούν και ως μία μορφή παγκόσμιου δικτύου που ενώνει ανθρώπους και ομάδες που δεν είναι πλήρως ενσωματωμένες σε οργανώσεις. Εξίσου επικίνδυνη είναι και η επίδραση που έχουν οι θεωρίες συνωμοσίας σε μεμονωμένους ιδιώτες, οι οποίοι έχουν ριζοσπαστικοποιηθεί κυρίως στο διαδίκτυο, και η θεωρία είναι ο καταλύτης που μπορεί να τους οδηγήσει στη βία και στο να μετατραπούν σε μοναχικούς δρώντες. Μία χαρακτηριστική περίπτωση είναι ο δολοφόνος του πρώην Ιάπωνα Πρωθυπουργού Άμπε, ο οποίος πίστευε πως ο Άμπε ήταν μέλος μίας παραθρησκευτικής οργάνωσης, η οποία ήταν υπεύθυνη για την απώλεια της περιουσίας της μητέρας του.

Σε αυτό το πεδίο συναντάμε για παράδειγμα και την άνοδο του ακροδεξιού βίαιου εξτρεμισμού στις Ηνωμένες Πολιτείες και αλλού, όπου, επιπλέον συχνά εξελίσσεται μέσα σε κλίμα ευαγγελικής αποκάλυψης. Καύσιμο αυτής της ανόδου αποτελούν οι θεωρίες συνωμοσίας, οι οποίες λειτουργούν ανακουφιστικά ως προς τους δράστες και τους υποκινητές των βίαιων επεισοδίων αφού, μέσω της συνωμοσιολογίας, περισώζεται η «τιμή» και η ταυτότητα της ομάδας οποιαδήποτε κατάληξη κι αν έχει το καταστροφικό τους έργο. Στην πραγματικότητα ισχύει το «πιστεύω σε θεωρία συνωμοσίας, άρα υπάρχω».

Η κρίση της πανδημίας συνέβαλε στη διασπορά πάρα πολλών θεωριών συνωμοσίας και γενικότερα στην ενταντικοποίηση της παραπληροφόρησης. Είναι άλλωστε γνωστό πως οι θεωρίες συνωμοσίας παίζουν σημαντικό ρόλο στη ριζοσπαστικοποίηση, με χαρακτηριστικά παραδείγματα, τους δράστες των επιθέσεων σε Christchurch και Hanau (δήθεν αποικισμός από μουσουλμάνους μετανάστες, αλλοίωση της ταυτότητας, σχέδιο «αόρατων» κέντρων αποφάσεων κ.ά.). Ειδικότερα, η πανδημία έδωσε την ευκαιρία στις εξτρεμιστικές ομάδες να ενδυναμώσουν τα αφηγήματα που σχετίζονται με το μίσος, την ξενοφοβία και τη στοχοποίηση θρησκευτικών, πολιτισμικών και φυλετικών ομάδων, αλλά και την αντίδραση στην παγκοσμιοποίηση, στον καπιταλισμό και στην εκλαμβανόμενη ως κρατική καταστολή. Ιδιαίτερα δημοφιλείς ήταν οι διάφορες θεωρίες συνωμοσίας για την υποτιθέμενη κατασκευή του ιού σε εργαστήριο, ώστε να χρησιμοποιηθεί για την επιβολή μέτρων καταστολής και οικονομικού ελέγχου, οι οποίες διακινήθηκαν από εξτρεμιστικές ομάδες και των δύο άκρων.

Παράλληλα, το λεγόμενο «infodemic» της διασποράς ψευδών ειδήσεων δεν είναι πάντα ανεξάρτητο αποτέλεσμα ελλιπούς πληροφόρησης ή λάθους στην κρίση των χρηστών πλατφορμών αλλά μια σοβαρή, συστημική, εκ των έσω διάσταση της συνομωσιολογίας που απευθύνεται σε μοναχικούς δρώντες, με στόχο πολιτικά οφέλη. Πρόκειται για μια διάσταση που υπάρχει και στο πλαίσιο των υβριδικών απειλών. Οι θεωρίες συνομωσίας χρησιμοποιήθηκαν ευρέως για την προώθηση της υποψηφιότητας Τράμπ στις εκλογές του 2016, με χαρακτηριστικότερη περίπτωση την θεωρία QAnon. Μια άλλη περίπτωση είναι αυτή της υποψηφιότητας Μπολσονάρο στην Βραζιλία, όπου η κυβέρνηση χρησιμοποίησε τις πλατφόρμες μηνυμάτων για να διαδώσει παραπλανητικές ειδήσεις, να τρομοκρατήσει σε σχέση με αλλότριες εκλογικές επιλογές, να καταστήσει αναξιόπιστη την αντιπολίτευση και να τη φιμώσει. Δεν είναι τυχαίο πως στη βάση υποστήριξης και των δύο αυτών πολιτικών υπήρχαν βίαιες ακροδεξιές ομάδες.

Οι μοναχικοί δρώντες, τέλος, είναι ένα ακόμη σημαντικό χαρακτηριστικό της διαδικασίας ριζοσπαστικοποίησης στις μέρες μας. Αναφερόμαστε σε ανθρώπους που δεν ανήκουν σε μία συγκεκριμένη τρομοκρατική οργάνωση ή ομάδα, αλλά που ριζοσπαστικοποιήθηκαν μόνοι τους και πραγματοποίησαν την επίθεση μόνη τους. Βέβαια, στην εποχή του διαδικτύου δεν μπορεί κανείς να αποτελέσει κυριολεκτικά μοναχικό δρώντα, καθώς το παγκόσμιο τζιχαντιστικό κίνημα λειτουργεί ως μία διαδικασία σύνδεσης, παρέχοντας «υπηρεσίες» προπαγάνδας, κατήχησης, στρατολόγησης και προετοιμασίας επίθεσης. Αυτός είναι και ο λόγος που σε αρκετές περιπτώσεις μοναχικοί δρώντες είναι ενταγμένοι στην παγκόσμια τζιχαντσφαιρα (Jihadi- sphere). Η παράδοση των μοναχικών δρώντων αφορά σε σημαντικό βαθμό και την ακροδεξιά εξτρεμιστική σκηνή, με χαρακτηριστικότερη περίπτωση τον Άντερς Μπρέιβικ.

Συμπεράσματα

Τα τελευταία χρόνια οι κοινωνίες αντιμετωπίζουν μια παρατεταμένη κατάσταση κρίσεων, που μπορεί να αποτυπωθεί ως ο συνδυασμός δύο κρισιακών διαδικασιών- πολυκρίσεων (poly- crisis) και μόνιμης κρίσης (perma-crisis). Αρκετές από αυτές τις κρίσεις έχουν σχέση με την ασφάλεια, είναι δηλαδή και κρίσεις ασφάλειας, ενώ άλλες, όπως η πανδημία, είχαν επιπτώσεις και στον τομέα της ασφάλειας. Μια από τις σημαντικότερες επιπτώσεις των κρίσεων είναι η πόλωση των κοινωνιών, η οποία σε αρκετές περιπτώσεις πήρε σχεδόν μόνιμα χαρακτηριστικά και οδήγησε στην σημαντική ενίσχυση λαϊκιστικών πολιτικών σχηματισμών και προσώπων. Πρόκειται ουσιαστικά για μια διαδικασία πολιτικοποίησης των κρίσεων, η οποία συνδέθηκε με μισαλλόδοξο λόγο, θεωρίες συνομωσίας και παραπληροφόρηση. Κρίσιμος, αλλά δυστυχώς αρνητικός σε αυτή την περίπτωση, είναι και ο ρόλος του κυβερνοχώρου και ειδικότερα τα Μέσα Κοινωνικής Δικτύωσης. Η πόλωση λειτουργεί ως το υπόβαθρο για την ριζοσπαστικοποίηση που οδηγεί στον βίαιο εξτρεμισμό.

Αυτή την συνθήκη επιβεβαίωσαν δύο μεγάλες κρίσεις που αντιμετώπισε η Ε.Ε., αλλά είχαν διαφορετική αιτία και χαρακτηριστικά και διαφορετικό χρόνο εμφάνισης. Η πρώτη ήταν η προσφυγική/ μεταναστευτική κρίση της περιόδου 2015- 2016 και η δεύτερη η κρίση της πανδημίας που αποτέλεσε ένα παγκόσμιο σοκ για τα κράτη και τις κοινωνίες. Μπορούμε να αναδείξουμε πολλές και διαφορετικές επιπτώσεις των κρίσεων, ωστόσο, το συγκεκριμένο κείμενο εστίασε στον τρόπο με τον οποίο η πόλωση, ως αποτέλεσμα των κρίσεων, ενίσχυσε την ριζοσπαστικοποίηση και τον βίαιο εξτρεμισμό, κυρίως στην ακροδεξιά κατεύθυνση. Μπορούμε να χαρακτηρίσουμε αυτή τη μορφή ριζοσπαστικοποίησης ως εκπορευόμενη από τις κρίσεις. Μια βίαιη κατάληξη πέρα και πάνω από ιδεολογίες, που έχει ως κοινή συνισταμένη τα παράπονα, την απουσία εμπιστοσύνης έναντι των θεσμών και της δυνατότητας των κρατών να διαχειριστούν τις κρίσεις.

Σε αυτό το πλαίσιο, είναι κρίσιμο τα κράτη να σχεδιάσουν και να αναπτύξουν πολιτικές πρόληψης του βίαιου εξτρεμισμού, εκκινώντας από την διαχείριση της πόλωσης. Το τελευταίο άλλωστε διάστημα, όπως αναδεικνύουν και οι στρατηγικές της Ε.Ε. και ιδιαιτέρως αυτή που αφορά την εσωτερική ασφάλεια, η αντιμετώπιση της πόλωσης έχει αναδειχτεί σε βασικό προαπαιτούμενο για τη ενίσχυση της κοινωνικής συνοχής και την προστασία της δημοκρατίας. Επί της ουσίας, η διαχείριση της πόλωσης αποτελεί συστατικό της γενικότερης πολιτικής ανθεκτικότητας έναντι εσωτερικών και εξωτερικών απειλών και κινδύνων. Σε αυτό το πλαίσιο είναι σημαντικό να υπάρξει μια ευρεία εργαλειοθήκη μέτρων πρόληψης και ανθεκτικότητας που να καλύπτουν ένα μεγάλο φάσμα δραστηριοτήτων, που συμπεριλαμβάνει τον κυβερνοχώρο και την επικοινωνία. Ένα πλαίσιο δηλαδή πολιτικής που θα ενισχύσει τα υπάρχοντα μέτρα και πολιτικές για την πρόληψη και την καταπολέμηση του βίαιου εξτρεμισμού, δίνοντας έμφαση στο στάδιο πριν την ριζοσπαστικοποίηση και κυρίως σε επίπεδο κοινωνίας και όχι ατόμου, αλλά και στην ευαισθητοποίηση και την ενημέρωση των πολιτών και ιδιαιτέρως των νέων. Κρίσιμη παράμετρος σε αυτή

την άσκηση αποτελεί η συνεργασία με τον ιδιωτικό τομέα, τους επαγγελματίες της ενημέρωσης, αλλά και προσωπικότητες με επίδραση στα Μέσα Κοινωνικής Δικτύωσης. Μπορεί να φανεί απλουστευτικό, αλλά είναι σημαντικό να διαμορφωθεί ένα θελκτικό αφήγημα που να αναδεικνύει τα θετικά της δημοκρατίας και της πολιτικής συμμετοχής. Η εργαλειοθήκη αυτή μπορεί να περιλαμβάνει, μεταξύ των άλλων, μέτρα όπως τα ακόλουθα:

1. Ενίσχυση της έρευνας για τις νέες τάσεις στα εξτρεμιστικά αφηγήματα και την σύνδεσή τους με την κοινωνική και πολιτική πόλωση.
2. Χρήση εργαλείων εντοπισμού και ανάλυσης του εξτρεμιστικού περιεχομένου στο διαδίκτυο, με έμφαση στη διασύνδεση αυτού του περιεχομένου με τις θεωρίες συνωμοσίας και την όξυνση των διαιρετικών τομών.
3. Αντιμετώπιση του κοινωνικού αποκλεισμού, διαχείριση των παραπόνων των κοινωνικών ομάδων και ενίσχυση της ανθεκτικότητας της κοινωνίας, με πολιτικές που καλύπτουν τρία επίπεδα παρεμβάσεων- γενικός πληθυσμός- ευάλωτες ομάδες και άνθρωποι- άνθρωποι που βρίσκονται σε πρώιμη φάση ριζοσπαστικοποίησης.
4. Ενδυνάμωση των επαγγελματιών πρώτης γραμμής για την πρόληψη και την αντιμετώπιση του ακροδεξιού εξτρεισμού και του ρατσιστικού εγκλήματος, δίνοντας τους επιπρόσθετα εργαλεία για την κατανόηση της πόλωσης και της σύνδεσης της με την ριζοσπαστικοποίηση και τον βίαιο εξτρεισμό.
5. Ενίσχυση της δι-υπηρεσιακής συνεργασίας για την υλοποίηση δράσεων πρόληψης και δημιουργία στρατηγικών δικτύων συνεργασίας, στα οποία θα συμμετέχουν και οι επαγγελματίες των ΜΜΕ και των Μέσων Κοινωνικής Δικτύωσης, δημιουργώντας πλατφόρμες δημοσίου- ιδιωτικού τομέα.
6. Δημιουργία εναλλακτικών θετικών αφηγημάτων: ενίσχυση της αίσθησης του ανήκειν στην κοινωνία και στην πολιτεία και αξιοποίηση εργαλείων στρατηγικής επικοινωνίας.
7. Υποστήριξη πιστοποιημένων, ανεξάρτητων οργανισμών επαλήθευσης γεγονότων με πόρους και εργαλεία.
8. Εφαρμογή ολοκληρωμένων προγραμμάτων ψηφιακού γραμματισμού στα εκπαιδευτικά προγράμματα σπουδών.
9. Δημιουργία αφηγηματικών εκστρατειών βασισμένων σε εμπειρικά τεκμηριωμένα δεδομένα που διαψεύδουν την παραπληροφόρηση και την εργαλειοποίηση της πόλωσης.

Σημειώσεις

- 1 Η χρήση της έννοιας της πόλωσης εμφανίζεται στη βιβλιογραφία ως άρρηκτα συνδεδεμένη με τις αναδυόμενες δυτικές βιομηχανικές μητροπόλεις της Δύσης, τις κοινωνικές διχοτομήσεις που προέκυψαν σε αυτές, καθώς και με την παράλληλη εννοιολογηση του όρου του κοινωνικού αποκλεισμού.
- 2 Esteban, J. and D. Ray, (1994) "On the Measurement of Polarization," *Econometrica* 62, pp. 819-852.
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EU in the Indo-Pacific: Weathering Rough Waters

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Lying on the other side of the globe, at first glance the Indo-Pacific seems as remote to European interests as it gets. A more careful consideration beyond the geographical distance reflected on the map, however, paints a rather different picture. The growing interconnectedness of the European and the Indo-Pacific theaters in the security realm, as well as trade dependencies in strategic commodities, such as critical minerals and semiconductors, necessitate the formulation of a more intentional EU Indo-Pacific policy recognizing the region's centrality in Europe's defense and economic security. At the same time, acknowledging the structural limitations of the prospective engagement is equally important. The delicate state of affairs in Taiwan and the brinkmanship in the South China Sea should also be factored in. The United States has long called for its European partners to shore up their presence in the Indo-Pacific not least to support Washington in its regional *bras-de-fer* with China. Besides Washington's own agenda, a flare-up in the Indo-Pacific will have far-reaching consequences for the EU partners, both financially and strategically. After mapping the European interests linked to the region, this paper will explore the ways in which the EU may tangibly shift some of its attention to the Indo-Pacific demonstrating why this is critical and what constraints it is bound to face in the process.

Introduction

The Indo-Pacific is the geographical space extending roughly from the eastern coast of Africa to the Western coast of the Americas. It encompasses South Asia, Southeast Asia, East Asia, and Oceania. This region hosts more than half of the world's population, accounts for 60% of global GDP^[1], and is home to the busiest maritime trade routes, such as the Strait of Malacca, the Taiwan Strait and the East and South China seas, featuring contested security flashpoints.

For Europe, the Indo-Pacific is a space where economic interests, strategic dependencies, and global stability converge.

The region is also the site of an intensifying rivalry between the United States and China, whose outcome will largely shape the future of the international order. For Europe, the Indo-Pacific is a space where economic interests, strategic dependencies, and global stability converge. Approximately 40 percent of the EU's foreign trade passes through the South China Sea^[2], and European industries depend heavily on supply chains rooted in East and Southeast Asia. Export controls on rare earths, disruptions in semiconductor production in Taiwan or delays in shipping through the Strait of Malacca would reverberate across Europe's economy. Beyond economics, a military escalation in the region could fracture the transatlantic alliance and divert U.S. strategic focus away from Europe, leaving the EU more vulnerable on its eastern and southern flanks. But even absent an armed confrontation in Taiwan, the Indo-Pacific is directly tied to Europe's security through the unprecedented dynamics to which the ongoing war in Ukraine has strikingly given shape. With North Korean troops fighting alongside the Russian invaders and with China implicitly bankrolling the beleaguered Russian economy -thus enabling the perpetuation of the Kremlin's war effort- the Indo-Pacific theater appears to gradually become embedded into the security architecture of the Old Continent. Hybrid threats originating in the Indo-Pacific, such as organized crime and irregular migration, complete the heap of security-related matters that tie Europe to the region.

Recognizing these interconnections, the EU ought to turn anemic engagement into tangible presence. In doing so, Europe must navigate internal divisions and resource constraints, while treading carefully the geopolitical minefield of the U.S.-China rivalry. The question is not whether Europe should engage in the Indo-Pacific, but how, and to what extent, it can pursue its engagement effectively.

Skin in the game

Economic Security

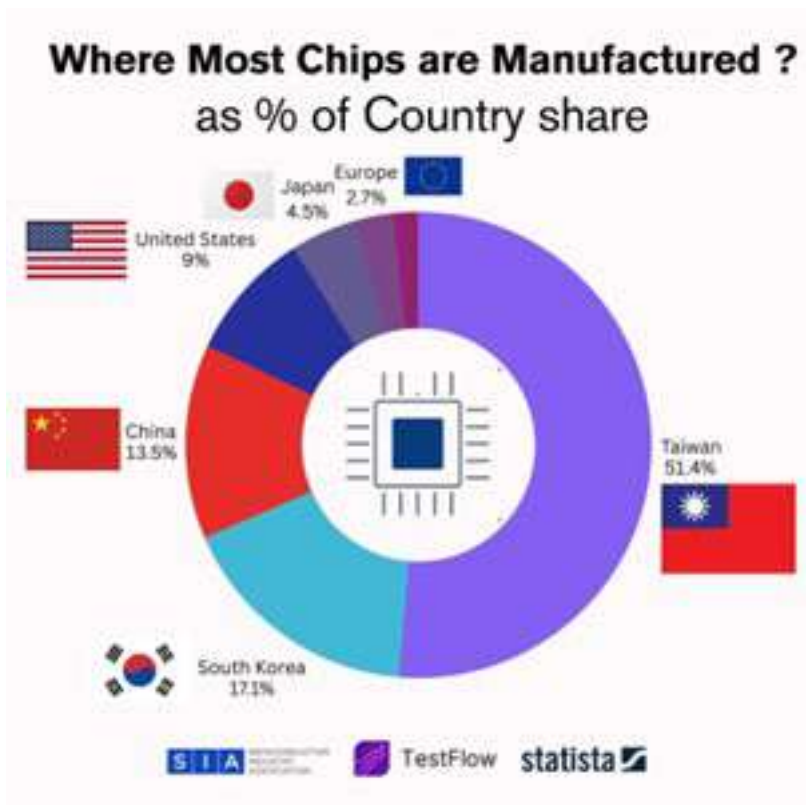
As already hinted, Europe's economic prosperity is tightly bound to the Indo-Pacific. The region hosts four of the EU's top ten trading partners, including China, Japan, South Korea, and India^[3]. Further, key European exports (e.g. machinery, automobiles, and pharmaceuticals) flow eastward, while the EU imports a vast array of goods from Indo-Pacific countries. Two sectors epitomize this interdependence most prominently: semiconductors and critical minerals.

Semiconductors

The EU's economic model is anchored in high-value manufacturing, advanced automotive production, and digital innovation. Maintaining the momentum in these fields hinges on securing an uninterrupted supply of semiconductors. Modern vehicles -particularly electric and hybrid models- integrate hundreds of chips^[4] that control everything from engine management and battery systems to safety sensors and infotainment. Increasingly, the move toward autonomous and connected vehicles depends on higher-performance chips fabricated at advanced nodes. Further, advanced chips are the central components of data centers, 5G and forthcoming 6G networks, and industrial automation systems^[5]. The defence industry, too, depends on reliable access to semiconductors for advanced military aircrafts, radar systems, satellite communications, and command-and-control platforms^[6].

Foundries in Indo-Pacific countries account for the bulk of chip manufacturing worldwide.

Foundries in Indo-Pacific countries account for the bulk of chip manufacturing worldwide. Indicatively, the Taiwan Semiconductor Manufacturing Company (TSMC) produces more than 60% of the world's semiconductors with a 71% market share and over 90% of the most advanced chips^[7]. It is clear that a disruption to Taiwan's semiconductor output would cascade directly into Europe's supply chains resulting in production halts, escalating costs, and loss of competitiveness. It could also impede Europe's digital transformation, compromise the rollout of critical communications networks, and affect sectors vital to national security. Semiconductors are dual-use technologies underpinning both civilian and military innovation. Therefore, any limitation in access to advanced chips would erode Europe's technological sovereignty and strategic autonomy, leaving it reliant on the policy choices and geopolitical stability of other, non-Western actors. The graph below offers a visualization of Indo-Pacific's dominance in global chip manufacturing.



Source: Ali Kamaly

Critical Minerals

Many of these minerals are mined or processed in Indo-Pacific countries, and the geographic concentration of production and refining adds a layer of systemic risk for Europe. [...] While raw mineral deposits exist in many places, China has deliberately captured the downstream part of the value chain, which includes the refining, processing, separation and manufacturing of the final component.

The transition to a low-carbon, technologically advanced economy has placed critical minerals at the centre of EU's industrial policy. Elements such as rare earths, nickel, cobalt, lithium, graphite and others form the backbone of batteries, electric vehicles (EVs), wind turbines, and advanced electronics. Many of these minerals are mined or processed in Indo-Pacific countries, and the geographic concentration of production and refining adds a layer of systemic risk for Europe. First, the role of China is pivotal. While raw mineral deposits exist in many places, China has deliberately captured the downstream part of the value chain, which includes the refining, processing, separation and manufacturing of the final component. For example, China accounts for about 65% of the world's lithium refining capacity, over 70% for cobalt, and an astonishing 90% for rare earth minerals^[9]. Second, Southeast Asia and other parts of the Indo-Pacific supply important raw and intermediate materials. For instance, Indonesia is the world's largest producer of nickel, accounting for more than 50% of global nickel output in 2024 with Australia and New Caledonia also featuring in the list with the top ten global nickel producers^[9]. The *ASEAN Scoping Study on Critical Minerals Supply Chains* found that Indonesia and the Philippines together account for approximately 72% of global nickel output and 14% of global cobalt output^[10]. Crucially, these trends will continue to shape the critical minerals industry in the foreseeable future with Indo-Pacific (especially China) remaining at the epicenter. The tables below show projections about the dominant players in the six main critical minerals in **2030**.

Table 1: Mining

Top 3 producers:	#1, %	#2, %	#3, %
Copper	Chile, 23%	DRC, 14%	Peru, 10%
Lithium	Australia, 33%	China, 23%	Chile, 12%
Cobalt	DRC, 66%	Indonesia, 10%	Russia, 3%
Rare earths	China, 54%	Australia, 18%	Myanmar, 9%
Nickel	Indonesia, 62%	Philippines, 8%	New Caledonia, 6%
Graphite	China, 82%	Madagascar, 3%	Mozambique, 2%

Source: IEA

Table 2: Processing/Refining

Top 3 processors:	#1, %	#2, %	#3, %
Copper	China, 46%	DRC, 7%	Chile, 5%
Lithium	China, 57%	Chile, 15%	Argentina, 13%
Cobalt	China, 74%	Finland, 6%	Japan, 4%
Rare earths	China, 77%	Malaysia, 12%	Australia, 3%
Nickel	Indonesia, 44%	China, 21%	Japan, 6%
Graphite	China, 93%	Japan, 3%	U.S. 1%

Source: IEA

Because the supply chains for these minerals are globally interlinked, a disruption at any point (mining, refining, transport, processing) can severely undercut the EU's environmental policies enshrined in the "Green Deal".

Needless to say, the implications for Europe's green transition are multifold. Europe is seeking to electrify transport, scale-up renewable energy and build digitally interconnected and resilient infrastructure (e.g., smart grids). Electrification means batteries. These in turn require nickel-rich chemistries (for higher energy density), cobalt (for stability in many chemistries), and graphite or other anode materials. Because the supply chains for these minerals are globally interlinked, a disruption at any point (mining, refining, transport, processing) can severely undercut the EU's environmental policies enshrined in the "Green Deal". Consider, for example, the battery value chain. The extraction may be in one country, but the ore is shipped to a refining complex in another country (often China) for conversion into battery-grade materials. The high degree of downstream concentration in one geography makes the supply chain vulnerable. Further, the OECD publication "*The Role of Critical Minerals in Clean Energy Transitions*" shows that China and Myanmar play dominant roles in processing, separation and downstream production of magnets, alloys and components^[11]. From Europe's perspective, this means that raw-material supply risks are not confined to mining. The biggest risk lies in the "mid-stream" and "down-stream" segments, that is, refining, separation, processing and fabrication of value-added materials.

Because China maintains a tight grip on these segments, Europe and other jurisdictions are exposed to strategic bottlenecks. A mining source thousands of kilometers away becomes vulnerable if the processing plant is in China or if shipments must pass through geopolitical flashpoints in the Indo-Pacific. China's preeminence in the strategic supply chains of critical minerals affords Beijing the opportunity to weaponize trade to pursue political ends. The placement of export controls on rare earths –a textbook measure taken by China in its bid to afflict the Western economies- has caused manufacturing disruptions, driving up prices and undermining the competitiveness of domestic products.

Similar to semiconductors, critical minerals are also irreplaceable for the European Defense Technological Industrial Base (EDTIB). Critical raw materials, such as graphite, cobalt, beryllium, and germanium are needed for the production of an array of weaponry, including fighter aircrafts, tanks, missiles, torpedoes, artillery, and ammunition, military hardware in which the EU strives to attain self-sufficiency. According to a risk assessment conducted by the Hague Centre for Strategic Studies^[12], the supply of many of the aforementioned materials is very likely to incur disruptions due to instability or geopolitical bickering.

Military Security

The globalization of markets is what has made the Indo-Pacific indispensable to Europe's economic security. The intensified great power competition reminiscent of Cold War era-style establishment of opposing blocks is what renders the Indo-Pacific vital to Europe's hard security as well.

A military escalation in the Indo-Pacific, especially around Taiwan, would have immediate consequences for Europe by drawing U.S. attention and resources away from the Euro-Atlantic theater.

A military escalation in the Indo-Pacific, especially around Taiwan, would have immediate consequences for Europe by drawing U.S. attention and resources away from the Euro-Atlantic theater. If Washington were forced to reallocate strategic bandwidth to Asia, the EU would face greater pressure to shoulder the security burden on its eastern and southern flanks, where threats from Russia, instability in the Middle East, and irregular migration already test Europe's resilience. Even without open conflict, developments in the Indo-Pacific increasingly shape Europe's security landscape, as seen in the Ukraine war. North Korea's provision of frontline troops and weapons to Russia, along with China's economic lifeline that sustains Moscow's war machine, demonstrates that actors in the Indo-Pacific can directly amplify threats to European stability.

Hybrid Threats

Equally destabilizing for Europe are hybrid threats emanating from the Indo-Pacific region. The overseas territories of an EU powerhouse are turning into a springboard for irregular migration and organized crime. Criminal groups have established themselves^[13] in the French Polynesia, New Caledonia, and the French West Indies engaging in

drug trafficking, illegal fishing, gold smuggling, and arms flows as they exploit the vast exclusive economic zones where maritime surveillance is inadequate. These groups wield substantial control of international migration routes using the French territories as transit nodes for migration flows that ultimately reach Europe. Civil strife, climate change, political instability, and economic disparities in the Indo-Pacific exacerbate this trend. Once migrants enter a French territory, they are closer to gaining access to the European Union's legal space, creating concerns that organized networks could exploit these territories as stepping-stones or "side doors" into Europe. Combined, these pressures increase border insecurity directly impacting Europe's internal security.

This growing entanglement shows that Europe cannot compartmentalize the two regions. The Indo-Pacific is now woven into the continent's security architecture, giving the EU undeniable "skin in the game" in preserving stability and building partnerships across the region.

Pinpointing the main hurdles

To do so, the EU has to step up its involvement in the Indo-Pacific. In formulating its strategy for a more active engagement, Brussels should take into account the limitations it is destined to face.

...the EU's Common Security and Defense Policy (CSDP) is not designed for distant power projection.

First, the EU's Common Security and Defense Policy (CSDP) is not designed for distant power projection. Unlike the U.S., the EU lacks forward bases, logistical capacity, and naval assets suited for sustained Indo-Pacific operations. Any European military contribution would therefore be limited to symbolic deployments, joint exercises, or capacity-building missions.

Consensus-based decision-making and domestic political fragmentation across Europe also constrain the EU's ability to act swiftly or decisively as a whole. Some member states, especially in Central and Eastern Europe, prioritize transatlantic solidarity and view China with suspicion; others, like Germany and Hungary, emphasize economic pragmatism appearing more conciliatory vis-à-vis Beijing due to their tight ties in trade and investments. Furthermore, defense spending disparities among member states hinder the formation of a unified strategic posture. So does the divergence in threat perception: Austria or Ireland might not view the threats stemming from the Indo-Pacific as immediate as they seem to France with its overseas territories or to the Baltic countries with an aggressive Russia on their borders- backed by Indo-Pacific actors.

Compounding to the constraining factors is China's central role in European trade, which creates strong disincentives for confrontational policies.

Compounding to the constraining factors is China's central role in European trade, which creates strong disincentives for confrontational policies. While the EU recognizes the risks of overreliance, especially after the pandemic and the Ukraine war, full-scale decoupling is neither feasible nor desirable. Consequently, the EU must pursue a policy of de-risking without disengaging, a pursuit requiring deft balancing that might sound straightforward in theory but can prove a herculean undertaking in practice even for the most experienced European bureaucrats.

Finally, Russia's ongoing war in Ukraine consumes Europe's attention and resources. Other challenges facing Europe, though, have not magically disappeared. The EU's southern neighborhood grapples with persistent instability. Climate change, energy security, and migration pressures further stretch European capacities. In this context, sustained Indo-Pacific engagement risks being deprioritized unless directly linked to core European interests. Well-constructed and clearly communicated policy messaging on why the Indo-Pacific matters to Europe can serve in achieving the latter.

Rising to the challenge

Despite these obstacles, Europe, both collectively and at national level, has taken some initial steps toward strengthening its presence in the Indo-Pacific.

The *2021 EU Strategy for Cooperation in the Indo-Pacific*^[14] marked a watershed. It framed the region as “vital for the EU’s interests” and called for cooperation in seven areas: sustainable and inclusive prosperity, green transition, ocean governance, digital partnerships, connectivity, security, and human security. The strategy’s ambition is evident in its breadth, yet its implementation remains uneven. Unlike the U.S., the EU lacks a hard-power footprint in the Indo-Pacific. The strategy is therefore designed around partnerships leveraging diplomacy, trade, and development tools rather than military presence. The *EU Strategic Compass for Security and Defense (2022)* sought to fix that. Recognizing the growing assertiveness of China in the Indo-Pacific and the strategic importance of the region to Europe, the strategic compass expanded the Coordinated Maritime Presences (CMPs) to the Indian Ocean while calling for more joint exercises and port calls in the Indo-Pacific with the aim to strengthen the EU regional presence.^[15]

Beyond the collective front some EU member states have forged their own Indo-Pacific policies, contributing to a patchwork of European engagement. France maintains territories in the Indian and Pacific Oceans (La Réunion, New Caledonia, French Polynesia) and a permanent military presence. It views itself as an Indo-Pacific power and a natural anchor for EU engagement. Germany adopted “*Policy Guidelines for the Indo-Pacific*”^[16] in 2020, emphasizing diversification of partnerships and a rules-based order. The Netherlands followed suit in 2020^[17], focusing on trade and security cooperation. Italy and Spain are expanding defense dialogues with India, Japan, and ASEAN.

Given the vitality of the Indo-Pacific to the European economies and to the EU’s strategic autonomy writ large, the moment has come for Brussels to transform its hitherto timid engagement with the region into a vigorous and all-encompassing Indo-Pacific strategy.

Yet, coordination at the EU level remains limited. The EU Naval Mission Atalanta (operating in the western Indian Ocean) and joint exercises or port calls with partners like Japan and India represent embryonic steps toward a coherent European presence. On the other hand, initiatives, such as *Global Gateway*^[18], promising €300 billion in sustainable investment, aim to enhance Europe’s soft power and support resilient infrastructure in the Indo-Pacific. However, questions remain about financing, coordination, and visibility compared to China’s extensive network of BRI projects. Given the vitality of the Indo-Pacific to the European economies and to the EU’s strategic autonomy writ large, the moment has come for Brussels to transform its hitherto timid engagement with the region into a vigorous and all-encompassing Indo-Pacific strategy.

The following policy recommendations aim to guide European policymaking in this direction:

- Maritime security

Maritime security represents the most practical entry point for upgraded European involvement; and probably the most instrumental one. Trade routes through the South China Sea and Indian Ocean function as Europe’s economic lifelines. The EU’s dependence on maritime security in these waters ties its prosperity to the stability of these distant sea lanes. Building on operations like Atalanta and AGENOR, the EU could expand naval patrols into the broader Indo-Pacific under a new Maritime Security Compact with ASEAN and regional partners within the framework of the EU Maritime Security Strategy (EUMSS). It could also reinforce the EU Coordinated Maritime Presences (CMPs) concept in the northwestern Indian Ocean and explore its extension to the western Pacific. Similarly, it can expand joint naval drills with Indo-Pacific partners both in geographical breadth and in scope. In particular, joint exercises may be conducted in more parts of the Indo-Pacific waters, while including training in war scenarios, red teaming, and breaking of potential naval blockades of critical sea lanes. Additionally, the EU could ramp-up investments in information-sharing mechanisms and capacity-building for regional coast guards. Such measures would not only safeguard critical trade routes but also demonstrate Europe’s commitment to free navigation and to a rules-based maritime order.

- Supply chain diversification

To reduce strategic dependencies, the EU should diversify semiconductor supply chains by strengthening partnerships with Taiwan, South Korea, and Japan, while supporting EU domestic chip production through the European Chips Act.

To reduce strategic dependencies, the EU should diversify semiconductor supply chains by strengthening partnerships with Taiwan, South Korea, and Japan, while supporting EU domestic chip production through the European Chips Act. Developing critical minerals partnerships with Indonesia, Australia, and India under transparent environmental and labor standards could also go a long way in feeding into Europe's image as a global leader in sustainable development, while buttressing the diversification of the continent's supply chains. A credible economic footprint would reinforce Europe's relevance and complement its security engagement.

- **Multilateralism and Diplomacy**

Europe's comparative advantage still lies in norm-setting and diplomacy. The EU should try to act as a mediating voice in U.S.-China tensions, emphasizing international law and open trade, while fostering regional crisis prevention initiatives, including confidence-building measures in the South China Sea. Regarding ASEAN, the EU may institutionalize the EU-ASEAN strategic dialogue with a permanent secretariat-level mechanism and build on the EU-ASEAN strategic partnership to revive sincere talks on a region-to-region free trade agreement, which will enhance integration and mutual economic resilience. Further, the EU would do well to upgrade the current format of talks from a ministerial to heads-of-state level dialogue. Such diplomatic activism would underscore Europe's role as a stabilizing actor rather than a partisan power.

- **Selected Bilateral Partnerships**

The EU should deepen cooperation with established partners (Japan, India, Australia, and South Korea) and initiate partnerships with others through joint exercises, technology synergies, and joint research in critical technologies and cybersecurity. Triangular cooperation (e.g., EU-Japan-ASEAN infrastructure projects) could amplify impact while sharing burdens. A more robust presence would also send a message to China and North Korea that Europe is not a passive spectator of the latter's intercontinental interference on Russia's side in Ukraine. Rather, it will show that Europe can bring the competition to their own neighborhood, reinforcing its bargaining position. By strengthening the capacities of their own regional rivals while keeping channels of communication open, the EU can plausibly have a shot at persuading China and North Korea to dial down support to Moscow switching to a bold, but calculated, sticks-and-carrots approach.

- **Leveraging NATO**

While the EU should avoid duplicating NATO's structures, closer coordination can align transatlantic and Indo-Pacific strategies. NATO's 2022 Strategic Concept^[19] already recognizes China as a systemic challenge. European contributions to Indo-Pacific security can thus complement, rather than compete with, Alliance objectives. For instance, enhanced interoperability between EU naval deployments and NATO partners in the region, along with coordinated sanctions and export-control regimes, can further reinforce collective deterrence.

Conclusion

The Indo-Pacific has emerged as a key node along the chain of the core European interests. Although pressing issues in its immediate neighborhood would not allow the EU to realize a "pivot to Asia" akin to that professed by the Obama administration back in 2011, the EU leadership would do well to formulate a holistic Indo-Pacific policy in its quest for strategic autonomy. Europe's economic security largely rests upon intricate supply chains of strategic commodities, such as semiconductors and critical minerals. With upstream and downstream segments of these supply chains concentrated in Southeast Asia and even dominated by China, Europe is vulnerable to trade bottlenecks that can cause unmanageable setbacks in EU's industrial production, green transition, and defense innovation. From a military perspective, the direct and indirect support of certain Indo-Pacific countries to Russia - namely North Korea and China- has laid bare the interconnectedness of the strategic theaters spanning the Eurasian supercontinent, while the Sino-American rivalry, if not tempered, risks to divert Washington's resources away from Europe leaving the latter exposed to multiple threats. Expanding on the already existing cooperation mechanisms with Indo-Pacific countries and harnessing its central role in global diplomacy and multilateralism, the EU must prop-up its engagement in the region in its bid to safeguard the aforementioned interests. Coordination with NATO is also essential as the two distinct alliances work closely to achieve common goals in the Indo-Pacific complementing each other rather than going circles in an unproductive overlapping. Structural and systemic limitations may hinder deeper involvement, but the EU has the ability to navigate constraints to the degree that its Indo-Pacific engagement does not raise the risks of accentuating intra-EU divisions or exacerbating geopolitical tensions that might bring the region to the precipice of an armed confrontation.

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Migration

Long-term Effects of the Refugee Crisis on Greek Public Opinion Regarding Immigration

Migration Diplomacy in Greek–Turkish Relations: Geopolitical Dimensions and Rent-Seeking in the Eastern Mediterranean

Rethinking Solutions: The Role of Third-Country Agreements in Europe’s Migration Crisis

Temporary Guests or City Residents? Governing Migrant Inclusion in Athens amid Political Dependence and Structural Barriers

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Introduction

The 2015 refugee crisis was a pivotal event that shaped public debates on immigration in Europe, leading to the negotiation of bilateral agreements with Europe's neighbors to manage refugee inflows and culminating in a new framework for European Union (EU) members to share the costs associated with refugee inflows. Among all EU members, "frontline" states such as Greece were the most affected by the crisis. By comparison to other large migrant-hosting countries in Europe which also received large inflows of migrants, Greece received a disproportionately large number of refugees in relation to its population size.¹ The long-term effects of this landmark event have not yet been studied. This report provides such an analysis focusing on public opinion in Greece. Specifically, we analyze data from before and after the refugee crisis to test whether the crisis intensified anti-immigrant attitudes in aggregate public opinion.

Media coverage of the refugee crisis and public statements made by political elites regarding immigration in Greece have generated the perception that the sharp rise in refugee inflows has had a lasting negative effect on public attitudes toward immigration. At the height of the refugee crisis, Kyriakos Mitsotakis, whose Nea Dimokratia party was then the largest party in opposition in the Greek parliament, noted that the chaotic conditions in the refugee camps and lack of any government planning for the handling of the refugee crisis intensified xenophobia and extremism.² Similar views are heard from the NGO sector: Lefteris Papagiannakis, leader of advocacy and research for Solidarity Now noted that the lack of efforts to integrate migrants and refugees and the political exploitation of the refugee crisis have made Greek society less accepting of migrants than it used to be.³ In public debates, the refugee crisis is portrayed as having caused "fatigue"⁴ among the native population, feeding racism and xenophobia.⁵ Media coverage directed attention away from the mismanagement of the crisis and focused instead on its negative repercussions for local populations, while some conservative politicians referred to immigration inflows as an "informal, illegal colonization" of the country.⁶ These narratives feed conservative politicians' claims that the population demands stricter immigration policies. Reacting to that perspective, several members of parliament have advocated restricting migrants' social integration and increasing border controls to prevent further inflows.⁷

The scholarly literature seems consistent with the perspective that exposure to large refugee inflows can engender negative responses among the native population. At the individual level, a positive correlation has been shown between exposure to the 2015 refugee crisis and short-term support of anti-immigrant policies in the native population. Specifically, using data collected soon after the 2015 crisis, Hangartner et al. (2019) show that proximity to the crisis caused an increase in negative attitudes toward refugees and other migrants⁸. The mechanisms underlying these short-term effects can be multiple, and are difficult to separate from displaced negative reactions to the state's mismanagement of the crisis.

If we take existing short-term effects of the crisis as a point of departure and assume that direct physical proximity and exposure to refugees and other migrant inflows causes immigration attitudes to harden, then we would expect to see a negative secular trend in public opinion concerning immigration in Greece over time, given the overall rise in migration inflows. More negative views should be recorded after the crisis compared to the period prior to the onset of the crisis in 2015. Moreover, such a pattern should be more pronounced in Greece relative to other EU countries that were less affected by the crisis. We explore these hypotheses using aggregate public opinion data that are freely available from the European Social Survey.

1 Figures A1 and A2 in the appendix show refugee arrivals in Greece and the four larger refugee-hosting countries in the European Union by year over the past decade).

2 See <https://www.protothema.gr/politics/article/613653/mitsotakis-oi-eikones-anarhias-s-ti-mutilini-kai-ti-hio-pistopoion-tin-anikanotitatis-kubernisis/> [Accessed 9/2/24].

3 <https://www.news247.gr/erevnes/erevna-20-20-oi-polites-lene-nai-sti-metafora-prosfigon-stin-ipeirotiki-ellada/>.

4 <https://www.antenna.gr/Politics/article/4/557126/koymoytsakos-oi-ellines-den-einai-rat-sistes-alla-yparxei-metanasteytiki-koposi>

5 See, for example, the statement by Vassilis Kanellis, news editor at in.gr, regarding the link between the political conflicts surrounding the refugee camps and intensifying racism and xenophobia: <https://www.in.gr/2020/09/09/apopsi/politiko-vaterlo-sti-moria-enisxyei-ton-ratsismo-kai-tin-kse-nofovia/>. [Accessed 9/2/24].

6 The statement is attributed to Nea Dimokratia's Alexis Samaras: <https://www.politico.eu/article/migration-divides-greek-government-refugees-antonis-samaras-kyriakos-mitsotakis-syriza/> [Accessed 9/2/24].

7 For example, in 2020, Dimitris Vartzopoulos, a member of parliament for the ruling Nea Dimokratia party stated that many MPs are in favor of constructing closed camps for refugees on uninhabited islands because the way local populations view all migrants is changing. See <https://www.parapolitika.gr/politiki/article/1039522/vartzopoulos-arketo-vouleutes-uper-ton-kleiston-domon-metanaston-s-akatoikita-nisia/> [Accessed 9/2/2024].

8 That study exploits proximity to the Turkish coast as a way to analyze the effects of the crisis by taking advantage quasi-random variation in the size of refugee inflows across different Aegean islands. Data were collected within a year of the peak of the crisis. Longer-term effects have not yet been explored within a framework that allows for causal inference - though for an exception, see Choi and Sambanis (2024).

Effect of the Refugee Crisis on Public Attitudes Toward Immigration in Greece

Trends in ESS data on public attitudes toward immigration since 2002

ESS data from Greece are available for several years (waves): 2002, 2004, 2008, 2010, 2020⁹. To explore changes in public opinion over time, we identify all years for which ESS data on Greece is available as well as all survey items pertaining to immigration attitudes for which we have data for all of those years/waves of the ESS survey, and we plot over-time trends. The complete list of survey items (variables) is included in Table 1 of the appendix.¹⁰ Figure 1 plots over-time trends in these variables since 2002. We plot means per survey round for each of the variables included in Table 1.¹¹ Note that the questions asked in these surveys do not distinguish between attitudes toward asylum seekers vs economic migrants, so what is presented below is opinion toward “migrants” as an aggregate category.

Variable	Label	Description	Scale
<u>imsmetn</u>	same race	Allow many/few immigrants of same race/ethnic group as majority	1: Allow none; 2: Allow few 3: Allow some; 4: Allow all
<u>imdfetn</u>	different race	Allow many/few immigrants of different race/ethnic group from majority	1: Allow none; 2: Allow few 3: Allow some; 4: Allow all
<u>impcntr</u>	poorer country	Allow many/few immigrants from poorer countries outside Europe	1: Allow none; 2: Allow few 3: Allow some; 4: Allow all
<u>imbgeco</u>	good for economy	Immigration bad or good for country's economy	0: Bad for the economy 10: Good for the economy
<u>imueclt</u>	enriches culture	Country's cultural life undermined or enriched by immigrants	0: Undermined by immigrants 10: Enriched by immigrants
<u>imwbcnt</u>	improves country	Immigrants make country worse or better place to live	0: Worse place to live 10: Better place to live

Table 1: Variables, labels, and corresponding scales. Average sample size per question and wave: $n = 2,438-2,466$. Note: variables imsmetn, imdfetn and impcntr have been recoded so that higher values indicate more pro-immigrant attitudes.

⁹ Round 10 of the ESS was scheduled for 2020 but was delayed due to COVID-19. Data for Greece were collected between 2021-22.

¹⁰ The data is publicly available at <https://www.europeansocialsurvey.org>. We analyze unweighted data; weight-adjusted results look similar.

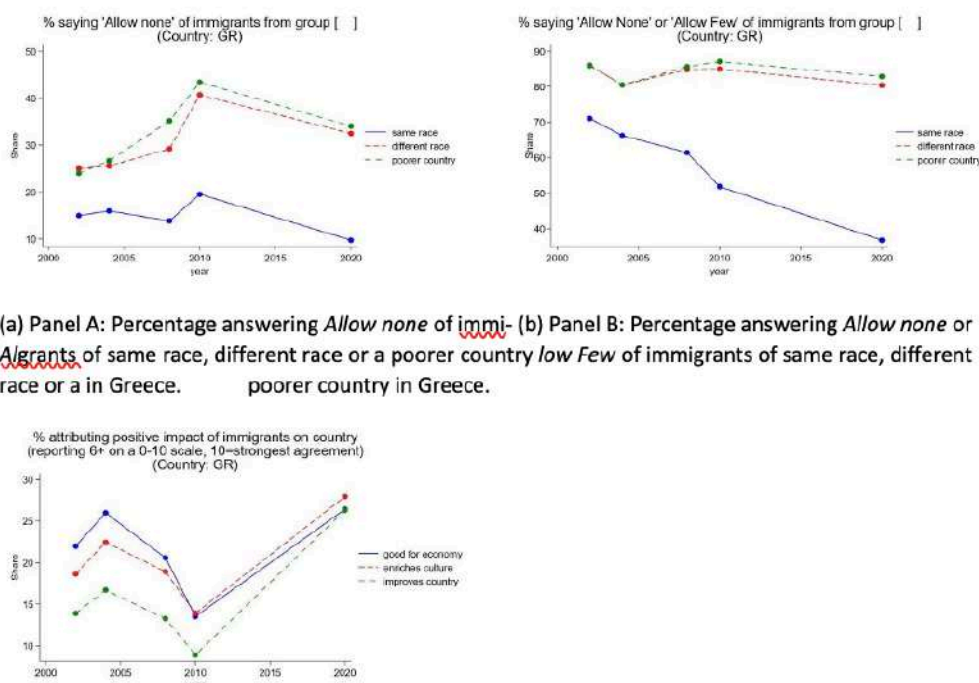
¹¹ Appendix 1 includes the raw data in Table format.

What becomes immediately clear from Figure 1 is that the refugee crisis of 2015 has not caused an aggregate-level deterioration of public opinion toward immigrants in Greece.

We show trends in our six outcomes in separate panels of Figure 1. The top panels show trends in “openness” toward admitting more immigrants in the country as a function of their characteristics. We show trends for immigrants of the same (imsmetn) or different (imdfetn) ethno-racial background as the majority Greek population as well as immigrants from poorer non-European countries (impcntr). The top left panel of Figure 1 shows that the share of the Greek public who would admit no immigrants of a different ethno-racial background or from poor countries is consistently low and has not increased over time, including during the period after the 2015 crisis. Similarly, the share of the public who would admit “none or only a few” is small and has actually increased somewhat since 2010 (top right panel). Attitudes toward immigrants or refugees of the same ethnicity as the majority population are markedly better over time.¹²

The improvement in attitudes toward immigrants with smaller perceived ethno-racial differences from the native population (imsmetn) makes the persistently negative attitudes toward ethnically or racially different immigrants seem more pronounced over time and suggests the possibility that racism shapes xenophobic attitudes in Greece. Yet that gap may also reflect the fact that the first wave of immigrants to Greece from other Balkan countries in the late 1980s and early 1990s is now socially integrated; first-wave migrants were ethno-racially more proximate to the Greek population compared to the current wave and there has been more time for natives to accept the fact of the social integration of immigrants from Balkan countries. More importantly for our analysis, the gap in attitudes toward ethno-racially similar vs different immigrants predates the 2015 refugee crisis; our figures show that the gap grows at least a decade prior the onset of the crisis.

The bottom subplot of Figure 1 shows trends in beliefs regarding the impact of immigration on the economy (imbeco), the country’s cultural life (imueclt) and the country overall (imwbcnt), with higher values suggesting more positive attitudes. These data show clearly a trend toward improving attitudes toward immigrants over time and, in particular, during the period that includes the refugee crisis. Compared to 2010 and all other available data points prior to the crisis, Greeks are now more likely to say that immigration is good for the economy, that the country’s cultural life is enriched by immigration, and that immigrants make the country a better place to live. That improvement notwithstanding, average scores for all 3 measures hover below the mid-point of the 10-point scale, thereby suggesting that overall public opinion is still negative, though slightly less so compared to pre-crisis levels. Yet the 2015 crisis has not made these attitudes worse compared to pre-crisis levels.



12 It is not clear which groups respondents are referring to when answering this question, however. Presumably, Ukrainians since the onset of the Russo-Ukrainian war would be included in this category; perhaps also Albanian migrants on the basis of racial similarity to the native population.

(c) Panel C: Percent agreeing that immigrant impact is positive in Greece. A score of 6 and above on a 0-10 scale is coded as positive impact (where 10 is strongest agreement with the view that immigrants' impact is positive).

Figure 1: Change over time of the percentage of respondents by answers for all measures of immigration attitudes; 2002 - 2020. The figure is divided into three panels: Panel A and Panel B at the top, and Panel C below.

Our data show a sharp deterioration of attitudes toward immigrants and a spike in xenophobia occurring in Greece around 2010, soon after the onset of the debt crisis, which resulted in a prolonged period of fiscal austerity policies and a sharp decline in living standards, combined with an explosive increase in unemployment rates as shown in Figure 2. Thus, the sharpest decline in public attitudes toward immigrants took place in the context of an *economic crisis rather than a refugee crisis* (see also Sambanis, Nikolova and Schultz (2022)).

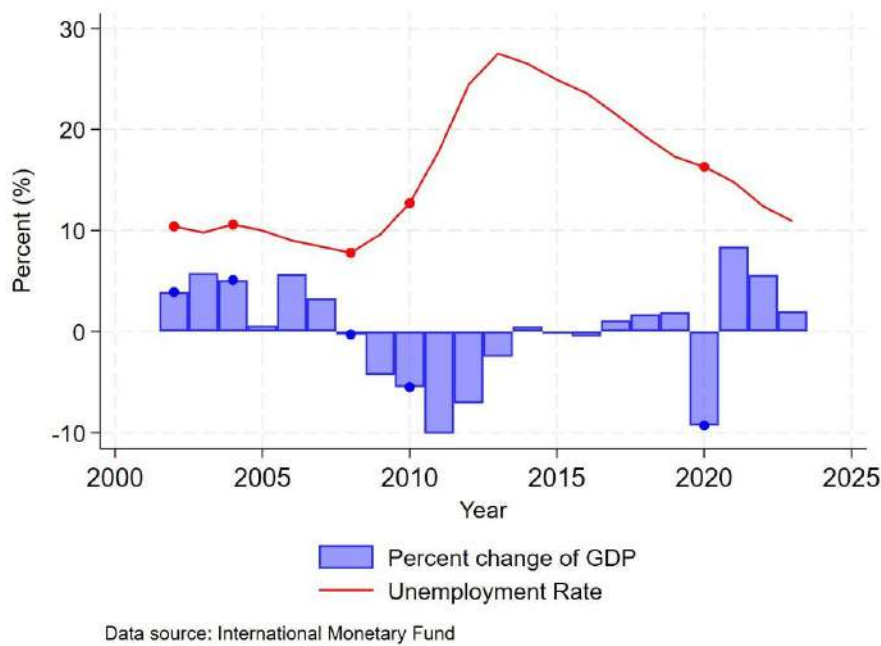


Figure 2: Economic indicators: percent change in GDP (constant prices) and unemployment rate

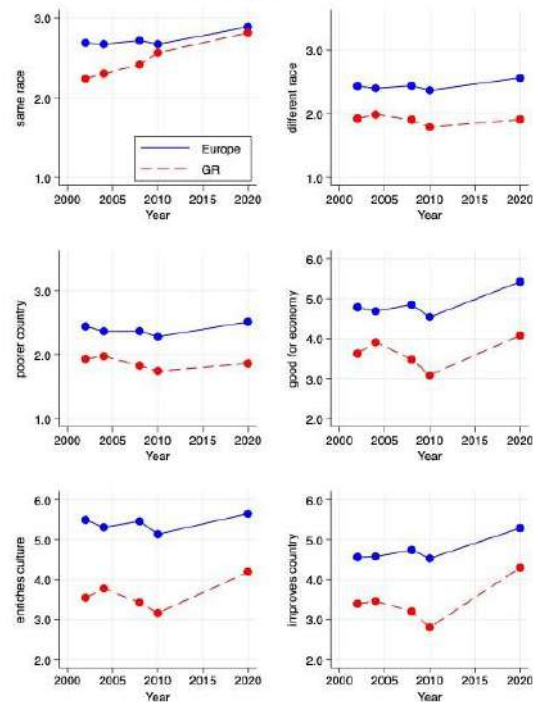
The biggest drop in the survey item averages took place between 2008 and 2010, at the start of the economic crisis, and the most negative immigration attitudes were recorded in 2010, the year with the largest drop in per capita GDP and largest increase in unemployment. By contrast, the peak of the refugee crisis in 2015 and its aftermath are associated with a non-trivial improvement in employment and not worsening trends in GDP.

Comparison to other EU countries

Next, we take advantage of the availability of standardized cross-country data in the ESS to test whether the Greek public has become more anti-immigrant over time and, specifically, after the 2015 refugee crisis. Individual country trends prior to 2015 may very well be different from each other due to country-specific differences in experiences with immigration, or differences in the timing of elections in which immigration features as an important policy issue. We therefore aggregate country-level data and consider the EU average for all survey items that were also collected for Greece on the same years. Results are shown in Figure 3, which plots Greek and EU averages over time for all six outcomes.¹³

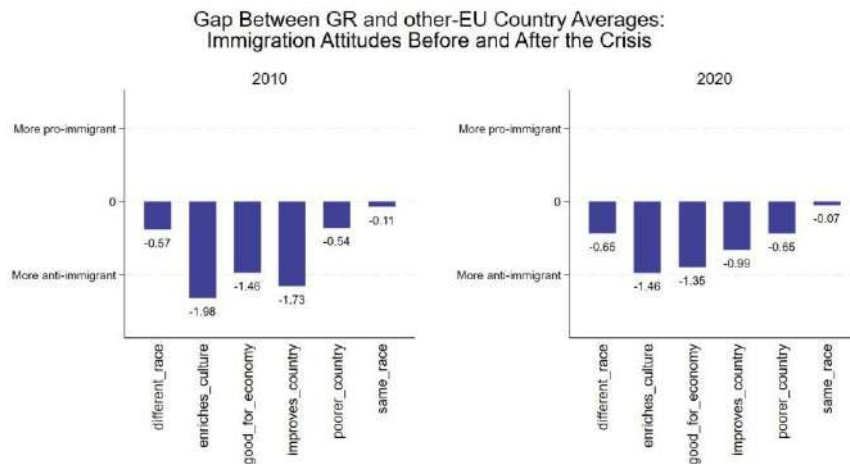
¹³ Refer to Table 1 for the scale used to code outcomes for each variable. Higher values indicate more pro-immigrant attitudes for imbgco, imueclt, and imwbcn; and less pro-immigrant sentiment for imsmetn, imdfetn, impcntr.

Time trends in public opinion on immigration for Europe and GR



Data source: European Social Survey (ESS)
Note: variables have been recorded so that higher values always indicate more pro-immigrant attitudes

Figure 3: Over-time trends in immigration attitudes since 2002: Greece and EU comparison



Data source: European Social Survey (ESS)
Note: variables have been recorded so that higher values always indicate more pro-immigrant attitudes

Figure 4: Gap between Greek and EU averages before and after the refugee crisis

Two things stand out in this comparison. First, Europe as a whole has become more pro-immigrant over the past ten years, thereby challenging the commonly held perception that the increased support of right-wing nationalist parties reflects a broad-based turn toward more anti-immigrant preferences among the majority of voters (though that pattern could be attributed to increased polarization, which is something we return to in the conclusion). Second, the perception of Greece as a more anti-immigrant country than the EU average is borne out in the data, however that gap is either constant or closing over time. This last point is seen more clearly in Figure 4 which plots the gap between the Greek and EU averages with regard to each variable included in our analysis before and after the 2015 crisis. We conclude from this analysis that there is no evidence in the ESS data that the 2015 refugee crisis had persistently negative effects on attitudes toward immigrants in Greece.

Validating Results Using World Values & Eurobarometer Surveys

Next, we turn to data from the World Values Survey and the Eurobarometer Surveys.

World Values Survey

The World Values survey is conducted across countries in waves. We utilize data from the 7th wave (Haerper et al., 2022; Inglehart et al., 2014). Because there are no data from Greece in waves 5 and 6. We also use data from the European Values Survey from 2005-2010 which asks two identical questions as the WVS. The first item (# C002) asks whether “employers should give priority to nationals [Greeks] than immigrants” and respondents can agree (1), disagree (2), or neither agree or disagree (3) (we drop neutral respondents from the plot). The second item (# E143) asks about “people from less developed countries coming [to Greece] to work” and whether the government should “1 = Let anyone come who wants to; 2 = Let people come as long as there are jobs available; 3 = Put strict limits on the number of foreigners who can come here; or 4 = Prohibit people coming here from other countries.” Mean values for each item for the two periods are shown in Figure 5. Responses are fairly consistent over time with no sharp increase noted after the crisis.

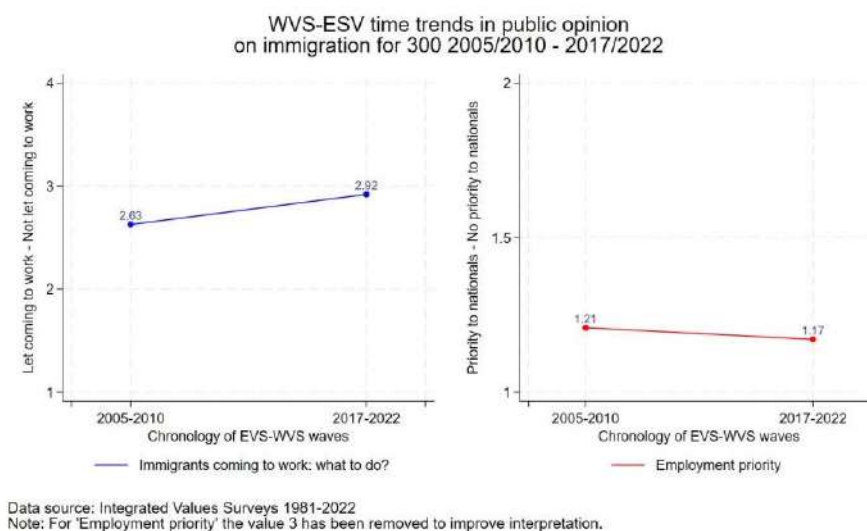
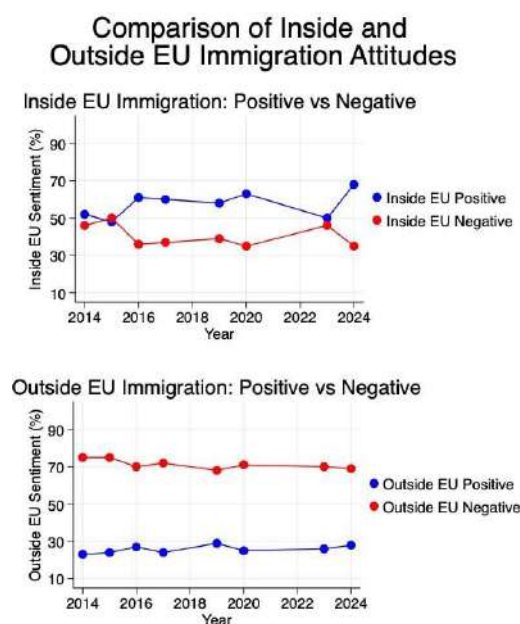


Figure 5: Time trends for EVS-WVS 2005/2010 - 2017/2022.

Eurobarometer Survey

Next, we plot data from Eurobarometer surveys.¹⁴ We are able to find over-time data for several variables, which we list in Table A17 in the appendix. The questions are fairly general in nature; we show results from two questions that ask respondents whether immigration from (a) other EU countries or (b) outside of the EU evokes a positive or negative feeling. Figure 6 plots the results. Since 2014, we see a fairly flat trend with reference to immigrants from countries outside the EU. The majority of the population (approximately 70%) registers negative feelings while almost one third of the sample registers positive feelings and these numbers don't change much though there is a slight decline in the share of respondents registering negative attitudes after the refugee crisis. Results with reference to immigrants from within the EU show slightly more variability with the share of people registering positive feelings increasing after the crisis.



Data source: Eurobarometer - EU

Figure 6: Eurobarometer attitudes towards immigration from the EU and outside the EU

Next, in Figure 7 we plot results for an item asking respondents whether they agree or disagree that immigrants “contribute a lot to our country” (4 options: total/tend to agree; totally/tend to disagree). This is the only piece of evidence until now that might support the assertion that the crisis drove the anti-immigrant sentiment. However, the evidence here is imprecise because of the gap in data points between 2008 and 2015 – a period which includes the debt crisis – and which we saw earlier was associated with a sharp deterioration of attitudes toward immigrants. This implies that the widening gap in attitudes might have preceded the refugee crisis. The drop in the share of respondents who agree that immigrants “contribute a lot to Greece” between 2015 and 2017 is actually quite small and that decline is completely erased as we move further away from the crisis. Interestingly, sentiment toward immigrants turns slightly more positive in the last round of the Eurobarometer survey.¹⁵

Finally, Figure 8 plots results from an item asking whether “additional measures [should] be taken to fight irregular immigration of people from outside the EU” and respondents can choose among the options “Yes, preferably at an EU level”, “Yes, preferably at a national level”, “Yes, at both levels”, and “No, no need for additional measures.” We see flat lines with the vast majority of Greeks supporting stronger measures to fight illegal migration; yet those preferences predate the onset of the refugee crisis.

¹⁴ See <https://europa.eu/eurobarometer/screen/home>.

¹⁵ For a replication of this analysis for Germany, see Appendix. The warming trend toward immigrants and refugees since the refugee crisis of 2015 is also evident in Germany.

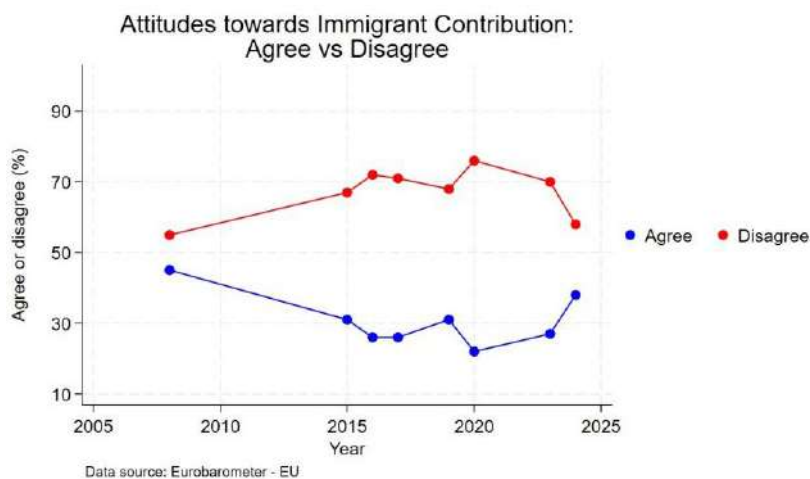


Figure 7: Eurobarometer - agree or disagree that immigrants contribute a lot to Greece

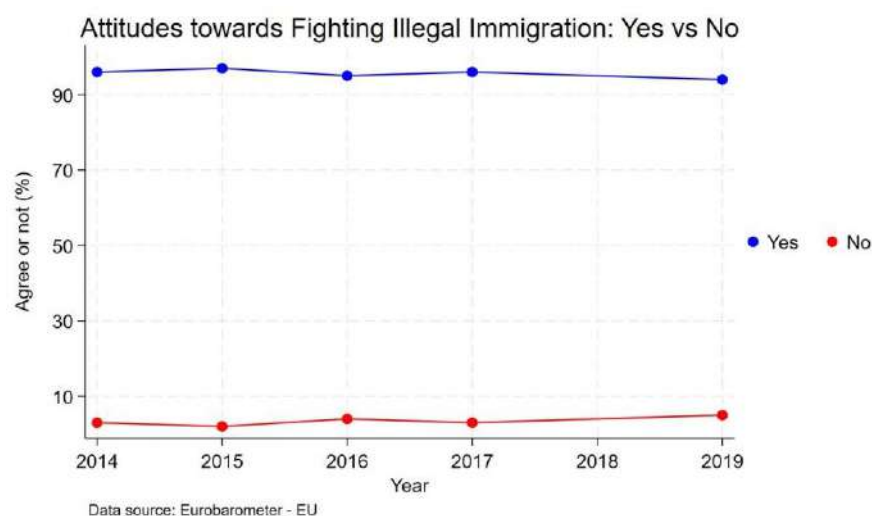


Figure 8: Eurobarometer - agree or disagree with additional measures to fight irregular non EU immigration?

Conclusion

Summarizing the results from several public opinion polls, we have shown that the refugee crisis of 2015 has not had an appreciable long-term effect on aggregate attitudes toward immigrants in Greece. Although Greek public opinion registers persistently negative attitudes toward immigration, there has been no increase in negative attitudes over time and, to some extent, we observe some minor improvements in recent years.¹⁶ In fact, this macro-level result is in fact consistent with studies of individual-level effects of increased exposure to the refugee crisis. Choi and Sambanis (2024) find that students in the University of Aegean who were exposed to the crisis are more empathetic toward refugees than their counterparts who graduated from other universities in parts of the country with little or no refugee exposure or compared to other Aegean University students who graduated prior to the onset of the crisis. Fabbe et al. (2023) find that increased exposure to the crisis does not shape local elites' individual preferences regarding refugee resettlement; and Fabbe, Kyrkopoulou and Vidali (2022) find that exposure does not shape individual-level citizen attitudes toward the location of refugee reception centers.

A possible concern with the aggregate level data that we have analyzed in this report is that aggregate patterns may hide important differentiation in opinions among subgroups of the population. We have not considered the possibility that public opinion among some groups of the population may have in fact become more negative in response to the crisis, while others may have become more positive, thereby neutralizing the overall effect of the crisis. Indeed, there could be significant shifts in public opinion among subgroups of the population consistent with evidence of a growing social polarization across many issue areas in several Western democracies over the past decade.

¹⁶ A general pattern of relative stability in attitudes toward immigrants/refugees is also evident in other countries. See Bansak, Hainmueller and Hangartner (2023) and Kustov, Laaker and Reller (2021).

Polarization of opinions regarding immigration could be the result of an iterative backlash triggered by the refugee crisis: first, the crisis could have triggered negative reactions among politically conservative voters, as argued by Dinas et al. (2019). In turn, we conjecture that there could be a “backlash to the backlash” among liberal voters who may have turned more positive toward immigration in recent years to counteract what they perceive as an authoritarian threat emanating from parties supporting anti-immigration policies. As it turns out, we find no evidence of growing polarization in Greece due to the refugee crisis, as we show in Appendix C. For that analysis, we use ESS data on respondents’ self-placement on the left-right political ideology spectrum and we disaggregate our results for each of the variables used in our main analysis, sorting respondents by political ideology. As we show in the Appendix, the attitudes of left-wing vs right-wing respondents move in tandem in Greece whereas they diverge considerably in Germany after the refugee crisis, where right-wing respondents became more anti-immigrant, while left-wing respondents became more pro-immigrant. Thus, while a German “backlash to the backlash” might exist, we do not see evidence of one in Greece.

Finally, while we find that aggregate public opinion remained fairly stable over time with regard to the variables we have analyzed, it is possible that dramatic events such as the 2015 refugee crisis may have generated complex reactions in the native population which are difficult to pick up in the ESS variables we have analyzed. Specifically, the refugee crisis may have reified the support for a strict immigration policy among Greeks who recognize that the country is ill-equipped to handle another mass influx of refugees, while also generating more empathy for refugees, recognizing their plight. New research suggests that general affect toward immigrants and refugees (i.e. feelings of empathy) could grow stronger among natives who experience events such as the 2015 refugee crisis, while at the same time the same people recognize the need for more effective border control policies in response to the realization that the Greek state cannot handle the pressures generated by outside migrant inflows (see Choi and Sambanis, 2024). But for most of the population that was less directly exposed to the crisis, the effects of the crisis appear to be muted, and these effects may well have been different had the crisis been handled better by the state. Our analysis suggests that simply reporting on high aggregate levels of support for border control does not necessarily reflect a high degree of bias and xenophobia in the population. Although in some countries these attitudes may move together, in other countries they are likely distinct. New research should attempt to separate measures of natives’ bias with reference to general affect toward immigrants from native responses to realistic threat generated by the state’s failure to protect both immigrants’ and natives’ rights and welfare during periods of crisis.

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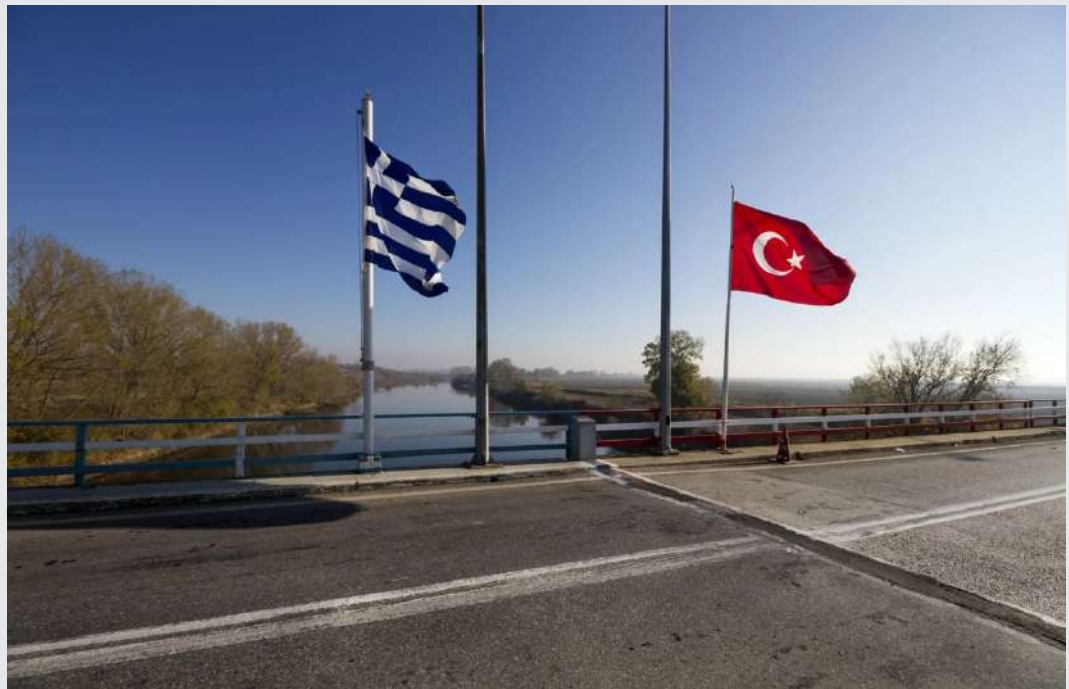
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Migration Diplomacy in Greek–Turkish Relations: Geopolitical Dimensions and Rent-Seeking in the Eastern Mediterranean

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Η Κρίση στον Έβρο και η Γεωπολιτική της Μετανάστευσης

Τα [γεγονότα του Φεβρουαρίου και Μαρτίου του 2020](#) στα ελληνοτουρκικά σύνορα αποτέλεσαν μία από τις πιο χαρακτηριστικές στιγμές όπου η μετανάστευση και η υψηλή πολιτική συναντήθηκαν ευθέως στις ελληνοτουρκικές σχέσεις. Ήταν η πρώτη φορά που ένα κράτος, η Τουρκία, δήλωνε ανοιχτά πως χρησιμοποιεί μεταναστευτικές ροές ως διπλωματικό εργαλείο για να πιέσει όχι μόνο την Ευρωπαϊκή Ένωση, αλλά και έναν γείτονα και σύμμαχο στο NATO, την Ελλάδα. Στις 28 Φεβρουαρίου, η τουρκική κυβέρνηση [ανακοίνωσε](#) πως δεν θα εμποδίζει πλέον τους μετανάστες και πρόσφυγες που φιλοξενούνταν στο έδαφός της να κινηθούν προς τα ελληνικά σύνορα. [Σχεδόν αμέσως](#), χιλιάδες άνθρωποι συγκεντρώθηκαν στον συνοριακό σταθμό του Pazarkule, απέναντι από τις Καστανιές Έβρου, με την ελληνική πλευρά να [απαντά](#) με κλείσιμο των συνόρων, αυξημένη στρατιωτική παρουσία και προσωρινή αναστολή της διαδικασίας ασύλου.

Η κρίση διήρκεσε περίπου τρεις εβδομάδες, με επαναλαμβανόμενες συγκρούσεις στα σύνορα, εκτεταμένη χρήση δακρυγόνων και [καταγγελίες](#) για παραβιάσεις ανθρωπίνων δικαιωμάτων. Τις πρώτες ημέρες της έντασης, ο Πρωθυπουργός της Ελλάδας, μαζί με κορυφαίους αξιωματούχους της Ευρωπαϊκής Ένωσης, όπως η Πρόεδρος της Ευρωπαϊκής Επιτροπής και ο Πρόεδρος του Ευρωπαϊκού Συμβουλίου, [επισκέφθηκαν την περιοχή](#), συνδηλώνοντας συμβολικά και πολιτικά την [ευρωπαϊκή στήριξη](#) προς την Αθήνα. Τελικά, στα μέσα Μαρτίου, και υπό την αυξανόμενη πίεση από την Ευρωπαϊκή Ένωση και τις πρώτες ενδείξεις της πανδημίας COVID-19, η Άγκυρα υποχώρησε, [απομακρύνοντας](#) τους συγκεντρωμένους μετανάστες. Παρά τη λήξη της κρίσης, Τούρκοι αξιωματούχοι τόνισαν ότι η τακτική αυτή θα μπορούσε να επαναληφθεί στο μέλλον, κρατώντας το ζήτημα «ζωντανό» στη διπλωματική εργαλειοθήκη της Άγκυρας.

Παρά τη σημασία του γεγονότος, η κρίση του Έβρου έχει τύχει σχετικά περιορισμένης ανάλυσης, τόσο σε ακαδημαϊκό όσο και σε πολιτικο-στρατηγικό επίπεδο. Αυτό εν μέρει οφείλεται στο ότι εκτυλίχθηκε λίγες μόλις ημέρες [πριν από το ξέσπασμα της παγκόσμιας πανδημίας](#) του COVID 19, η οποία μονοπώλησε τη δημόσια και ερευνητική προσοχή. Όταν γίνεται αναφορά στο επεισόδιο Έβρου, αυτή συνήθως εντάσσεται στο ευρύτερο πλαίσιο της [ευρωπαϊκής προσφυγικής κρίσης](#) ή της πορείας της [Κοινής Δήλωσης ΕΕ-Τουρκίας](#) του 2016. Αν και οι προσεγγίσεις αυτές είναι θεμιτές, συχνά παραγνωρίζουν τη σημασία της κρίσης του Έβρου ως ξεχωριστού επεισοδίου ελληνοτουρκικής έντασης, μέσα από το οποίο αναδείχθηκε η στρατηγική σύνδεση της μετανάστευσης με την εξωτερική πολιτική.

Η κρίση αυτή δεν ήταν απλώς μια πρόκληση για τη διαχείριση των συνόρων. Ήταν ένα σύμβαμα κατά το οποίο διασταυρώθηκαν η κρατική κυριαρχία, η γεωπολιτική ισχύς και η ανθρώπινη κινητικότητα. Σε αντίθεση με την περίοδο 2015-2016, όταν η Τουρκία [βρέθηκε αντιμέτωπη](#) με την άνοδο των προσφυγικών ροών από τη Συρία, στην περίπτωση του Έβρου δεν λειτούργησε ως διαχειριστής μιας υφιστάμενης κρίσης, αλλά ως ο βασικός υποκινητής της. Δεν εμφανίστηκε ως «ρυθμιστής» των μεταναστευτικών ροών με την έννοια της ελεγχόμενης διαχείρισης, αλλά ως δρών που [επιδίωξε να προκαλέσει μια τεχνητή κρίση](#), αξιοποιώντας την ως μέσο πίεσης και εξαναγκασμού. Η επιλογή αυτή φανερώνει σε ποιον βαθμό η μετανάστευση έχει [ενσωματωθεί στην εργαλειοθήκη](#) της διεθνούς πολιτικής της Άγκυρας.

Από την πλευρά της, η Ελλάδα δεν λειτούργησε απλώς ως «θύμα» αυτής της στρατηγικής. Η ελληνική κυβέρνηση επιχείρησε να μετατρέψει την κρίση σε ευκαιρία διπλωματικής αναβάθμισης, παρουσιάζοντας την [Ελλάδα ως τον «προμαχώνα» της Ευρώπης](#) και ζητώντας, με σχετική επιτυχία, πρόσθετη ευρωπαϊκή στήριξη τόσο σε οικονομικό όσο και σε πολιτικό επίπεδο. Παράλληλα, ανέδειξε τον αποσταθεροποιητικό ρόλο της Τουρκίας, προβάλλοντάς την ως [αναξιόπιστο γείτονα](#) που εργαλειοποιεί ευαίσθητα ζητήματα για πολιτικούς σκοπούς. Η προβολή της αποφασιστικής ελληνικής αντίδρασης λειτούργησε ως εσωτερικό πολιτικό εργαλείο, [ενισχύοντας την εικόνα του Ελληνικού κράτους](#) ως ισχυρού, κυρίαρχου και προσανατολισμένου στη Δύση.

Συνολικά, η κρίση του Έβρου αποκάλυψε με εναργή τρόπο ότι η μετανάστευση δεν αποτελεί πλέον μόνον ένα ζήτημα κοινωνικής πολιτικής ή διαχείρισης κρίσεων, αλλά ένα κανονικό μηχανισμό άσκησης ισχύος στο διεθνές σύστημα. Η χρήση της τόσο από την Τουρκία, μέσω στρατηγικής πίεσης, όσο και από την Ελλάδα, μέσω διπλωματικής κεφαλαιοποίησης, καταδεικνύει ότι οι μεταναστευτικές ροές λειτουργούν πλέον ως γεωπολιτικός πολλαπλασιαστής, όχι μόνον στην Ευρώπη, αλλά ιδίως στη μεθοριακή ζώνη της Ανατολικής Μεσογείου. Παρότι η ανθρωπιστική διάσταση αυτών των κρίσεων παραμένει κρίσιμη και απαιτεί διαρκή προσοχή, δεν αρκεί από μόνη της για να εξηγήσει την πολιτική δυναμική που τις συνοδεύει. Η περίπτωση του Έβρου προανήγγειλε ευρύτερες

εξελιξείς στην περιοχή, με κράτη όπως η Αίγυπτος και η Τυνησία να υιοθετούν ανάλογες στρατηγικές, αξιοποιώντας τη διαχείριση των ροών ως μέσο διαπραγμάτευσης με την Ευρωπαϊκή Ένωση και άλλους διεθνείς δρώντες.

Η Έννοια της Μεταναστευτικής Διπλωματίας στη Θεωρία των Διεθνών Σχέσεων

Η μετανάστευση υπήρξε, ιστορικά, [περιφερειακό ζήτημα](#) στην ανάλυση των διεθνών σχέσεων. Ήταν ένα φαινόμενο που θεωρούνταν ζήτημα «[χαμηλής πολιτικής](#)», δηλαδή περισσότερο ανθρωπιστικής, τεχνοκρατικής ή κοινωνικής φύσης, παρά στρατηγικής σημασίας. Ειδικά κατά τον 20ό αιώνα, το πεδίο των διεθνών σχέσεων είχε την τάση να επικεντρώνεται σε θέματα πολέμου, ασφάλειας και κρατικής ισχύος, αφήνοντας τη διακρατική κινητικότητα πληθυσμών εκτός του κεντρικού ερευνητικού ενδιαφέροντος. Οι ελάχιστες σχετικές μελέτες περιορίζονταν κυρίως στη [διεθνοποίηση του μεταναστευτικού ζητήματος](#) κατά τη διάρκεια του Ψυχρού Πολέμου, ενώ η μετανάστευση αντιμετωπιζόταν ως αντικείμενο της κοινωνιολογίας, της ανθρωπολογίας ή των νομικών επιστημών, παρά ως πολιτικό φαινόμενο με γεωστρατηγικές διαστάσεις. Η έννοια της μεταναστευτικής διπλωματίας αναδύεται ως μια συνειδητή προσπάθεια να ενταχθεί η μετανάστευση στον θεωρητικό πυρήνα της διεθνούς πολιτικής ανάλυσης, αναδεικνύοντας τη σημασία της ως εργαλείου ισχύος, διαπραγμάτευσης και γεωπολιτικής επιρροής.

Η έννοια της «[μεταναστευτικής διπλωματίας](#)» (migration diplomacy) αναπτύχθηκε συστηματικά τα τελευταία χρόνια ως εργαλείο ανάλυσης των τρόπων με τους οποίους κράτη αξιοποιούν τη διακρατική κινητικότητα πληθυσμών στο πλαίσιο της εξωτερικής τους πολιτικής. Η σχετική θεωρητική προσέγγιση ανέδειξε τη μετανάστευση όχι μόνον ως ανθρωπιστικό ή κοινωνικό φαινόμενο, αλλά και ως εργαλείο ισχύος και διακρατικής διαπραγμάτευσης. Στο επίκεντρο αυτής της στρατηγικής βρίσκεται η [χρήση της απειλής ή της μόχλευσης της πληθυσμιακής](#) πίεσης με σκοπό την άσκηση επιρροής και την απόσπαση πολιτικών ή οικονομικών ανταλλαγμάτων. Πρόκειται συχνά για μια ασύμμετρη τακτική, μέσω της οποίας κράτη με περιορισμένα μέσα –συχνά αυταρχικά καθεστώτα– στοχεύουν να επηρεάσουν ισχυρότερους, δημοκρατικούς δρώντες, εκμεταλλευόμενα την πολιτική ευαισθησία των τελευταίων απέναντι σε θέματα ανθρωπίνων δικαιωμάτων και κοινωνικής σταθερότητας. Ενδεικτικά, η [κρίση στα σύνορα Λευκορωσίας-Πολωνίας](#) το 2021 αποκάλυψε πώς το καθεστώς Λουκασένκο διευκόλυνε τη μεταφορά μεταναστών από τρίτες χώρες προς την ΕΕ, απαντώντας στις κυρώσεις των Βρυξελλών. Αντίστοιχα, η κυβέρνηση του Σλόμπονταν Μιλόσεβιτς το 1999 [ενθάρρυνε την εκτόπιση Κοσοβάρων](#) προς γειτονικά κράτη, επιχειρώντας να αποσταθεροποιήσει την περιφερειακή τάξη εν μέσω νατοϊκής επέμβασης – μια εξέλιξη που παρακολουθήθηκε στενά και από την Αθήνα, λόγω της εγγύτητας και των βαλκανικών προεκτάσεων της κρίσης.

Η μεταναστευτική διπλωματία αναδεικνύει τον τρόπο με τον οποίο κράτη – [ανάλογα με το αν είναι χώρες αποστολής, υποδοχής ή διέλευσης](#) – συγκροτούν τα συμφέροντά τους και τη στρατηγική τους θέση στο διεθνές σύστημα, χρησιμοποιώντας τη μετανάστευση στο πλαίσιο μιας πιο ευρείας διπλωματικής ατζέντας. Για παράδειγμα, οι Φιλιππίνες αξιοποιούν τη θέση τους ως [χώρα αποστολής εργατικού δυναμικού](#) για να εξασφαλίσουν προξενική προστασία και διμερείς συμφωνίες με κράτη του Περσικού Κόλπου. Η Γερμανία, ως χώρα υποδοχής, [διαμορφώνει τη μεταναστευτική της πολιτική](#) με στόχο όχι μόνον την εσωτερική κοινωνική συνοχή, αλλά και τη διατήρηση επιρροής στην Ανατολική Ευρώπη και τα Βαλκάνια. Αντίστοιχα, το Μεξικό, ως χώρα διέλευσης, [διαπραγματεύεται](#) με τις Ηνωμένες Πολιτείες μέτρα χρηματοδότησης και ελέγχου συνόρων, χρησιμοποιώντας την κινητικότητα προς βορράν ως διαπραγματευτικό εργαλείο στην ευρύτερη διμερή ατζέντα.

Στο πλαίσιο αυτό, η έννοια της [συνδεδεμένης διαπραγμάτευσης](#) (issue-linkage) είναι κεντρική για τη θεωρία της μεταναστευτικής διπλωματίας. Η σκόπιμη διασύνδεση θεμάτων όπως η μετανάστευση, η οικονομική βοήθεια, το εμπόριο ή η ασφάλεια επιτρέπει στα κράτη να επεκτείνουν το πεδίο της διαπραγμάτευσης, χρησιμοποιώντας τη διαχείριση της ανθρωπίνης κινητικότητας ως εργαλείο για την προώθηση παράλληλων πολιτικών σκοπών. Μέσω της διασύνδεσης αυτής, οι μεταναστευτικές ροές δεν αντιμετωπίζονται μεμονωμένα, αλλά εντάσσονται σε ευρύτερες στρατηγικές ανταλλαγών και προώθησης συμφερόντων. Για παράδειγμα, το Μαρόκο, ως [χώρα διέλευσης και εν μέρει αποστολής](#), έχει αξιοποιήσει τη συνεργασία του με την Ευρωπαϊκή Ένωση στο μεταναστευτικό για να εξασφαλίσει αυξημένη χρηματοδότηση, εμπορικά προνόμια και πολιτική στήριξη στη διαμάχη για τη Δυτική Σαχάρα. Η Ινδία, ως μεγάλη χώρα αποστολής, έχει [αξιοποιήσει τη θέση της](#) για να συνάψει διμερείς συμφωνίες προστασίας εργαζομένων με κράτη του Κόλπου και να ενισχύσει τη γεωπολιτική της επιρροή μέσω της ινδικής διασποράς, ιδίως στις Ηνωμένες Πολιτείες και τη Νοτιοανατολική Ασία. Η Ιταλία, [ως χώρα](#)

[υποδοχής](#), έχει επιδιώξει συμφωνίες με τη Λιβύη και την Τυνησία, προσφέροντας χρηματοδότηση και τεχνική βοήθεια σε αντάλλαγμα για την ενίσχυση της αποτροπής των μεταναστευτικών ροών στη Μεσόγειο.

Η θέση ενός κράτους στο μεταναστευτικό «οικοσύστημα», είτε ως χώρα αποστολής, υποδοχής ή διέλευσης, επηρεάζει καθοριστικά το πώς συγκροτεί τις εξωτερικές του σχέσεις και σε ποιο βαθμό μπορεί να κεφαλαιοποιήσει τη διαχείριση της ανθρώπινης κινητικότητας ως διπλωματικό εργαλείο. Η μεταναστευτική διπλωματία διαφοροποιείται ουσιαστικά από την μεταναστευτική πολιτική: δεν αφορά την οργάνωση των διαδικασιών ασύλου ή την ενσωμάτωση μεταναστών, αλλά τον τρόπο με τον οποίο τα κράτη διαπραγματεύονται τη θέση τους στο διεθνές σύστημα μέσω της μετανάστευσης. Στο πλαίσιο αυτό, η κινητικότητα μετατρέπεται από διοικητική πρόκληση σε πόρο στρατηγικής αξίας: όχι μόνο ως άμυνα απέναντι σε κρίσεις, αλλά και ως μέσο διεκδίκησης επιρροής, πόρων ή συμβολικού κύρους. Ιδίως για κράτη που βρίσκονται σε καίριες γεωγραφικές θέσεις, όπως η Ελλάδα και η Τουρκία, η μετανάστευση δεν είναι απλώς ζήτημα διαχείρισης· είναι και ένας τρόπος επαναβεβαίωσης της γεωπολιτικής τους ταυτότητας στο πλαίσιο ενός συνεχώς μεταβαλλόμενου διεθνούς περιβάλλοντος.

Η Εφαρμογή της Μεταναστευτικής Διπλωματίας στις Ελληνοτουρκικές Σχέσεις¹

Η θεωρία της μεταναστευτικής διπλωματίας διακρίνει [δύο βασικές στρατηγικές](#): τη συνεργατική (cooperative migration diplomacy), όπου η κινητικότητα πληθυσμών αποτελεί αντικείμενο διαπραγμάτευσης στο πλαίσιο κοινών στόχων και ωφελειών· και την εξαναγκαστική (coercive migration diplomacy), όπου η μετανάστευση αξιοποιείται ως μέσο πίεσης ή μοχλός εκβιασμού προς άλλα κράτη. Η εφαρμογή των δύο στρατηγικών είναι ιδιαίτερα ορατή στην Ανατολική Μεσόγειο, μέσα από συγκεκριμένες περιπτώσεις που αναδεικνύουν τον τρόπο αξιοποίησης της μετανάστευσης στην εξωτερική πολιτική: η [Ιορδανία](#), φιλοξενώντας εκατομμύρια πρόσφυγες από τη Συρία και το Ιράκ, έχει υιοθετήσει μια συνεργατική στρατηγική, ανταλλάσσοντας ανθρωπιστική φιλοξενία με διεθνή στήριξη, οικονομική βοήθεια και γεωπολιτική αναγνώριση. Αντιθέτως, το καθεστώς Καντάφι στη Λιβύη, ήδη από τη δεκαετία του 2000, απειλούσε ανοιχτά με [«άνοιγμα των πυλών»](#) προς την Ευρώπη κάθε φορά που ένιωθε διπλωματικά απομονωμένο ή οικονομικά πιεσμένο, εφαρμόζοντας μια πρώιμη μορφή εξαναγκαστικής μεταναστευτικής διπλωματίας.

Στις ελληνοτουρκικές σχέσεις, και οι δύο μορφές μεταναστευτικής διπλωματίας είναι παρούσες, αν και με ασύμμετρο τρόπο και σε διαφορετική ένταση. Η Τουρκία έχει συστηματικά επιλέξει την εξαναγκαστική στρατηγική, χρησιμοποιώντας τις μεταναστευτικές ροές ως μέσο πίεσης προς την Ελλάδα και ευρύτερα στο πλαίσιο της εξωτερικής της πολιτικής. Κατά την περίοδο 2015-2016, περισσότεροι από ένα εκατομμύριο πρόσφυγες και μετανάστες διέσχισαν τα ελληνοτουρκικά θαλάσσια σύνορα. Αν και η κρίση αντιμετωπίστηκε κυρίως στο ευρωπαϊκό επίπεδο, είχε σαφές διμερές και εγχώριο σκέλος: η Τουρκία επιχείρησε να ενισχύσει τη διαπραγματευτική της θέση, να αποσπάσει διεθνή στήριξη για το συριακό και να ενισχύσει την εικόνα της στο εσωτερικό, παρουσιάζοντας εαυτήν ως αναγκαίο εταίρο και ρυθμιστή. Το αποκορύφωμα αυτής της στρατηγικής ήταν η Συμφωνία ΕΕ-Τουρκίας του Μαρτίου 2016, την οποία η Άγκυρα αξιοποίησε για να εξασφαλίσει οικονομική ενίσχυση και πολιτικά ανταλλάγματα.

Η πιο ωμή μορφή εξαναγκαστικής μεταναστευτικής διπλωματίας καταγράφηκε στην κρίση του Έβρου τον Φεβρουάριο-Μάρτιο του 2020. Η Τουρκία, εν μέσω αυξανόμενων απωλειών στο μέτωπο του Ιντλίμπ και πολιτικής δυσαρέσκειας στο εσωτερικό, άνοιξε μονομερώς τα σύνορά της με την Ελλάδα, ενθαρρύνοντας και διευκολύνοντας τη μαζική μετακίνηση μεταναστών προς την Ευρωπαϊκή Ένωση. Η ενέργεια αυτή δεν στόχευε αποκλειστικά στην Ελλάδα, μιας και λειτούργησε κυρίως ως εργαλείο εσωτερικής συσπείρωσης και διεθνούς επικοινωνιακής αντιστροφής. Ο Ταγίπ Ερντογάν επιδίωξε να παρουσιάσει την Ελλάδα και την Ευρώπη ως ασυνεπείς, που υπερασπίζονται τα ανθρώπινα δικαιώματα επιλεκτικά, και να μετατοπίσει την εσωτερική συζήτηση μακριά από τις απώλειες του τουρκικού στρατού στη Συρία. Η κρίση στον Έβρο μετατράπηκε σε [σκληρή συμβολική αντιπαράθεση](#), με την Άγκυρα να αναδεικνύει τον ρόλο της ως προστάτιδας των [«ξεχασμένων προσφύγων»](#) και να επενδύει επικοινωνιακά στην καταγγελία της [«ευρωπαϊκής υποκρισίας»](#) σε ζητήματα μεταναστευτικής διαχείρισης. Η κάλυψη από τα τουρκικά μέσα ενημέρωσης πλειοδότησε σε εικόνες εγκαταλελειμμένων παιδιών και βίαιων επαναπροωθήσεων, ενισχύοντας ένα αφήγημα περί ηθικής ανωτερότητας της Τουρκίας έναντι της Δύσης.

¹ Σημείωση: Η παρούσα ενότητα βασίζεται σε ευρήματα και ανάλυση που αναπτύσσονται εκτενέστερα σε [πρόσφατα δημοσιευμένα ερευνητικά έργα του συγγραφέα](#).

Από την πλευρά της, η Ελλάδα ακολούθησε μια κυρίως συνεργατική προσέγγιση στη μεταναστευτική διπλωματία, ιδιαίτερα μετά το 2016. Αν και υπήρξαν φάσεις όπου η Αθήνα αξιοποίησε τη θέση της ως χώρα διέλευσης για να ενισχύσει τη διαπραγματευτική της ισχύ –[όπως κατά την αρχική περίοδο της προσφυγικής κρίσης του 2015](#)– η συνολική στρατηγική της ελληνικής πολιτείας κινήθηκε σε διαφορετική κατεύθυνση. Η Αθήνα επέλεξε να παρουσιάσει τη μετανάστευση ως κατ' εξοχήν ευρωπαϊκό ζήτημα, που απαιτεί συλλογική ευθύνη και θεσμικές απαντήσεις. Η διαχείριση των ροών εντάχθηκε, έτσι, στο πλαίσιο της διεθνούς συνεργασίας και ενίσχυσης της ευρωπαϊκής συνοχής. Η στάση αυτή ενσωμάτωνε στοιχεία διπλωματικής κεφαλαιοποίησης, με στόχο την εξασφάλιση πολιτικής και υλικής στήριξης, αλλά και την προβολή της Ελλάδας ως σταθερού και υπεύθυνου εταίρου στα εξωτερικά σύνορα της Ευρωπαϊκής Ένωσης.

Η κρίση του Έβρου το 2020 προσέφερε στην Αθήνα μια ευκαιρία για επικοινωνιακή και διπλωματική αναβάθμιση. Ενώ η Τουρκία κατηγορήθηκε διεθνώς για την ενορχήστρωση της κρίσης, η ελληνική κυβέρνηση παρουσίασε την αντίδρασή της ως πράξη θεσμικής υπευθυνότητας και αποτροπής. Στο εσωτερικό, το γεγονός αξιοποιήθηκε ως ένδειξη κρατικής αποφασιστικότητας και εθνικής ετοιμότητας, ενισχύοντας το αφήγημα περί «συνόρων που φυλάσσονται» – μια φράση που κυριάρχησε στον δημόσιο λόγο εκείνης της περιόδου. Παράλληλα, σε διμερές επίπεδο, η Ελλάδα υπογράμμισε την εργαλειοποίηση των μεταναστών από πλευράς της Τουρκίας, όχι μόνο ως απειλή για τη σταθερότητα, αλλά και ως παραβίαση των κανόνων καλής γειτονίας και του διεθνούς δικαίου. Η ελληνική μεταναστευτική διπλωματία, σε αντίθεση με την τουρκική εξαναγκαστική στρατηγική, δεν στηρίχθηκε στην απειλή ή την αποσταθεροποίηση. Αντιθέτως, επένδυσε στη θεσμική κανονικότητα, την προβλεψιμότητα και την ευθυγράμμιση με ευρωπαϊκές αξίες, προβάλλοντας τον [ρόλο της χώρας ως θεματοφύλακα συνοριακής ασφάλειας και ευρωπαϊκής συνοχής](#) – τόσο σε επίπεδο πολιτικής πράξης όσο και σε επίπεδο συμβολισμού. Η στρατηγική αυτή, παρότι περισσότερο συνεργατική, συνοδεύτηκε από [σημαντική ευρωπαϊκή χρηματοδότηση](#) και εντάσσεται σε ένα ευρύτερο πλαίσιο διαπραγματευτικής αξιοποίησης της γεωγραφικής θέσης της χώρας.

Προσοδοθηρία και ο Ρόλος της Ευρωπαϊκής Ένωσης

Η [προσοδοθηρία](#) (rent-seeking) αποτελεί έναν κρίσιμο μηχανισμό εντός της θεωρίας της μεταναστευτικής διπλωματίας, καθώς αναφέρεται στη στρατηγική επιδίωξη πολιτικών ή οικονομικών ανταλλαγμάτων από τρίτους δρώντες, συχνά πιο ισχυρούς, μέσω της διαχείρισης ή της πιεστικής μόχλευσης μεταναστευτικών ροών. Σε αντίθεση με τη διακρατική διαπραγμάτευση μεταξύ χωρών αποστολής, διέλευσης και υποδοχής, η προσοδοθηρία [εστιάζει στην εκμετάλλευση της γεωγραφικής θέσης και της πολιτικής συγκυρίας για την άντληση προσόδων](#). Ένα χαρακτηριστικό παράδειγμα αποτελεί η [περίπτωση της Τυνησίας](#) το 2023, όταν η κυβέρνηση του Καϊς Σαϊέντ υπέγραψε συμφωνία με την Ευρωπαϊκή Ένωση που περιλάμβανε χρηματοδότηση, τεχνική βοήθεια και υποσχέσεις ανάπτυξης, με αντάλλαγμα την [αυστηρότερη επιτήρηση των συνόρων και την αποτροπή μεταναστευτικών ροών](#) προς την Ιταλία. Η συμφωνία αυτή δεν βασίστηκε σε κοινές αρχές ή αξίες, αλλά σε μια σιωπηρή συναλλακτική λογική, όπου η μετανάστευση μετατράπηκε σε εργαλείο διαπραγμάτευσης και πρόσσδος εξωτερικής πολιτικής.

Η Τουρκία έχει [αξιοποιήσει την προσοδοθηρία ως εργαλείο μεταναστευτικής διπλωματίας](#) με συστηματικό τρόπο από το 2015 και εξής. Εκμεταλλευόμενη τη γεωγραφική της θέση ως χώρα διέλευσης προς την Ευρώπη, η Άγκυρα κατάφερε να μετατρέψει τη διαχείριση των μεταναστευτικών ροών σε διαπραγματευτικό πλεονέκτημα. Η Συμφωνία ΕΕ-Τουρκίας του Μαρτίου 2016 αποτελεί χαρακτηριστική έκφραση αυτής της στρατηγικής: η Τουρκία έλαβε οικονομική ενίσχυση άνω των έξι δισεκατομμυρίων ευρώ, μαζί με πολιτικά ανταλλάγματα όπως η επανεκκίνηση ενταξιακών διαπραγματεύσεων και η υπόσχεση για ελευθέρωση θεωρήσεων εισόδου στον χώρο Σένγκεν. Παράλληλα, η απειλή «ανοίγματος των συνόρων» καθιερώθηκε ως σταθερό διαπραγματευτικό χαρτί, χρησιμοποιούμενο τόσο απέναντι στην ΕΕ όσο και απέναντι στην Ελλάδα. Σε αυτή τη λογική, η Τουρκία ανέδειξε τη διαχείριση της μετανάστευσης όχι μόνο ως υποχρέωση, αλλά και ως πηγή γεωπολιτικής υπεραξίας, στη βάση ενός ξεκάθαρα ανταποδοτικού μοντέλου.

Η Ελλάδα, από την άλλη πλευρά, έχει υιοθετήσει μια [πιο θεσμική και προβλεπόμενη μορφή προσοδοθηρίας](#), εστιάζοντας στη νομιμοποίηση της στήριξης που λαμβάνει από την ΕΕ. Ως χώρα πρώτης εισόδου προσφύγων και μεταναστών στον ευρωπαϊκό χώρο, η Αθήνα έχει επανειλημμένως υπογραμμίσει την ανάγκη για ευρωπαϊκή αλληλεγγύη, με σκοπό την άντληση πόρων για τη διαχείριση των συνόρων, τη δημιουργία δομών υποδοχής και την επιχειρησιακή ενίσχυση μέσω της Frontex. Η στρατηγική της Ελλάδας δεν βασίζεται σε ρητές απειλές ή κρίσεις, αλλά στη θεσμική διεκδίκηση πόρων και πολιτικής στήριξης, προβάλλοντας το ρόλο της ως προμαχώνα της ΕΕ έναντι εξωτερικών απειλών. Επιπλέον, η Αθήνα ανέδειξε το ζήτημα της κατανομής ευθυνών μεταξύ των κρατών-μελών, διεκδικώντας συστήματα μετεγκατάστασης και ενίσχυση της ευρωπαϊκής συνοχής σε θέματα μετανάστευσης.

Η Ευρωπαϊκή Ένωση, ως [κομβικός αποδέκτης των στρατηγικών προσοδοθηρίας](#), καλείται να ισορροπήσει ανάμεσα σε αντικρουόμενες πιέσεις. Από τη μία πλευρά, αντιμετωπίζει εκβιαστικές πρακτικές από χώρες όπως η Τουρκία, οι οποίες αξιοποιούν τη μετανάστευση ως διαπραγματευτικό μοχλό. Από την άλλη, πρέπει να διατηρήσει την εσωτερική νομιμοποίηση και συνοχή, διαχειριζόμενη τις θεσμικές διεκδικήσεις κρατών-μελών όπως η Ελλάδα. Επιπλέον, μια τρίτη πρόκληση αναδύεται με την αυξανόμενη απροθυμία ορισμένων ευρωπαϊκών κυβερνήσεων να στηρίξουν πολιτικά ή οικονομικά τέτοιες συμφωνίες, θεωρώντας ότι ενισχύουν εξαρτήσεις ή μεταφέρουν το βάρος της διαχείρισης εκτός συνόρων χωρίς ουσιαστικές εγγυήσεις. Η τριπλή αυτή ένταση αποκαλύπτει τη δομική αδυναμία της ΕΕ να διαμορφώσει έναν συνεκτικό, προληπτικό μηχανισμό αντιμετώπισης της προσοδοθηρίας, είτε θεσμικής είτε εξαναγκαστικής. Σε αυτό το πλαίσιο, η μετανάστευση λειτουργεί ως [πολιτικό νόμισμα στην ευρωπαϊκή περιφέρεια](#), επιβεβαιώνοντας ότι η μεταναστευτική διπλωματία δεν περιορίζεται σε διμερείς σχέσεις, αλλά επεκτείνεται σε πολυεπίπεδα διακυβερνητικά πεδία διαπραγμάτευσης.

Συμπεράσματα και Προτάσεις Πολιτικής

Τον Η ανάλυση της ελληνοτουρκικής σχέσης μέσα από το πρίσμα της μεταναστευτικής διπλωματίας αναδεικνύει τη δυναμική ένταξης της ανθρώπινης κινητικότητας στον πυρήνα των γεωπολιτικών ανταγωνισμών. Η μετανάστευση δεν αποτελεί πλέον απλώς αντικείμενο κοινωνικής ή ανθρωπιστικής διαχείρισης· έχει μετατραπεί σε πολύπλευρο εργαλείο εξωτερικής πολιτικής, με σημαντικές επιπτώσεις για τη σταθερότητα, την ασφάλεια και τη διεθνή διαπραγμάτευση. Η περίπτωση της Τουρκίας καταδεικνύει τη χρήση εξαναγκαστικών στρατηγικών, τόσο προς την ΕΕ όσο και προς την Ελλάδα, με στόχο την απόσπαση πολιτικών και οικονομικών ανταλλαγμάτων. Αντιθέτως, η Ελλάδα έχει ακολουθήσει κυρίως θεσμικές και συνεργατικές πρακτικές, προβάλλοντας τη θέση της ως χώρα-κλειδί στην ευρωπαϊκή συνοριακή αρχιτεκτονική. Και οι δύο χώρες, ωστόσο, εμπλέκονται ενεργά σε προσοδοθηρικές πρακτικές, επιδιώκοντας να κεφαλαιοποιήσουν την ιδιαίτερη γεωγραφική και στρατηγική τους θέση. Η Ευρωπαϊκή Ένωση, ως βασικός αποδέκτης αυτών των στρατηγικών, βρίσκεται αντιμέτωπη με τη διάχυτη εργαλειοποίηση της μετανάστευσης από κράτη εντός και εκτός της θεσμικής της επικράτειας. Η απουσία συνοχής στην εξωτερική της πολιτική για τη μετανάστευση καθιστά την ΕΕ ευάλωτη σε πιέσεις και αναδεικνύει την ανάγκη για προληπτικά, μακροπρόθεσμα σχήματα διακυβέρνησης.

Η σημασία της μεταναστευτικής διπλωματίας υπερβαίνει πλέον το στενό πλαίσιο των ελληνοτουρκικών σχέσεων. Στη σημερινή συγκυρία, η Ανατολική Μεσόγειος αναδεικνύεται σε βασικό πεδίο πολυεπίπεδης διαπραγμάτευσης μεταναστευτικών ζητημάτων, με κράτη όπως η Αίγυπτος να αξιοποιούν τη θέση τους ως χώρες διέλευσης (transit states) για την ενίσχυση της γεωπολιτικής τους σημασίας. Η πρόσφατη [συμφωνία-πλαίσιο ύψους 7.4 δισεκατομμυρίων ευρώ μεταξύ ΕΕ και Αιγύπτου](#) αποτελεί ενδεικτικό παράδειγμα αυτής της δυναμικής: περιλαμβάνει σημαντικούς οικονομικούς πόρους και στοχευμένες ενισχύσεις, με αντάλλαγμα την αυξημένη συνεργασία στον έλεγχο των συνόρων και τη φιλοξενία μεταναστών και προσφύγων από το Σουδάν και άλλες περιοχές. Παράλληλα, το Κάιρο αντιμετωπίζει διεθνείς πιέσεις, [κυρίως από τις Ηνωμένες Πολιτείες](#), να αναλάβει ρόλο χώρας υποδοχής για Παλαιστίνιους εκτοπισμένους από τη Λωρίδα της Γάζας – μια πρόταση την οποία η αιγυπτιακή ηγεσία έχει [απορρίψει κατηγορηματικά](#), επικαλούμενη λόγους εθνικής κυριαρχίας και κινδύνους περιφερειακής αποσταθεροποίησης. Οι δύο αυτές περιπτώσεις, αν και διαφορετικές, καταδεικνύουν πώς η θεωρία της μεταναστευτικής διπλωματίας βρίσκει άμεση εφαρμογή στην πράξη, αναδεικνύοντας τη στρατηγική αξία της ανθρώπινης κινητικότητας για τα κράτη της περιοχής.

Την ίδια στιγμή, ο σταδιακός τερματισμός του εμφυλίου πολέμου στη Συρία επαναφέρει στο προσκήνιο το [ζήτημα των επιστροφών προσφύγων](#) από κράτη-υποδοχείς όπως η Ιορδανία, ο Λίβανος και η Τουρκία. Η επανεξέταση των όρων για την ασφαλή και εθελοντική επιστροφή εκατομμυρίων Σύρων αποτελεί [κρίσιμο πεδίο περιφερειακής διαπραγμάτευσης](#), το οποίο εμπλέκει όχι μόνο τις χώρες φιλοξενίας αλλά και διεθνείς οργανισμούς και δυνάμεις όπως η Ρωσία, το Ιράν και η ΕΕ. Για τα κράτη που φιλοξενούν επί χρόνια μεγάλους πληθυσμούς προσφύγων, η επιστροφή συνιστά αφενός μια ανθρωπιστική πρόκληση, αφετέρου ένα διαπραγματευτικό χαρτί προς την διεθνή κοινότητα, με στόχο την εξασφάλιση χρηματοδότησης, στήριξης υποδομών και γεωπολιτικής αναγνώρισης.

Σε αυτό το νέο τοπίο, η μεταναστευτική διπλωματία αποκτά εκ νέου στρατηγική σημασία για τη διαμόρφωση της μεταπολεμικής ισορροπίας στην Ανατολική Μεσόγειο. Καθώς η διαχείριση των επιστροφών και η αποτροπή νέων κυμάτων κινητικότητας τίθενται στο επίκεντρο, οι περιφερειακοί δρώντες επιδιώκουν να διαπραγματευθούν ρόλους και πόρους. Η Ελλάδα, στο πλαίσιο αυτό, καλείται να διευρύνει τη στρατηγική της ματιά πέραν του ελληνοτουρκικού άξονα, εντάσσοντας τη μετανάστευση σε μια πολυμερή, προνοητική και περιφερειακά ευαισθητοποιημένη εξωτερική πολιτική, ικανή να ανταποκριθεί στις εξελισσόμενες δυναμικές της περιοχής.

Προτάσεις Πολιτικής

Με βάση τα παραπάνω συμπεράσματα, καθίσταται σαφές ότι η μεταναστευτική διπλωματία δεν αποτελεί παροδικό φαινόμενο, αλλά διαμορφωτικό παράγοντα των διεθνών σχέσεων στην Ανατολική Μεσόγειο. Απαιτείται, επομένως, μια πιο στρατηγική, μακροπρόθεσμη και πολυεπίπεδη προσέγγιση, τόσο από την πλευρά της Ελλάδας όσο και από την Ευρωπαϊκή Ένωση. Οι ακόλουθες προτάσεις πολιτικής επιχειρούν να συμβάλουν προς αυτή την κατεύθυνση.

- Η Ελλάδα θα πρέπει να ενισχύσει την πολυεπίπεδη διπλωματία της στο πεδίο της μετανάστευσης, επεκτείνοντας το βλέμμα της πέραν της Τουρκίας και διαμορφώνοντας τριγωνικές σχέσεις με κράτη αποστολής και διέλευσης στην Ανατολική Μεσόγειο, όπως η Αίγυπτος και ο Λίβανος. Η ενεργή συμμετοχή σε διαπεριφερειακές πλατφόρμες μπορεί να ενισχύσει την ανθεκτικότητα της ελληνικής εξωτερικής πολιτικής απέναντι σε μελλοντικές πιέσεις.
- Η μεταναστευτική πολιτική πρέπει να ενσωματωθεί ρητά στη στρατηγική εθνικής ασφάλειας της Ελλάδας, με στόχο τη μακροπρόθεσμη πρόληψη κρίσεων και τη διατήρηση της ανθρωπιστικής νομιμοποίησης. Η συνοριακή ασφάλεια δεν μπορεί να αποσυνδεθεί από τον σεβασμό των δικαιωμάτων και των διεθνών δεσμεύσεων της χώρας.
- Η Ευρωπαϊκή Ένωση οφείλει να επαναξιολογήσει τη λογική προσοδοθηρίας που χαρακτηρίζει τις συμφωνίες της με γειτονικά κράτη – όπως φαίνεται στις περιπτώσεις της Τουρκίας, της Τυνησίας και, προσφάτως, της Αιγύπτου. Η απουσία ουσιαστικών μηχανισμών λογοδοσίας κινδυνεύει να ενισχύσει αυταρχικά καθεστώτα και να υπονομεύσει τις ίδιες τις θεμελιώδεις αξίες της ΕΕ.
- Η αυξανόμενη εργαλειοποίηση της ανθρώπινης κινητικότητας ενέχει σοβαρές προκλήσεις για τα ανθρώπινα δικαιώματα και το διεθνές ανθρωπιστικό δίκαιο. Η μετατροπή προσφύγων και μεταναστών σε διαπραγματευτικά εργαλεία υπονομεύει τόσο τις ζωές των ίδιων όσο και τα διεθνή πρότυπα προστασίας. Η Ελλάδα και η Ευρωπαϊκή Ένωση οφείλουν να διαμορφώσουν πολιτικές με διττή στόχευση: τη διασφάλιση της συνοριακής ασφάλειας και, ταυτόχρονα, τη διατήρηση των ανθρωπιστικών τους υποχρεώσεων. Η ενσωμάτωση ανθρωπιστικών αρχών στη μεταναστευτική διπλωματία δεν αποτελεί πολυτέλεια, αλλά προϋπόθεση θεσμικής αξιοπιστίας και μακροπρόθεσμης σταθερότητας.
- Ιδιαίτερη προσοχή απαιτείται απέναντι σε εξωτερικές παρεμβάσεις τρίτων χωρών, ιδίως από μη-ευρωπαϊκούς δρώντες όπως οι Ηνωμένες Πολιτείες. Η μεταναστευτική διπλωματία της Ουάσιγκτον, όπως εκδηλώνεται μέσω πιέσεων για μετεγκατάσταση Παλαιστινίων στην Αίγυπτο, κινδυνεύει να αποσταθεροποιήσει περιφερειακές ισορροπίες και να υπονομεύσει λύσεις τοπικής αυτοδιάθεσης, αντί να ενισχύσει τη σταθερότητα.
- Τέλος, απαιτείται η θεσμική θωράκιση της ίδιας της έννοιας της μεταναστευτικής διπλωματίας – ως αντικειμένου πολιτικής πρόβλεψης, στρατηγικού σχεδιασμού και διεθνούς συνεργασίας. Η ενίσχυση των ερευνητικών και διπλωματικών δυνατοτήτων της χώρας σε αυτόν τον τομέα μπορεί να αποδώσει πολλαπλάσια γεωπολιτικά οφέλη.

Rethinking Solutions: The Role of Third-Country Agreements in Europe's Migration Crisis

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Summary

In an effort to avoid a repeat of the 2015 migration crisis, European states are increasingly turning to third-country agreements, exemplified by the recent deal with Tunisia. This paper explores two central questions: How effective are third-country agreements in addressing the complex and persistent challenges of European migration, and why do European leaders continue to favor this policy approach? The paper argues that Europe's ongoing migration dilemmas stem from the inherently "wicked" nature of the crisis—one that defies simple solutions and requires policies that move beyond short-term deterrence logic. It assesses the policy's effectiveness in deterring irregular migration, its role in enabling migration weaponization, and its potential to generate hypocrisy costs. It posits that third-country agreements serve immediate political interests by offering the appearance of control and responsiveness. Ultimately, the success of such agreements depends on the analytical lens—while they may appear effective in the short term, they risk entrenching long-term failures, thereby reinforcing the intractability of the crisis.

Introduction

Europe's shortcomings in managing migration have been evident since the 2015 Syrian refugee crisis. Since then, the salience of migration for Europe has not abated, especially as illustrated by the recent 2024 European elections. The European struggle with migration, I argue, persists because of the inherently wicked character of the migration crisis, as illustrated by issues of border security and migration weaponization. Beyond illustrating the wicked character of the dynamic interplay of the aforementioned issues, the European case is particularly salient when evaluating a policy used as a common mitigating "solution" to the migration crisis: third-country agreements. These agreements come in different forms, but all agreements are a policy of externalization, which seeks to alleviate the wicked problem of border security by limiting the influx of refugees and asylum seekers through deterrence. I will conduct an evaluative policy analysis of these third-country agreements to answer two questions: First, how effective is the policy of third-country agreements in addressing the wickedness of the European migration crisis? Second, why is this policy so popular among European leaders?

Regarding the first question, I will evaluate the effectiveness of third-country agreements based on two criteria: Firstly, whether these agreements successfully achieve their primary aim of deterrence, and secondly, whether they adequately address the European migration crisis in the long run. I hypothesize that the policy of third-country agreements is ineffective on both grounds. These agreements, at best, deter refugees and asylum seekers aiming to enter European states only in the short run. Europe's deterrence-based approach to migration does not deal with its root causes, and even if some deterrence is produced, the costs incurred outweigh any positive effects of deterring migrants. Thus, the short run-long run paradox is at play, as the policy may lead to the short run benefit of reducing the number of irregular migrants, but this has exacerbated the possibility of long run failures. The most significant drawback of this policy is the weaponization of migration. That is, third-country partnerships grant the third countries disproportionate amounts of power, which can be used to weaponize migration. By mitigating border security issues, these agreements propel another wicked problem in the weaponization of migration. Lastly, these partnerships are ineffective due to hypocrisy costs for domestic and international actors. These agreements often violate human rights, contradicting the liberal ideals many European states promote. However, hypocrisy costs are the least significant drawback, as other states rarely impose them. For hypocrisy costs to significantly impact states, they must be imposed frequently, but they are primarily enforced by human rights organizations, which wield comparatively less influence than states. States seldom hold European states accountable for hypocrisy since they themselves are often guilty of similar policies. The absence of condemnation is also due to strong anti-immigrant sentiment in Europe, so domestic and regional actors are not concerned with states acting hypocritically if it means keeping migrants out.

For the second research question, I will employ a short run rather than a long run framework to display why the policy of third-country agreements is so popular among European leaders. I propose that European leaders are not ignorant that these agreements are only short-term solutions; in fact, this is part of the appeal of such a policy. These partnerships improve the optics of the proactiveness of states in dealing with migration challenges, accomplishing a sufficient temporary reduction in migration numbers. While they serve only as a temporary fix, states are willing to bear the costs of such measures, considering that the alternative—structural reform—poses a formidable obstacle, as such an approach would conflict with the short-term political motivations of leaders. Thus, leaders respond to a crisis-by-crisis approach instead of considering long-term solutions, which I posit produces an inability to address the wicked problems at play.

The European migration crisis embodying wicked problems

The framework of wicked problems was formulated by Horst Rittel and Melvin Webber by categorizing certain policy planning problems as “inherently wicked,” embodying ten characteristics.^[1] A wicked policy problem defies straightforward solutions due to its interconnectedness with other problems and a multiplicity of stakeholders with conflicting interests and values. The European migration crisis is interwoven by many wicked problems, such as border security, weaponization of migration, and poverty, thereby making the crisis wicked. The European migration crisis embodies many of the ten characteristics defining wicked problems. There are multiple conflicting values, as seen by the disagreement within the EU on migration. The crisis is difficult to define, as it mutates and changes over time, as seen by the difference now in 2024 with Ukrainian refugees compared to 2015 with Syrian refugees. There is no single root cause of the crisis’s complexity as it is interconnected with many other problems, such as poverty in origin countries, wars, and environmental degradation. The European migration crisis, in short, is more than a security problem. It is “a humanitarian crisis based in the suffering of individuals who [have] abandoned their homes; a geopolitical conflict ranging across countries and continents; a security threat for both receiving and transit countries; a potentially heavy financial burden on already overtaxed states; and the breakdown of collaboration in the network of EU member states.”^[2]

The wicked character of the European migration crisis points to the difficulty of solving the crisis, as we cannot even neatly define it. The solution to the crisis can never be right or wrong but good or bad. In this paper, I will argue that the policy of third-country partnerships falls into the “bad” category of solutions.^[3] However, this policy can be seen as “good” from the short-run perspective of political leaders - which incidentally adds to the wickedness of the problem, as perspective and incentives greatly influence evaluations of third-country agreements. The European migration crisis can never be solved entirely, as so many wicked problems are at play that, due to their nature, can never be fully answered. Even if push factors are weakened, several migrants will always want to enter Europe. Due to my focus on evaluating the policy of third-country agreements, I will focus on the wicked problems of border security and the weaponization of migration.

Explaining the policy of third-country agreements

Third-country agreements come in many different forms, but the overarching framework is that European destination countries use these agreements as an externalization policy to deter irregular migrants by either moving migrants to a safe third country or shifting the responsibility to transit countries to deal with asylum claims. This policy “has shifted beyond the state by both relocating the border outside the state’s territory (externalisation) and delegating border control functions to non-state and third-state actors (outsourcing).”^[4] Through third-country agreements, European states focus on shifting the burden to border states instead of burden-sharing. This policy may often come in the form of a safe third country agreement. This agreement transfers the responsibility of a state to process asylum claims to another state - a safe third country. A third country is considered safe if it respects the principle of non-refoulement and treats an asylum seeker in accordance with accepted international standards, such as obeying the Geneva Refugee Convention and Protocol.^[5]

An example of this policy being considered successful is Spain and Morocco’s transactional migration agreement.^[6] A form of a third-country agreement that many examples I discuss fall into is transactional forced migration. Adamson and Greenhill coined this term and define it as the process surrounding “political deals intended to facilitate and/or forestall engineered cross-border population movements, wherein the parties to the deal do not include the displaced themselves.”^[7] In the Spain-Morocco example, “Morocco is also cooperating with its neighbour Spain in efforts to stem the flow of illegal migration by sea with the attendant humanitarian concerns.”^[8] Another prominent example is the infamous EU-Turkey deal, where Greece could return new irregular migrants to Turkey in exchange for six billion euros in financial support for Turkey.^[9] One of the most extreme examples of this policy is the UK’s current Rwanda Plan, where “anyone entering the UK illegally - as well as those who have arrived illegally since 1 January 2022 - may now be relocated to Rwanda” even if they have never set foot in Rwanda, distinguishing it from the EU-Turkey deal.^[10]

Deterrence

To evaluate the effectiveness of the third-country agreement policy, I will first examine whether the policy fulfills its main objective - deterrence. The primary aim of the policy is to deter irregular migrants from entering European

states. For example, the goal of the UK's Rwanda Plan is to "stop the boats" and "deter dangerous and illegal journeys."^[11] The policy relies on the belief that people claiming to seek asylum in the UK will be deterred if they believe they will be sent to Rwanda. Similar logic applies to all third-country agreements, as European leaders think the threat of being sent away from a European state will deter irregular migrants from making the journey in the first place. However, this policy rarely provides a stable long-term deterrence effect. Many scholars agree that "there is limited evidence to suggest that the Rwanda deal will reduce the number of small boats crossing the Channel."^[12] One of the critical reasons this policy fails to provide deterrence is due to the limited enforcement of these agreements. For example, in 2015, the number of migrants arriving in Greece was approximately 885,386.^[13] The EU-Turkey deal was intended to curb this, but only 2,140 people have been returned from Greece to Turkey after the deal.^[14] This occurrence is not limited to the EU-Turkey deal, as "just 20 percent of eligible Dublin cases were actually transferred between EU Member States."^[15] Thus, transfer rates are low, and this is due to practical challenges, but also legal obstacles, as many European states are subject to EU and international law, which prevents them from rejecting asylum seekers.

Another reason why deterrence fails in the long run is because it underestimates asylum seekers' persistence and determination to flee from persecution in their home countries. Gammeltoft-Hansen and Tan state, "refugees remain resourceful despite the plight they are forced to endure, and may exhibit extraordinary resilience in their efforts to find safety and protection."^[16] For example, in the hope of finding safety in Europe, at least five people died in icy waters in January 2024 near northern France as they tried to traverse the English Channel to Britain.^[17] Asylum seekers have to decide whether it is best to stay home where they know they will face persecution or risk fleeing to European countries where it is not certain if they will be granted refugee status. If lethal violence is the main push factor, asylum seekers will not be easily deterred.^[18] The latter option is more appealing to asylum seekers, especially since European states have a reputation for not properly enforcing their deterrence measures. If the policy third-country agreements do not effectively secure their main aim, deterrence, then this questions if the policy truly ameliorates the wickedness of the European migration crisis.

Nonetheless, this policy at times succeeds in yielding the desired deterrence effect, albeit in the short run. Even though I questioned the EU-Turkey deal in achieving deterrence, it is undeniable that the numbers, albeit not significantly, went down when viewing irregular migration flows. The deal is seen as a success in European policy circles as it achieved its aim of deterring people in the short run.^[19] However, third-country agreements as a policy will not provide a sustainable or stable deterrence. The aspect of the EU-Turkey deal that contributed most to a decrease in flows was not safe third-country provisions but rather interceptions of migrant boats in the Aegean by the Turkish Coast Guard.^[20] According to the Turkish interior ministry, more than 79,000 migrants and refugees were intercepted attempting to cross into Greece during the first four months of 2019—dwarfing the number of people returned under the safe third country agreement.^[21] If deterrence is best achieved through deals that involve interceptions, this is far from a sustainable, long-term solution that appreciates the wickedness of the migration crisis.

Assuming deterrence is even effective under this policy, its efficacy is undermined if it does not adequately deal with the wicked problems interwoven in the European migration crisis. Gammeltoft-Hansen and Tan argue that "while specific deterrence measures may be successful in stemming a particular migration path in the short term...displacement of migration flows towards alternative routes often significantly, if not completely, undermine the effect over time."^[22] They cite the EU-Turkey deal as an example showing that while the number of asylum seekers decreased along the Balkan route, the number of refugees and migrants using the Central Mediterranean route via Egypt or Libya dramatically increased during the same period.^[23] Thus, by closing the Greek point of entry the policy did not effectively deter people as they simply found a new route to enter Europe, proving how unsustainable the policy is. Even the Spain-Morocco agreement, which is also viewed as a success, does not come close to dealing with the wickedness of migration. The moment Spain stops complying with Morocco's demands, the number of asylum seekers will instantly rise at the Spanish border. Already the EU's deal with Tunisia does not seem to provide a stable deterrent, as MEP Jeroen Lenaers of the European People's Party, has openly denounced lagging results as "arrivals continue to increase" after the conclusion of the deal.^[24] Not to mention the exorbitant costs countries face with this policy. For example, Italy had to pay Libya five billion dollars in 2007 in a negotiation regarding irregular migration.^[25] Currently, as of December 2023, the UK government has spent a total of £240 million to Rwanda, and more is planned to be sent on a yearly basis.^[26]

The policy of third-country agreements by European states wrongly focuses on one criterion: reducing numbers. Viewing the European migration crisis from the one problem-solving perspective of reducing numbers is a gross oversimplification of the complexity of the wicked problems at play. Wicked problems, due to their complex nature, cannot ever be fully solved, but there are better and worse ways to handle them. The wicked problem of border security in the European migration crisis requires policies that move beyond the logic of deterrence. The European migration crisis is a structural, long-term phenomenon that requires policies that transcend short-term objectives. The policy of third-country agreements is a crisis-by-crisis approach rooted in short run deterrence logic, which provides patchy results at best. Irregular migration to Europe will never entirely be stopped, but instead of trying to prevent migrants from coming through these agreements, European states should employ a more long run sustainable policy of addressing the root causes of irregular migration or focusing inwards on its asylum systems instead of outwards. As Moreno-Lax and Pedersen state, “The short-term European goal of preventing asylum seeker flows thereby risks compromising the stated long-term goal of tackling the root causes of displacement, which is sacrificed in the altar of externalised ‘integrated border management.’”^[27] Externalization policies are not new, despite each third-country agreement being presented as a new, innovative solution. Third-country agreements have existed for decades, and the European migration crisis still exists and is mutating in different forms, proving this deterrence-based policy did not adequately address the crisis or the wicked problem of border security.

Weaponization of migration

A key aspect of what makes wicked problems so complex is that attempted solutions “after being implemented, will generate waves of consequences over an extended -virtually an unbounded- period of time.”^[28] When evaluating a potential solution, in this case, a policy, I aim to determine if “the next day’s consequences of the solution may yield utterly undesirable repercussions which outweigh the intended advantages or the advantages accomplished hitherto.”^[29] I posit that the policy of third-country agreements in attempting to tackle the wicked problem of border security in the European migration crisis inadvertently creates another wicked problem: the weaponization of migration. Thus, by focusing on short-term deterrence logic this helps the probability of long- term failures, specifically migration weaponization.

Greenhill significantly elevated the discourse surrounding the issue of the weaponization of migration, emphasizing its pertinence as a wicked problem. She underscores the compelling incentives for states to “create, manipulate, or simply exploit migration crises, at least in part, to influence the behavior of target states.”^[30] Coercive engineered migration is pertinent to understanding the wicked problem of migration weaponization: “Cross-border population movements that are deliberately created or manipulated by state or non-state actors in order to induce political, military and/or economic concessions from a target state or states.”^[31] It is important in the context of the policy of third-country agreements that Greenhill asserts the incentives are particularly compelling for weak states, as they lack the recourse for traditional methods of influence.^[32] Thus, the threat of using migrants as weapons can be more effective than unsuccessfully attempting to extract concessions using military means.^[33] An infamous example of coercive engineered migration was in 2004 when the then leader of Libya, Muammar Gaddafi, threatened the EU to lift remaining sanctions and financially assist Libya in exchange for cooperation on the migration issue.^[34]

I will now show the connection between the policy of third-country agreements and the wicked problem of weaponization of migration. Third-country agreements as a policy are ineffective in addressing the wickedness of the European migration crisis as they grant the third countries disproportionate amounts of power, which can be used to weaponize migration. For example, Libya has been weaponizing or threatening to weaponize migration against Italy and the EU since 2004. In 2008, Italy and Libya signed a migration deal, in which Italy agreed to pay Libya five billion dollars to stop the flow of African migrants to Europe.^[35] This deal gave Libya’s leader, Gaddafi, considerable leverage as in 2010, he threatened to “turn Europe black” if the EU did not comply with his demands, such as lifting arms sanctions and providing aid.^[36] Additionally, during the 2011 Arab Spring, Gaddafi tried to deter the EU from providing support to the rebellion by warning the EU would be “bombing a wall which stood in the way of African migration to Europe.”^[37] Per Greenhill’s theory, Gaddafi acted as a generator as he threatened to create cross-border population movements unless the EU complied with his demands.^[38] However, Libya has acted as an opportunist as well, proving that third-country agreements can promote distinct types of challengers. Despite Libya’s threats, Italy did not learn its lesson as the two nations signed a Memorandum of Understanding (MoU) on Migration with Libya in 2017. Italy provides Libya with financial support to prevent irregular migration to Europe by intercepting migrants at sea, establishing temporary refuge within its borders to screen asylum seekers, and repatriating individuals willing to return to their countries of origin. The EU has also financially assisted Libya, allocating 57.2

million euros for “Integrated Border and Migration Management in Libya” since 2017.^[39] Libya capitalized on Europe’s migration crisis in 2015 by negotiating this deal following the blueprint set out by the EU-Turkey deal. Thus, according to Greenhill’s theory, Libya acted as an opportunist as it did not create the migration crisis but carefully exploited it for its own gain.^[40] As Greenhill states, “a crisis can help level the playing field, enhance the credibility of weak actors, increase the potency of their threats, and thereby improve their coercive capabilities.”^[41] Another notable threat was from Erdogan during the EU-Turkey deal, as he threatened to “open the gates and send 3.6 million refugees your way” if the EU did not stop calling his Syrian offensive “an invasion.”^[42]

The problem with the policy of third-country agreements is that the third countries are aware of Europe’s struggle to deal with migration, so they can exploit Europe’s weakness and keep asking for concessions. Turkey knew it had the upper hand during negotiations with the EU and did not just ask for money but also political concessions, such as making the EU reopen talks about Turkish EU membership. Thus, I take it as far as to say no partnership is safe from the threat of coercive engineered migration. Even the Spain-Morocco partnership, which is seen as a policy success, has been subject to the weaponization of migration. This was seen in 2021, as Morocco acted as a generator by threatening Spain there would be “consequences” after the leader of the Polisario Front, Brahim Ghali, who is subject to a Moroccan arrest warrant for terrorist acts, was admitted for treatment in a Spanish hospital.^[43] Morocco weaponized migration by letting down its guard on the border with Ceuta, which allowed thousands of migrants to enter Spain. Thus, the short run benefit of reducing the numbers of irregular migrants to Spain caused the long run problem of migration weaponization, which is a problem Spain has been facing for years and will continue to do so under this policy.

Another example was in 2022, Morocco shifted Spain’s Western Sahara policy by creating a border crisis.^[44] This is an example of exportive engineered migration, as Morocco engineered migration to fortify a domestic political position.^[45] Thus, despite the partnership between the two nations spanning decades, this failed to deter Morocco from using migrants as an instrument to exert pressure on Spain. Spain and Morocco will continue to perpetuate the same pattern of engagement as they have done since the late 1990s, so Spain will always have to comply with Moroccan demands to curb irregular migration flows. In 2015, countries such as Egypt, Jordan, and Lebanon tangentially benefitted from the post-2015 European fear, allowing them to negotiate migration deals without threatening refugee arrivals due to European trauma.^[46] It may not be 2015, but Europe will continue to expect migration crises, as seen since the influx of Ukrainians refugees and predictions of future migration due to climate change.

European states must decide what wicked problem they want to prioritize. The policy of third-country agreements may address the wicked problem of border security, albeit I argue not effectively, but it further propels and ignites the wicked problem of weaponization of migration. Looking at the numbers, it is undeniable that the Spain-Morocco partnership reduced the number of irregular migrants entering Spain. However, the question is: how sustainable is this deterrence effect, and is the cost of potential weaponization worth it? I have argued that this deterrence effect is far from sustainable, and if an over-30-year partnership is susceptible to weaponization, then all partnerships are under threat. Thus, the EU-Tunisia MOU is also under threat of weaponization of migration, and so is the UK vis a vis Rwanda. Already, Tunisia is wielding significant power against the EU as in October 2023, Tunisian president Kais Saied rejected financial support from the EU, claiming the money “was a small amount,” and Saied was unsatisfied that the EU “lacks respect.”^[47] The European Commission said it would disburse 127 million euros to Tunisia as part of their deal to curb illegal immigration to Europe.^[48] However, rejected what the EU announced, saying that “the proposal conflicts with the memorandum of understanding signed in July.”^[49] The July deal included a pledge of 1 billion euros in aid to Tunisia. During the dispute between the two parties, a record number of migrants arrived on the Italian island of Lampedusa from Tunisia and North Africa.^[50] However, migrant numbers have been rising in many places in Europe, but I still question if this was a coincidence and is potentially proof of Tunisia weaponizing migration against the EU. Thus, Tunisia would not have been able to weaponize migration as easily against the EU and extract financial concessions without the third-country agreement between them. The agreement increased Tunisia’s legitimacy on the negotiating table by giving Tunisia a platform to increase its power in migration diplomacy. Hence, threats to alter or suspend third-country agreements in response to political disagreements or disputes can create a dynamic where migration becomes a tool for exerting influence. Due to geographical limitations, Rwanda may not directly weaponize migration by sending migrants to the UK. Still, it has the power to cause instability in the region and potentially threaten the UK. The weaponization of migration should not be underestimated, and I argue that the policy of third-country agreements is ineffective due to underestimating the

power of migration weaponization that it is facilitating. As Greenhill's research shows, coercers achieved at least some of their objectives in about three-quarters of the cases. In more than half the cases, coercers obtained all or most of what they sought."^[51]

Hypocrisy costs

Another significant cost of the policy of third-country agreements is hypocrisy costs. Greenhill defines hypocrisy costs as "those symbolic political costs that can be imposed when there exists a real or perceived disparity between a professed commitment to liberal values and norms and demonstrated actions that contravene such a commitment."^[52] Third-country agreements often violate human rights, contradicting the liberal democratic ideals many European states promote. However, I previously argued that the policy fails to provide an effective deterrence effect, as although European states want to keep migrants out, states rarely send many migrants back due to legal constraints. Nonetheless, just because European states are constrained by international law does not mean they do not incur hypocrisy costs. In fact, this policy creates a lose-lose situation: if the European state fails to keep unwanted immigration out, it fails the policy's original aim of deterrence. However, if European states do manage to keep migrants out, this is usually a result of illiberal means, potentially incurring hypocrisy costs. Thus, I want to ensure that I do not appear contradictory by introducing the drawback of hypocrisy costs to the policy, as even if deterrence is not effective, hypocrisy costs may still be incurred because human rights organizations have criticized European states for making deals with authoritarian leaders.

Hathaway argues that the right of states to remove refugees is conditional if the safe third country implements and respects the rights of the refugee under the Refugee Convention or any other legal instruments it is subject to.^[53] I use Hathaway's formulation of the expectations of safe third countries and the principle of non-refoulement as a baseline to determine if third-country agreements have abided by human rights expectations. For example, the EU-Turkey deal rested on the notion that Turkey is a safe third country. However, Turkey's safe third-country status has been questioned, mainly due to the surge in Turkish state violence against minorities since 2017.^[54] Greek courts in early 2018 found that Turkey was not a safe third country, delaying the number of migrants that could be sent back.^[55] Thus, the deal was ineffective in offering sustainable deterrence and displayed hypocritical behavior. Hypocrisy costs were incurred as, the Greek national court, not just human rights organizations, condemned state behavior for human rights, thereby highlighting the discrepancy between the liberal values European states must obey by law versus the restrictive agenda leaders want to pursue. The UK's Rwanda Plan is an even more extreme example, as the UK's Supreme Court has declared the policy unlawful, and the European Court of Human Rights has also prevented the first scheduled flight taking asylum seekers to Rwanda.^[56] The policy also goes against the principles of non-refoulement due to the severe risk asylum seekers would be returned to their home countries from Rwanda.^[57] Instead of listening to the Supreme Court, the government tried to create legislation to enforce its Rwanda plan. Thus, the Rwanda Plan is a policy that incurred huge hypocrisy costs, as both domestically and internationally the government was being rebuked. The UK is one of the leading proponents of liberal democracies globally, yet this policy goes against the values it espouses.

The MoU between Libya and Italy is laden with human rights abuses. Firstly, Libya is not a party to the UN Refugee Convention and its Protocol, which already raises legal and ethical questions about whether migrants should be sent to Libya from Italy. UNHCR expressed concern, stating "it is far from clear that Italy has taken the necessary precautions to ensure that it is not sending back any bona fide refugees to Libya, which cannot be considered a safe country of asylum."^[58] Additionally, UNHCR stated that refugees being removed from Libya to their country of origin violate the principle of non-refoulement.^[59] Both Italy and the EU have provided technical and financial support to Libya to stop migration flows to Europe, but a UN report states the migrants that are intercepted at sea and sent back face "murder, enforced disappearance, torture, enslavement, sexual violence, rape, and other inhumane acts ... in connection with their arbitrary detention."^[60] Similarly, an ICC prosecutor stated crimes against migrants in Libya "may constitute crimes against humanity and war crimes."^[61] Human rights organizations such as Human Rights Watch have argued that the EU and Italy are thus complicit in such crimes.^[62] Hence, the Libya case study is a salient example of exposing the hypocrisy displayed by European leaders, as "the anxiety over a refugee invasion from Africa reveals the contradictions present in Europe today, where, on the one hand, the moral imperative of universal emancipation is proclaimed, but on the other, policies and practice continue the trend of refusing a safe haven to the very refugees they have helped to create."^[63] Beyond the case of Libya, the EU is facing scrutiny for atrocious human rights abuses in Tunisia by EU funded security forces.^[64]

Hence, European states are seen as hypocritical as they advocate for human rights protection on the world stage yet are knowingly putting migrants in a situation where their rights are violated. Moreno-Lax and Pederson argue that “EU border externalization entrenches forms of undemocratic governance in third countries, empowering undemocratic actors, transforming their relative weight within domestic structures, and weakening democratic channels of scrutiny, accountability, and power control.”^[65] Hence, the EU may espouse democratic values and condemn authoritarianism, but concerning migration, they are more than willing to shift the responsibility to third countries and embolden their undemocratic, illiberal practices to keep migration out of Fortress Europe. As stated by Galeotti, European states are “underscoring a fundamental point, that authoritarian regimes can get not only a free pass from the EU on many issues but also lucrative assistance, so long as they continue to keep migrants out.”^[66]

Nonetheless, I argue that hypocrisy costs are a less significant drawback of the policy than other drawbacks, such as the weaponization of migration. My reasoning is based on strong anti-immigrant sentiment in the countries where this policy is used. For example, data by Pew suggests that “Greeks and Italians are also the most likely to be concerned about immigration from outside the EU (84% and 76%, respectively, are concerned about this).”^[67] I am not arguing that European states are predominantly anti-immigrant, but rather that anti-refugee/migrant camps in European states are strong and current populist governments in Europe feed on anti-immigrant sentiment. Migration has moved from low politics to high politics and is now at the center of many political debates.^[68] The Leave campaign during Brexit attributes its success partially due to exploiting xenophobic views in British society when it came to migration.^[69] As stated by Greenhill, “popular political discourses within the EU draw upon traditional nationalistic sentiments and xenophobic assertions that current waves of migrants and refugees reduce national living standards by siphoning away social resources from ‘real’ citizens, taking employment away from more qualified applicants, bringing tensions from their home state with them and committing a disproportionate amount of crime.”^[70] Thus, it is irrelevant if migrants pose a real threat, but “if they are perceived as fundamentally threatening to their security, culture or livelihood, anxious and motivated individuals and groups will mobilize to oppose their acceptance.”^[71] Thus, due to migrant opposition, hypocrisy costs are less of a drawback to the policy of third-country agreements as many European citizens, particularly those who border the Mediterranean, are not concerned with migrant rights or if states are being hypocritical, so it is less likely the cost will be imposed.

Likewise, while European states are acting hypocritically, it does not mean hypocrisy costs are incurred. For the cost to be incurred, another actor needs to condemn the state for displaying hypocritical behavior. However, this policy is used globally from the US to Australia, thereby shielding European states from hypocrisy costs as many states themselves engage in the same behavior. Thus, it is usually human rights groups that condemn European states for their hypocritical behavior, which holds less weight compared to if another state did the same.

Examining the popularity of the policy among European leaders

This paper has primarily focused on evaluating the effectiveness of third-country agreements and concluding that the policy fails to address the wicked problem of border security and, in turn, creates significant drawbacks, such as the wicked problem of weaponization of migration and hypocrisy costs. Thus, this raises the question why the policy is so widespread in Europe. Thus far, my analysis has been centered on a long run perspective that aims to address the wickedness of the crisis. I assumed the European migration crisis is a long-term structural phenomenon; thereby, my evaluation of the policy of third-country agreements is predicated on a long run rather than a short run analysis. For this section, I am viewing the policy from the eyes of the European leaders who created and implemented the policy. Hence, I will now view the policy from a short run perspective, as the actors involved are short-term political actors.

In essence, governments focus on the short term, as democratic countries are all plagued by short-termism. Offe argues in *Europe Entrapped* that democratically elected governments cannot address the structural issues afflicting the European Union because citizens are focused on the short-term, stating “the problem is one of ‘time inconsistency’: The implementation of promising long-term strategies is obstructed by the failure of ‘presentist’ electorates fixated on a short-term time horizon to grant them green light, unless political leaders can persuade their constituencies to adopt a more far-sighted perspective.”^[72] Thus, due to how democracies are structured, it is not politically palatable to campaign on long-term strategies. Politicians’ primary goal is to get elected and to stay in power, so when it comes to migration management, politicians are not incentivized to devise policies focused on a long-term perspective on migration that addresses structural and wicked problems. As Streeck puts it, “long-term solutions are not even attempted because short-term problems take priority; holes keep appearing that can only be

plugged by making new holes elsewhere.”^[73] In the case of the policy of third-country agreements, the “new holes” are the wicked problem of migration weaponization.

I will now examine the statements of European leaders to showcase how short-term political perspectives connect with the externalization policy of third-country agreements. Meloni states in regard to her support of the MoU with Tunisia that “work[ing] on the external dimension and stop[ping] the illegal departures of immigrants” is “the only way to seriously address the problem.”^[74] She continues, “this is what European citizens are asking of us.”^[75] Thus, European leaders recognize that citizens want solutions, and leaders believe third-country agreements can yield short-term tangible results. Von der Leyen echoes Meloni, stating that “irregular migration is a European challenge” that “needs a European answer.”^[76] This European answer is not dramatic structural reform on fixing Europe’s asylum systems or improving legal pathways to residency or citizenship. Instead, externalization persists as the preferred approach and will likely remain so: “We want our agreement with Tunisia to be a template. A blueprint for the future. For partnerships with other countries in the region.”^[77] The UK is following suit, as Sunak states, “In order to fully solve this problem, we need a deterrent. We need to be able to say pretty simply and unequivocally that if you come to our country illegally, you won’t get to stay.”^[78] For European leaders, “an immediate reduction in irregular arrivals is sufficient for a deal to be considered successful, and a partner country to be cooperative and effective.”^[79] Thus, while I criticize the EU-Turkey deal and the Italy-Libya partnership, in EU circles, these deals are considered a success when viewed merely from the lens of a short-term number.

Thus, depending on what lens you evaluate the policy it is possible to view it as a success, which adds to the wickedness. These deals manage to decrease numbers, albeit for a short period. According to figures provided by the Italian government, between 5 May and 31 December 2009, 3,185 migrants landed on Italian coasts, compared with 31,281 over the same period in 2008.^[80] Other factors besides the Italy-Libya agreement affected the numbers, but it is undeniable that the agreement played an important role. In large part, though, this reduction was not due to migrants being deterred but because they were intercepted at sea and returned to Libya. Nonetheless, now Italy is facing the same problem it did back in 2023, but instead of Libya being the main partner, now it is Tunisia. It is the same story but slightly different characters, as European leaders use the same policy of third-country agreements as a temporary band-aid to reduce numbers. As Hansen states, “‘root cause’ approaches are often eclipsed by the more ‘instant impact’ control policies.”^[81]

European leaders are not ignorant that the policy of third-country agreements is a short-term solution. The crisis-by-crisis approach is more politically appealing than undergoing structural reform. As previously stated, migration has moved from low politics to high politics. Polling suggests that migration will be a central issue in the upcoming June 2024 elections, where it is predicted right-wing, anti-immigrant parties will significantly benefit.^[82] Thus, since migration is now, at times, the center of political discussions, European leaders must look at least optically that they are addressing the issue. As stated previously, European citizens, particularly those who border the Mediterranean, are not open to refugees and asylum seekers. Not only are they not open, but European citizens are very biased, and “pundits, politicians and even some policy makers may argue that migrants who are from different religious, linguistic and ethnic backgrounds than the majority in their newly adopted homelands are a danger to societal security.”^[83] For instance, during the 2015 migration crisis, a median of 59% across 10 EU countries voiced concern about the prospect of increased terrorism, and 50% believed refugees are a burden to society because they take jobs and social benefits that would otherwise be available to citizens of each nation.^[84] Mediterranean states saw refugees from Syria and Iraq as a major threat: 69% of Greece and 65% of Italy.^[85] Pew also concluded that negative views towards refugees are tied to negative views about Muslims.^[86] Thus, this explains why Ukrainian refugees in 2022 were more welcome than Syrians in 2015.

Thus, the refugees and asylum seekers are not always viewed as people in desperate need of protection but as a national liability infringing on cultural identity and economic opportunities. European leaders, instead of trying to change the perceived negative image of migrants, capitalize on this xenophobic sentiment and use it to justify their externalization policies. Most importantly, these policies, such as third-country agreements, do not need to accomplish much. A short-term reduction in numbers will suffice. Overwhelmingly, regardless of one’s position regarding refugees, most Europeans believed that the EU did a poor job in handling the 2015 refugee crisis. This includes a staggering 94% of Greeks and 88% of Swedes.^[87] Disapproval was high among many segments of society but exceptionally high among people with favorable views of the anti-immigrant parties in Britain (UK Independence Party), Germany (Alternative for Germany), and the Netherlands (Party for Freedom).^[88] Thus,

European leaders recognize now that, at least optically, they need to show they are taking a hard line on migration to assure the public there will not be a repeat of 2015. This is why the policy of third-country agreements is so appealing: politicians need a fast reduction in numbers, and it does not matter if it's not sustainable. More sustainable policies addressing the problem's wickedness, such as expanding legal channels for migrants to access the EU's labor market, are not as politically desirable as the immediate impact of third-country agreements.

If the policy of third-country agreements is more about optics than about effectively dealing with the European migration crisis, this begs the question of whether the policy is an instrument of political theater. To properly answer this question, more time and research need to be dedicated beyond what this paper can offer, but I want to briefly touch on it as it pertains to my second research question, which is why European leaders implement this policy. In his book *Border Games*, Andreas outlines in Chapter 1 his thesis of border enforcement as political theater.^[89] The book focuses on the US-Mexico border, but Andreas describes the border as a "political stage" that can also apply to the European context.^[90] In essence, what Andreas means by political theater is that actors enforce certain policies not because of their practical effectiveness but for their symbolic significance. Thus, the policy of third-country agreements is not just to prevent migrants from coming to Europe but also to send a message to the public about the government's commitment to border security. If we assume the policy of third-country agreements is more about optics, then this explains why leaders care less about incurring hypocrisy costs. If this policy is "for show," then it does not matter how effective the policy is. It only matters if the public believes their leaders are doing something about combating the migration crisis. For instance, is the Rwanda Plan a product of political theater, or is it about creating an effective policy to deal with irregular migration in the UK?

Conclusion

Thus, by viewing the European migration crisis as a microcosm of a wicked problem or as a wicked problem itself, I determined that the policy of third-country agreements fails to treat the crisis as the long-term structural issue it is. The policy is a product of short run reasoning which fails to address the wickedness of the crisis. Most of my paper viewed the European migration crisis as a complex problem that begets policies that transcend the logic of deterrence. Firstly, I evaluated the policy's effectiveness on its intended aim of deterrence and concluded that third-country agreements do not provide a sustainable, long-term deterrent effect. The policy deters migrants only in the short run, and even then, results are patchy at best, as seen by the small number of migrants returned from Greece to Turkey under the EU-Turkey deal. Next, I assert that the policy of third-country agreements in trying to address the wicked problem of border security exacerbates the wicked problem of weaponization of migration. I argue that this is the most critical drawback of the policy, as migration weaponization should not be underestimated, and its wickedness entails a whole host of other problems. Migration weaponization is also a notable example portraying how short run deterrence logics leads to creating a bigger problem in the long run. Lastly, I argue that the policy incurs hypocrisy costs but argue that this drawback is less significant compared to the weaponization of migration due to anti-immigrant sentiment in Europe overriding human rights concerns at times.

For my second research question, my analysis was rooted in short run rather than long run logic, as I viewed the policy from the perspective of the leaders who implement these agreements. I concluded that the policy fulfills the short-term political aims of the politicians implementing the policy. European leaders need to look optically that they are being proactive in tackling migration crises and need to curb migration flows, albeit for a limited period. Thus, the policy of third-country agreements is seen as a politically effective solution as politicians are not aiming at adequately addressing the wicked problems at play but rather putting a band aid over the problem as by the time the problem resurfaces, another political actor will need to deal with it. Through my analysis of political leaders, I infer that what makes the crisis increasingly wicked is that depending what lens you employ -short run or long run- the success of the policy is evaluated differently.

Recent developments with the EU's MoU with Tunisia show that this policy appears to be here to stay. The deal with Tunisia already is displaying issues of weaponized migration and hypocrisy costs. Moving beyond the logic of deterrence will be a challenge, but it is the only way to tackle the wickedness of the European migration crisis. Complex problems need innovative solutions, and Europe needs to choose how it wants to deal with a recurring policy crisis. It remains to be seen how the new EU Migration and Asylum Pact will play out and what this means for the policy of third-country agreements, but unless Europe shifts its mindset to the long run, then these wicked problems will only resurface.

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Temporary Guests or City Residents? Governing Migrant Inclusion in Athens amid Political Dependence and Structural Barriers

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Summary

This policy brief examines Athens' approach to migrant inclusion within Greece's highly centralised governance system. It finds that the municipality lacks clear mandates and stable funding for migrant integration. The local authority tends to treat migrants as temporary guests rather than long-term residents. Migrant policies remain fragmented, reactive, and short-term, largely shaped by shifting political leadership. Civil society and migrant communities play an important yet mostly symbolic role, with limited participation in decision-making. Sustainable inclusion requires institutionalised responsibilities, multi-annual funding, and stronger participatory mechanisms to ensure policy continuity and protect progress from political change.

Introduction

Historically a country of emigration, Greece's approach to immigration has consistently been characterised by exclusion and hostility, driven by the foundational principles of ethnic and religious homogeneity, a weak formal economy, and the politicisation of migration^[1]. Greece is one of the most centralised countries within the OECD, together with Ireland, Chile, and New Zealand^[2]. As Greece's capital and largest urban centre, Athens has long served as a key entry point to the European Union and a major hub for migrants.

In Athens, the municipality tends to approach migrants as temporary visitors: their presence is tolerated but not actively supported through long-term inclusion strategies.

Drawing from document analysis and interviews, this policy brief analyses ***Athens' approach to migrant inclusion*** and offers actionable recommendations to strengthen local governance capacity and promote sustainable, inclusive migrant policies. The analysis is based on 12 semi-structured interviews with municipal officials, civil society representatives, and migrant organisations, conducted between May 2022 and July 2023, and on a review of national, regional, and municipal policy and legal documents. These materials include key migration and citizenship laws, national and regional integration strategies, Athens' municipal integration plan and reports, as well as NGO reports. In Athens, the municipality tends to approach migrants as temporary visitors: their presence is tolerated but not actively supported through long-term inclusion strategies. Services tend to address immediate needs rather than promote integration, and local policies often change depending on the priorities of the current municipal leadership^[3].

These short-term service responses reflect the city's dependence on shifting political priorities and the absence of institutional safeguards that ensure policy continuity. Athens' experience illustrates how even within centralised states, local political leadership can influence migration governance, yet over-reliance on political will renders policies vulnerable to change. To move beyond short-term and fragmented responses, Athens must institutionalise inclusion mechanisms and build sustainable collaborations with civil society and migrant communities. Athens' experience offers lessons for other cities operating under centralised national frameworks—including Dublin^[4]—highlighting both the constraints and opportunities of local governance in promoting migrant inclusion.

Context

Greece has a highly centralised governance system, with the national government retaining control over legislation, funding, and key integration frameworks.

Greece has a highly centralised governance system, with the national government retaining control over legislation, funding, and key integration frameworks. Over the past decade, national policy has oscillated between crisis response, securitisation, and selective inclusion, reflecting the highly politicised nature of migration in the country^[5]. Municipalities have limited autonomy and fiscal capacity. While Athens' status as the capital and largest municipality has, at times, positioned it as a key counterpart in discussions with national authorities, its ability to shape and sustain long-term migrant inclusion strategies remains limited by its structural dependence on the central government.

Athens lacks stable, institutionalised mechanisms for migrant inclusion.

Within this framework, Athens operates under poorly defined municipal responsibilities and heavy financial dependence on the central government. Despite its size and strategic role as both an arrival and transit city—where, according to the 2011 census, non-Greek nationals accounted for 22.8% of the population^[6]—Athens lacks stable, institutionalised mechanisms for migrant inclusion. The proportion of migrants in the city is likely higher today, reflecting continued migration to Greece and the city since 2011. Yet, local authorities remain neither legally mandated nor financially supported to engage in migrant integration, leaving municipal action discretionary and shaped by shifting political priorities, as discussed in the next section.

Political Will and Policy Fluctuations

For decades, Athens largely mirrored national policy by neglecting the presence and needs of migrants. However, shifts in municipal leadership, particularly between 2011 and 2019, created space for more progressive policies. During this period, the city introduced several notable initiatives, including the appointment of a Deputy Mayor for Migration, the creation of the Department for the Support and Social Inclusion of Migrants and Refugees, the establishment of advisory and service structures such as the Migrant Integration Council (MIC) and the Migrant Integration Centre (KEM^[7]), and the development of Greece's first local integration strategy. Collaboration with civil society organisations and other municipalities led to the creation of coordination structures like the Athens Coordination Centre for Migrant and Refugee Issues (ACCMR)^[8] and the Cities Network for Integration (CNI)^[9].

Athens also engaged in a range of integration projects, including the establishment of the Elaionas refugee camp and the development of EU-funded housing programmes coupled with integration services, such as ESTIA, Welcommon, and Curing the Limbo developed in partnership with NGOs and international organisations. Participation in European and international initiatives, such as '100 Resilient Cities', EUROCITIES, Solidarity Cities, and the European Coalition of Cities Against Racism, further supported these efforts, providing access to expertise, resources, and policy exchange. While these initiatives largely focused on asylum seekers and beneficiaries of international protection, with broader migrant populations receiving less targeted attention, they nonetheless marked a significant step forward. This period of activity was facilitated by EU funding, international support, collaboration with civil society actors which contributed resources, knowledge, and service infrastructure. A relatively more supportive national policy environment during these years also helped enable municipal initiatives.

...political will can, to some extent, compensate for structural limitations in Greece's centralised governance system.

Crucially, the role of local political leadership was central in advancing these developments, demonstrating how political will can, to some extent, compensate for structural limitations in Greece's centralised governance system. However, this reliance also introduced significant vulnerabilities. Following the 2019 municipal elections, Athens shifted towards a more reactive and limited approach to migration. The dedicated Deputy Mayor position was downgraded to a special advisor, key services were reduced, collaboration with civil society actors weakened, and the municipality withdrew from several international networks. Partnerships and projects were disrupted, and service provision delayed or halted, highlighting how over-reliance on political leadership undermines policy continuity and stability.

But the municipal authority changed, and then the way the program was dealt with changed a lot. I mean, when the municipal authority changed, we had a big problem for a year...The program was intended to last for three years, so losing a year and losing the Municipality's support for a year is very serious. Especially [since] this happened when...implementation [was just starting]...

Expert3, 2023, interview, 06 July

When the municipal authority changes, so does the policy towards immigration...the staff members do not stay; they are usually relocated. This is what happens in Greece, and that is the big problem that everyone, depending on their...party affiliation, finds themselves in a [job] position, and that is the big challenge we have

Greek Forum for Migrants (GFM), 2022, interview, 13 October

Athens' experience highlights the risks of over-relying on political will to sustain migrant inclusion policies. With politically appointed officials controlling key municipal positions, policy continuity remains vulnerable to electoral shifts. Migrants' exclusion from local voting rights further weakens their political influence, reducing incentives for

sustained investment in inclusion policies. While local political leadership can act as a catalyst for progressive change, Athens' experience demonstrates that without institutional safeguards, these gains remain fragile and easily reversible.

The 'Pragmatic Guest-Resident' Paradigm

Responses tend to be 'reactive', addressing immediate needs during moments of, whether perceived or real, crises, rather than developing sustained inclusion policies.

Discussing a consistent policy paradigm in Athens is challenging as priorities fluctuate with changes in 'political will'. Nevertheless, the city appears to have evolved from a 'non-policy' phase to what might be described as a 'pragmatic guest-resident'^[10] approach. In this model, migrants are viewed as temporary visitors whose presence is tolerated but not structurally supported. Responses tend to be 'reactive'^[11], addressing immediate needs during moments of, whether perceived or real, crises (e.g. the 2015 migration, Covid 19 pandemic), rather than developing sustained inclusion policies.

Service delivery under this approach remains fragmented and project-based (projectisation). Migrant-related activities are largely confined to specific municipal departments, such as the KEM, without integration into the city's broader services.

'It's like operating separately, as if it doesn't affect us'
HPEDSSD, 2023, interview, 23 January

Municipal actions rely on externally funded, short-term projects, rather than systematic, city-wide strategies. Inclusion mechanisms, where they exist, are informal and lack legal safeguards or institutional permanence, leaving them vulnerable to political shifts. Moreover, access to services depends heavily on the capacity of NGOs.
Consulted but Not Heard: Civic Participation in Athens

...civil society organisations play a crucial role in delivering services to migrants, yet their participation in municipal planning or decision-making remains limited.

In Athens, civil society organisations play a crucial role in delivering services to migrants, yet their participation in municipal planning or decision-making remains limited^[12]. NGOs are primarily treated as service providers rather than strategic partners. While initiatives such as the Athens Coordination Centre for Migrant and Refugee Issues (ACCMR) have helped create a bridge between the municipality and civil society, this engagement largely remains operational rather than political. NGOs contribute resources and expertise but are seldom included in shaping policies or long-term strategies. Their involvement is typically confined to the implementation of short-term, externally funded projects, leaving them structurally dependent on municipal leadership and vulnerable to political shifts.

Migrant voices are typically mediated through NGOs rather than directly represented, leaving communities structurally sidelined from decision-making.

Migrant communities themselves are even further marginalised. Migrants' political agency is constrained by the absence of voting rights in local elections, limiting their ability to influence municipal priorities. While migrant associations could help bridge this gap by representing community interests, they too are largely absent from municipal planning processes and decision-making spaces. Migrant voices are typically mediated through NGOs rather than directly represented, leaving communities structurally sidelined from decision-making. Despite the establishment of the MICs, intended as advisory bodies to represent migrant voices, their role is widely criticised. Their role and visibility depend heavily on the priorities of each municipal administration: some political leaderships engage them actively, others marginalise them, or ignore them altogether. Even when active, MICs function as purely advisory bodies without any formal decision-making power. Both municipal officials and civil society actors questioned their relevance and effectiveness, with many viewing them as symbolic structures that lack influence and a clear function within the municipal system.

[The municipality could] support the very communities themselves [but] there is no interaction at all; this, I believe, is the major issue-whether there is this participation or, in any case, collaboration at this level. Not just the kind of 'ah we're doing this, come and dance' or 'we'll have a meeting, come join us to show that we have a black person in the group'. This thing becomes a bit...we are not a wandering circus to be displayed left and right. There needs to be a meaningful conversation at some point, and although this had started, along the way, it seems that it hasn't [continued]."

GFM, 2022, interview, 13 October

Policy Recommendations

Based on the analysis, the following recommendations aim to support Athens in transitioning from reactive, fragmented responses to a stable, inclusive, and sustainable governance framework.

1. Strengthen Institutional Frameworks

- Establish legal mandates requiring municipalities to engage in migrant integration, with clearly defined responsibilities and multi-annual dedicated budgets to reduce project-based fragmentation.
- Formalise permanent municipal roles (e.g. Inclusion Officers) and integrate structures like the ACCMR into the city administration to ensure coordination across departments and policy continuity.
- Institutionalise and strengthen participatory structures such as the MIC, clearly mandating their role in municipal decision-making. Define their functions, ensure consistent operation across political administrations, and protect them from political shifts to guarantee stable, meaningful input from migrant communities.

2. Enhance Local Autonomy and Capacity

- Advocate for increased municipal autonomy in areas critical to migrant inclusion, such as housing, social services, and community support.
- Pursue direct access to EU funding to reduce dependency on national government allocations and enhance financial stability.

3. Develop and Mainstream an Inclusive City-wide Integration Strategy

- Create a comprehensive integration strategy with clear targets, evaluation mechanisms, and a focus on all migrant groups—not only asylum seekers and beneficiaries of protection, including undocumented and underdocumented immigrants.
- Transition from short-term, project-based interventions to multi-annual strategic planning for migrant inclusion.
- Develop integrated service hubs (similar to KEP) accessible to all residents, reducing administrative segregation and bureaucratic barriers.
- Provide intercultural training for municipal staff to improve understanding of migrant needs and enhance inclusive service delivery across departments.

4. Foster Civic Participation and Community Engagement

- Engage civil society organisations and migrant communities as partners in co-designing the city's integration strategy and local initiatives, moving beyond consultation towards shared decision-making.
- Facilitate community-driven initiatives by allocating municipal spaces directly to migrant communities for activities such as language classes, legal clinics, and cultural events.

5. Promote Data-Driven Policy Making and Accountable Policy Making

- Establish regular data collection and analysis on migrant demographics, needs, and service access to inform evidence-based policies.
- Introduce regular independent evaluations of inclusion initiatives to monitor progress, ensure accountability, and guide continuous improvement.

Conclusions

Without institutional safeguards, the city's capacity to serve its diverse population will remain unstable and vulnerable to political shifts.

Athens' experience highlights both the potential and the limits of local migrant governance within a highly centralised state. The city lacks the institutional structures, financial autonomy, and legal responsibilities needed to develop consistent, long-term inclusion strategies. Migrants are treated largely as temporary visitors, with municipal responses focused on short-term needs rather than structural integration. Service delivery remains fragmented, project-based, and heavily dependent on political will. Civic participation mechanisms remain weak and largely symbolic, leaving migrant communities without a meaningful role in local policy-making. While progressive leadership enabled important initiatives, subsequent reversals exposed the fragility of Athens' migrant inclusion efforts. Without institutional safeguards, the city's capacity to serve its diverse population will remain unstable and vulnerable to political shifts.

At the same time, Athens shows that local agency is possible—even within a centralised governance system—when political will exists. However, political will alone cannot substitute for structural reform. Relying on individual leadership risks reinforcing cycles of progress and regression. To move beyond reactive and fragmented responses, migrant inclusion must be embedded within stable municipal structures. Legal mandates, permanent municipal roles, dedicated funding, and strengthened participatory mechanisms are essential to protect inclusion policies from political turnover. Equally important is fostering meaningful collaboration with civil society and ensuring direct engagement with migrant communities themselves.

Athens' experience offers valuable lessons for other European cities operating in similarly centralised systems, such as Ireland or Portugal: without embedded, institutionalised inclusion mechanisms, progress will remain fragile, and exclusion will persist.

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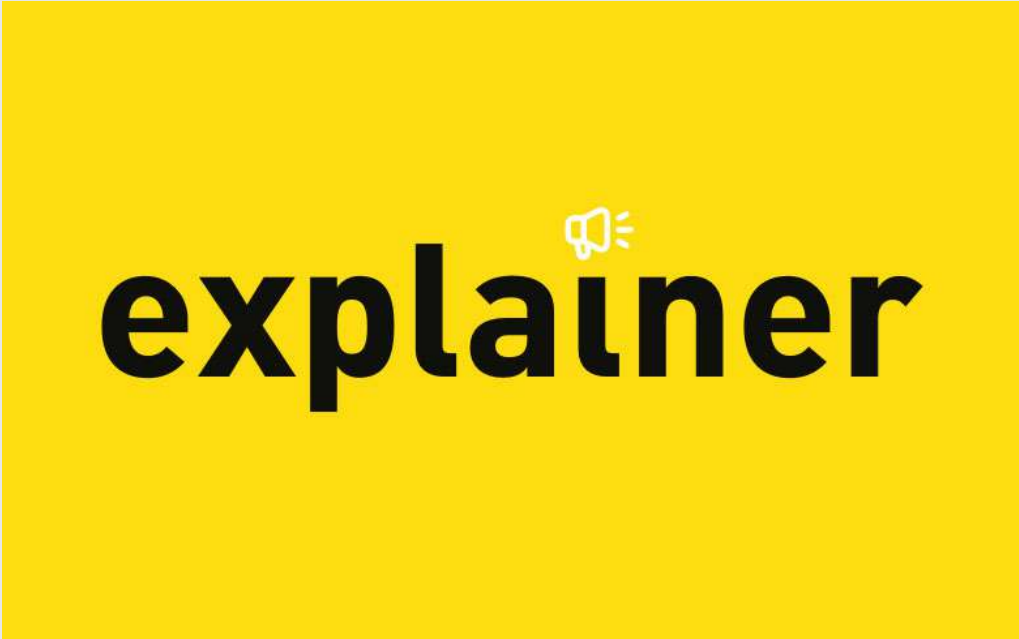
ELIAMEP Explainer: Operation Rising Lion: Israel's pre-emptive strike on Iran and its geopolitical aftermath

The European Union's Pact for the Mediterranean: Opportunity for a reset in the region?

ELIAMEP Explainer: Operation Rising Lion: Israel's pre-emptive strike on Iran and its geopolitical aftermath

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explainer

Introduction: A Dawn Offensive

On 13 June 2025, Israel launched Operation *Rising Lion*, a large-scale, multidomain military campaign targeting more than 250 strategic Iranian sites. These included nuclear infrastructure, air defence systems, missile platforms, and Revolutionary Guard command centres. The strikes resulted in the deaths of numerous senior Iranian figures, including IRGC Commander Hossein Salami, Chief of Staff Mohammad Bagheri, nuclear scientists Fereydoun Abbasi and Mohammad Mehdi Tehranji, and seven additional commanders within the IRGC Aerospace Force.

This offensive marked a significant inflexion point following the abrupt collapse of U.S.-Iran nuclear negotiations and mounting international concern over Iran's enriched uranium stockpile. Israel employed over 200 aircraft, coordinated cyber operations, and deployed sabotage teams in synchronised strikes on facilities at Fordow, Natanz, Isfahan, and on oil infrastructure near Tehran and Bushehr. Evacuation warnings were issued to civilians residing near "weapons production compounds" in Tehran.

Nuclear Capabilities and Diplomatic Disruption

The International Atomic Energy Agency (IAEA) confirmed in early June that Iran had amassed over 400 kilograms of uranium enriched to 60%—a threshold proximate to weapons-grade capability. Despite substantial damage to critical sites at Natanz and Isfahan, the fortified Fordow enrichment facility, located deep within a mountain, remained structurally intact as of 15 June. The IAEA has reported no evidence of radiation leakage at any location. According to Israeli sources, more than 720 discrete components of Iran's nuclear and defence infrastructure were neutralised.

A sixth round of U.S.-Iran nuclear talks, scheduled to take place in Oman, was suspended amidst the crisis. President Donald Trump publicly disavowed direct involvement in the Israeli strikes but reiterated that any assault on U.S. personnel or assets would provoke overwhelming military retaliation. Iranian authorities denied that any backchannel messages had been conveyed to Israel, underscoring the breakdown in diplomatic mechanisms.

Operational Intent and Strategic Execution

The operational scope of *Rising Lion* extended well beyond conventional strikes. Israeli jets and missiles targeted sites in Tehran, Shiraz, Isfahan, and the Shahrān oil depot. Several missile production and storage locations, nuclear research facilities, and fuel depots were struck, with secondary explosions reported across multiple regions. Fires at the Shahrān refinery temporarily disrupted operations, though services resumed shortly thereafter. According to Israeli officials, the military campaign remains active, with a declared objective to dismantle Iran's nuclear infrastructure comprehensively.

Explosions have continued across Tehran, including near Mehrabad airport and the affluent Sa'adat Abad district. The Israeli Defence Forces (IDF) issued evacuation warnings to civilians near suspected weapons production sites. Public shelters were opened in metro stations, mosques, and schools, as Iran's Ministry of Health advised people to stay away from windows due to the risk of blast debris.

On Sunday, Israeli strikes in Iran killed 224 people according to Iranian officials, with 90% of the casualties reported to be civilians. Iran's foreign ministry accused Israel of indiscriminate targeting, contesting the characterisation of 'surgical strikes.' Among the newly confirmed fatalities were IRGC intelligence chief Mohammad Kazemi and his deputy.

Iranian Retaliation and Proxy Dynamics

Iran's retaliatory response, dubbed Operation True Promise III, involved the deployment of over 150 ballistic missiles and dozens of drones targeting Israeli cities, including Tel Aviv, Haifa, Bat Yam, and Tamra. By the morning of 16 June, at least 14 Israeli civilians—including three children—had been confirmed killed, with over 370 injured and several still missing. Fires were observed at a power plant in Haifa, reportedly resulting from a successful Iranian missile strike involving two hypersonic warheads. The IDF continues to instruct civilians to remain near fortified shelters.

Iran has threatened to expand its targeting to U.S. military bases if further aid is provided to Israel. However, to date, Iranian strikes have carefully avoided U.S. assets—suggesting an unspoken agreement intended to avert broader escalation. Iranian President Masoud Pezeshkian has vowed a "more decisive and severe" response should Israeli bombardments continue, while also accusing Washington of sanctioning the offensive.

Of Iran's regional network of proxies, only the Houthis in Yemen have thus far engaged in active conflict, launching missiles toward Israel's port city of Eilat. Hezbollah, Iraqi Shiite militias, and other aligned groups have refrained from opening new fronts, perhaps signaling Tehran's desire to avoid provoking an overwhelming Israeli or American response.

Geopolitical Implications and Strategic Assessments

According to nuclear non-proliferation expert Richard Nephew, Israel's strategic calculus transcends tactical disruption. The broader aim is to dismantle not only Iran's material capability but also its political will to pursue nuclear armament. While Israeli strikes have yielded significant damage, Iran retains a dispersed and deeply entrenched infrastructure, as well as a cadre of skilled nuclear scientists, suggesting its programme may be slowed but not irreversibly halted.

Domestically, the Islamic Republic has exhibited signs of institutional strain. Tehran authorities have opened metro stations, mosques, and schools as improvised shelters. Civilian anxieties are reflected in widespread fuel rationing, traffic congestion, and government advisories instructing residents to avoid windows due to blast risk. The Ministry of Education cancelled all examinations.

Meanwhile, exiled opposition leader Reza Pahlavi has called upon Iranians to rise against the regime. Though he has garnered international attention, there is little concrete evidence of coordinated internal dissent. However, public discourse within Iran reflects growing discontent over the regime's foreign entanglements. Authorities in Iran recently uncovered a secret drone- manufacturing site in Shahr-e Ray, allegedly operated by Israeli agents.

U.S. Involvement and Strategic Ambiguity

The evolving U.S. posture in the crisis reveals a calculated balance between deterrence and detachment. While the White House insists it had no operational involvement in *Rising Lion*, U.S. assets in the region remain on high alert, and President Donald Trump has made clear that any attack on American personnel would prompt a full-scale response.

Reports indicate a tacit understanding may be in place: Iran avoids striking U.S. forces, and in turn, Washington refrains from intervening directly. This arrangement remains precarious. Trump's outreach to Russian President Vladimir Putin for de-escalation talks highlights the U.S. administration's interest in brokering a ceasefire, albeit without endorsing Israel's military initiative. Furthermore, President Trump is said to have personally vetoed an Israeli proposal to assassinate Iran's Supreme Leader, Ayatollah Khamenei—underscoring both the limits of Israeli latitude and the sensitivity of U.S. involvement.

Trump has since projected optimism, stating that "Iran and Israel should and will make a deal," suggesting active behind-the-scenes diplomacy. Nevertheless, the fragility of this equilibrium is evident. Sustained peace depends on changing assurances and strategic restraint.

International and Regional Responses

Global reactions remain polarised. Russia and China have denounced Israel's actions as reckless provocations, while Turkey has condemned both sides for escalating tensions. The UK and EU have ordered partial evacuations of diplomatic personnel. The Security Council remains gridlocked. The G7 has released a collective appeal for restraint and a return to negotiations. G7 leaders have convened in Canada with the Israel-Iran conflict dominating the summit agenda.

The energy market has responded with volatility. Brent crude rose more than 11% on fears that Iran may restrict access to the Strait of Hormuz, through which one-fifth of the world's oil transits. While Iran has not formally closed the strait, naval deployments suggest it remains a live threat. The risk of a maritime flashpoint involving U.S. or Israeli vessels is significant.

Flashpoints and Risks of Escalation

The Strait of Hormuz remains the most probable flashpoint for broader conflict. Any move by Iran to impede maritime traffic could provoke direct U.S. military engagement. Concurrently, Israeli warnings to Hezbollah and Iraqi militias indicate readiness for expanded confrontation. Cyberattacks and proxy actions in Gulf states and the Levant remain under close

observation. Reports of Mossad operations within Iran, including arrests in Alborz Province, underscore the clandestine dimension of this evolving crisis.

Conclusion: Containment or Conflagration?

Operation *Rising Lion* has transformed a protracted shadow conflict into overt military confrontation. While Israel's tactical achievements have impaired Iran's nuclear momentum, the strategic endgame remains elusive. Iran's resilience—both infrastructural and ideological—complicates any narrative of definitive victory.

The trajectory of this conflict hinges on the interplay between deterrence, diplomacy, and regional dynamics. The absence of a functioning backchannel, the active role of proxies, and the unresolved status of Iran's nuclear ambitions portend a volatile future. Whether the region reverts to a precarious equilibrium or spirals into wider war depends on the choices made in the critical days ahead. This evolving crisis, which began with a calculated pre-emptive strike, now straddles the boundaries between limited warfare and geopolitical upheaval.

The European Union's Pact for the Mediterranean: Opportunity for a reset in the region?

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The European Union's new Pact for the Mediterranean arrives on the 30th anniversary of the Barcelona Process, representing a renewed impetus to forge a working relationship with the ten countries of its Southern Neighbourhood. To achieve this and allow the EU to fully unlock the region's many opportunities, the Pact is called upon to address a complex set of circumstances, which will require it to confront several key structural challenges.

Challenges

- Internal EU Disunity: The competing interests of member-states in the Mediterranean (e.g., France and Italy in Libya) undermine the EU's ability to act as a unified bloc.
- Geopolitical Considerations: The EU must either confront or accommodate Turkey's regional aspirations, including its Mavi Vatan maritime doctrine. Turkey's demeanour directly obstructs key EU energy and connectivity projects, while challenging the rights of Greece and Cyprus in the Eastern Mediterranean.
- Trust Deficit: The EU faces the conundrum of both overcoming reservations over its values-oriented approach, often perceived as veiled neocolonialism, that hinder cooperation while not appearing as overtly transactional, and thus alienating its partners. It must offer an attractive solution to its leading Southern partners and pre-empt them from seeking new alliances (e.g., Egypt joining BRICS).

However, there are several opportunities that the European Union can pursue in the region across several fields including energy, migration, and increased geopolitical influence in an area that directly impacts its interests.

Opportunities

- Energy Hub: The Mediterranean is critical for the goal of EU energy independence from Russian fossil fuels, both by harnessing the region's energy reserves and as a point of entry for energy from North Africa, Asia, and the United States. This includes a strategic role for Greece as a key port of entry for American LNG via the Revithoussa LNG Terminal and the Alexandroupolis FSRU.
- Migration Management: The Pact must reform the EU's externalization model to address migration flows, a process complicated by internal divisions and ethical concerns following incidents like the Pylos shipwreck.
- Agency: The Pact is the EU's chance to assert its own strategic autonomy in a critical region, in which power has been traditionally wielded by those far from the Mediterranean shore. With the prevalence of competing corridors (e.g., China's BRI and the proposed IMEC) in a critical waterway, the European Union must (to) ensure it is not a spectator in its own neighbourhood.

Introduction

The upcoming Pact for the Mediterranean is a manifestation of renewed impetus by the European Union to once again forge a *modus vivendi* with the ten countries of the so-called Southern Neighbourhood.

The Pact will arrive on the 30th anniversary of the launch of the Euro-Mediterranean Partnership, commonly known as Barcelona Process, in 1995, which set the goal of transforming the region into an "*area of dialogue, exchange and cooperation, guaranteeing peace, stability and prosperity*". This was to be achieved by focusing on enhanced political dialogue, increased economic interdependence, and social and cultural exchanges that would strengthen relations between Europe and its Mediterranean neighbours.^[1]

The Barcelona Process can be seen as a product of its time, launched in the post-Cold War certainty of Francis Fukuyama's "*end of history*" and the assured "*universalization of Western liberal democracy as the final form of human government*".^[2] There was little scope or resilience for the developments witnessed in the region, from the spread of terrorism in the early 2000s to the pivotal Arab Spring in 2011 and its aftershocks, including increased political violence and an explosion of refugee and migrant movement via cross-Mediterranean routes. Exacerbated by the spectre of a multipolar world order and a renewed global emphasis on hard power and 'realist' diplomatic approaches, evidenced by the deepening division of regional rivalries in the Mediterranean, it is safe to say that little of the optimism enshrined in the Barcelona Process survived the 21st century.

“The Southern Mediterranean region is facing governance, socio-economic, climate, environmental and security challenges, many of which result from global trends and call for joint action by the EU and Southern Neighbourhood partners”, noted the European Union in its 2021 “Renewed Partnership with the Southern Neighbourhood” which sought to address the many difficulties of the region.^[3] Yet, almost five years later, little has been achieved in resolving these issues. In fact, the return of large-scale warfare both in Europe and the Middle East, the increase of competition between the global superpowers, and the selective engagement of the United States, have created an even more dangerous set of circumstances for the region. This is the situation that the Union’s new Pact for the Mediterranean is called upon to address.

Despite the many challenges in the region, however, it also offers several opportunities. The Mediterranean in the long run can enable the European Union’s ambitious “Green Deal”, with renewable energy from the African continent helping drive the transition, and in the short run can offer viable alternative non-renewable energy resources to reduce European dependency on Russian fossil fuels. The region will also be pivotal in addressing the issue of migration which continues to be a pressing political issue for many member-states.

It is clear that the Mediterranean is a critical area for both the European Union’s strategic autonomy and its economic independence. A stable, prosperous, and secure, Southern Neighbourhood will greatly benefit the EU at a time of geopolitical flux. However, to this end the Pact for the Mediterranean must also confront several key challenges.

Challenge #1 - Division within the European Union

Despite the goal of a common foreign policy for the European Union, it is commonly accepted that each member state often prioritises its own national interests ahead of the pursuit of any shared goal.^[4] And while disagreements over priorities have hamstrung several EU initiatives in the Mediterranean in the past, including the two European Union Naval Force Mediterranean operations,^[5] in extreme cases there have even been instances of open competition between member states in the region.

Nowhere have the divergences between member states been felt more acutely than in Libya, both during the final years of the civil war that ended in 2020 and the subsequent continued division of the country between the Tripoli-based Government of National Unity (GNU) and the Tobruk-led Government of National Stability (GNS).

On the one hand, Italy has worked closely with the GNU, both in the fields of migration and energy co-operation, while France and Greece have mostly focused on forging ties with the de facto ruler of Eastern Libya, Field Marshall Khalifa Haftar. Following the end of the civil war in 2020, this stark divide became less obvious, as there were attempts from most parties involved to bridge existing differences and grievances. Greece, for example, has undertaken significant diplomatic efforts to initiate a rapprochement with the GNU, focused on the issue of maritime delimitation, with the two sides even starting talks on the matter in September 2025.^[6] However, telltale signs remain of this divergence.

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It is worth noting that, despite the much improved situation today, the divergence between Paris and Rome during the conflict led to a very public souring of bilateral relations at the time.^[7] Over this period, Italy's ENI and France's TotalEnergies have also been involved in fierce competition over Libya's energy resources, which, during the Libyan Civil War, geographically mirrored the political support provided by their respective nations to Libya's domestic players. This competitive dynamic complicates the EU's ability to act as a unified geopolitical or economic bloc in the region.

Tangentially related to Libya, the troubled activity of both Operation Sophia and Operation Irini also emphasize the effect of divergences between member-states in action. Tension between Italy's government at the time, and in particular the conduct of then Italian Deputy Prime Minister Matteo Salvini, and other members of the mission, primarily Germany, continued to escalate and reached a climax when Germany withdrew from the mission. Ursula Von Der Leyen, then German Federal Minister of Defense, even went so far as to accuse the Italian commanders of Operation Sophia of sabotaging the mission.^[8]

Operation Irini, which succeeded Sophia with a mandate to enforce a United Nations arms embargo on Libya until 2027, has also faced its own share of problems. Most notably, in 2020 Malta withdrew from the operation and threatened to veto any European decisions on the operation.^[9] The operation also resulted in a series of tense stand-offs with the Turkish Navy, something which will be explored in more depth later.

Libya is just one country out of the ten highlighted by the European Union as its Southern Neighbourhood. Admittedly, its central role in both Europe's energy endeavours in the Mediterranean and as a major transit point for migrant corridors make it stand out.^[10] However, the failure of the European Union to devise a common policy in its approach to the war-torn country is telling.

Divergences also exist on a wide range of other issues, from the recognition of Palestinian statehood to the stance of member states on external actors such as Russia and China. The North-South divide within the EU on the issue of migration also persists, with the Mediterranean EU member states increasingly moving towards more controversial practices to tackle the influx of migrants and refugees (including Italy's controversial deal with Albania and Greece's suspension of asylum applications for three months).

The Pact for the Mediterranean must provide a credible path to an accord between European member states in the region, otherwise the Union risks once again being unable to react to developments in the region. This would lead EU countries in the region to revert to the status quo of focusing on regional bilateral and multilateral cooperation schemes and will allow external actors like Russia and Turkey to continue to maintain the initiative.

Challenge #2 - Trust Deficit

Several of the governments of the South Neighbourhood have long harboured a wariness over European Union values-oriented policies for attempting to violate their sovereignty and erode their control, often decrying these measures as veiled neocolonialism in which the European countries seek to secure their own interests (usually in their former colonies) and promote Eurocentric values.^[11]

After all, the Barcelona Declaration of 1995 stated that all participants seek to "*respect human rights and fundamental freedoms and guarantee the effective legitimate exercise of such rights and freedoms, including freedom of expression, freedom of association for peaceful purposes and freedom of thought, conscience and religion, both individually and together with other members of the same group, without any discrimination on grounds of race, nationality, language, religion or sex*".^[12] Thirty years later, not only has this not been achieved, but arguably the environment is less conducive to the safeguarding of these rights. In fact, the Office of the United Nations High Commissioner for Human Rights notes that: "*The Middle East and North Africa faces significant challenges, including situations of armed conflict, the rise of violent extremism and the counter-terrorism narrative affecting civil and political rights as well as deeply rooted discrimination against groups*".^[13]

It is clear that today the EU has already adopted a more transactional approach with many of the key actors in the region and has retreated from many of its past stances on the issue. While, for example, the 2024 Joint Declaration on the

Strategic and Comprehensive Partnership between the European Union and Egypt reiterates the commitment to “*work [...] to further promote democracy, fundamental freedoms, and human rights, gender equality and equal opportunities*”,^[14] there are many (including Human Rights Watch^[15]) who argue that there has been little progress on this front. This is not something that has stopped the European Union from acknowledging “*Egypt as a reliable partner, as well as Egypt’s unique and vital geo-strategic role as a pillar of security, moderation, and peace in the region of the Mediterranean, the Near East and Africa*”.^[16]

But there is little evidence that this has achieved much in shifting the widespread perception of EU intentions in the region. There are even those that argue that the European Union’s more pragmatic approach is, in fact, more neocolonial in nature.^[17]

In the Sahel, not far from the Mediterranean coast, there are already developments that should be of concern to European policymakers. The French military withdrawal from Mali, Niger, Burkina Faso, and Chad,^[18] while undoubtedly rooted in different and complex circumstances, emphatically illustrates the continued dynamism of anti-colonial sentiment, particularly when it is fuelled by hostile actors like Russia.^[19]

At the same time, European ambivalence over Israeli actions in Gaza did little to earn the EU any goodwill with the Arab populations of the Mediterranean. While it remains to be seen if the current ceasefire will last, the EU’s unwillingness to act on the matter in the same decisive manner it had displayed following the Russian invasion of Ukraine certainly rankled with several actors in the region.^[20] After all, it was not too long ago that the European Union and the United States were calling on these countries to freeze out Russia. “*The EU actively urges all countries not to provide material or other support for Russia’s war of aggression*” was the Commission’s recommendation when documents leaked that Egypt was secretly planning to produce 40,000 missiles for Russia.^[21]

It is clear that the Pact for the Mediterranean must move beyond pious generalities about strengthening the relations of the EU with its Southern Neighbours. Fuelled by the possibility of a new multipolar world order, and the selective engagement of the United States, it is clear that several governments in the region see little reason to engage with the European Union’s exacting list of governance reforms. Egypt has already been admitted as a full member of the BRICS.^[22]

The fanning of decolonial sentiment, coupled with the proliferation of rhetoric emphasizing competition between the Global North and Global South, have undeniably exacerbated the situation. It will require a delicate balancing act by the European Union to move beyond these difficulties and to work to materially improve relations in the Mediterranean, while at the same time not compromising on the very values that make the European Union what it is.

Challenge #3 - Turkey

Turkey’s regional aspirations in the Eastern Mediterranean must be considered when developing the European Union’s Pact for the region. The maximalist claims of the Mavi Vatan (Blue Homeland) maritime doctrine not only directly impinge on the rights of two EU member states (Greece and Cyprus) but directly involve countries which are part of the Southern Neighbourhood (namely, Syria, Libya, and Egypt). The EU’s ambivalent stance on Turkey cannot be considered in a vacuum and directly affects its relations with the region.

While the EU has unequivocally condemned the Turkish - Libyan Memorandum of Understanding on the delimitation of Exclusive Economic Zones (EEZ) of 2019,^[23] several European Union projects are directly affected by it. Most notably, the Great Sea Interconnector that proposes to link the power grids of Greece, Cyprus, and Israel, faces significant geopolitical hurdles from Ankara’s objection to the project on the grounds that it violates its claimed maritime rights. It is worth noting here that the interconnector is a Project of Common Interest for the European Commission.

In the summer of 2025, Turkish naval vessels stopped research vessel Fugro Gauss from conducting surveys for the East to Med Corridor (EMC), the proposed fiber-optic cable that would link Israel to France via Greece and Cyprus. “*We always conduct the necessary monitoring, preventing any unauthorized activity on our continental shelf, and we do not allow activities or projects [such as the Great Sea Interconnector project] that disregard our country*”, noted Turkish sources.^[24]

This risk can be assumed to hold for other proposed trans-Mediterranean projects, including the GREGY (Greece - Egypt) electrical interconnector, while it certainly acted as a detrimental factor in the feasibility considerations of the EastMed pipeline project. In fact, the EastMed pipeline was effectively shelved in January 2022, following the decision of the United States to publicly withdraw its support, primarily attributed to American concerns that the project would act as a spoiler for rapprochement efforts with Ankara.^[25]

While Turkey's involvement in Libya has solidified over the last five years, it is also becoming an increasingly influential player in the Middle East following the fall of the Assad regime in Syria. The extent of Turkey's influence with new President Ahmed al-Sharaa remains to be seen, but its military presence in northern Syria and northern Iraq has undeniably shifted the regional balance of power. This is further compounded by its developing regional security ties,

most notably through the diffusion of Turkish-produced military equipment like the Bayraktar TB2 drones, which has transformed the country's power projection and cemented it as a major regional arms exporter.^[26]

The relationship between Turkey and the European Union has been the subject of many research papers and debates and lies quite beyond the scope of this paper. However, it is increasingly clear that some accommodation will have to be reached with a Turkey that seeks to establish itself as the regional power of the Eastern Mediterranean.

With member-states having significantly different views on how to accommodate Turkey in the region's security architecture, emphasized by the current debate on its membership in the EU's SAFE joint procurement project on rearmament, the Pact for the Mediterranean will also be called upon to navigate between the existential threat from Turkey felt by two European Union member states, Turkey's rivalry with France for primacy in the Eastern Mediterranean, as well as Italy's, Malta's, and Spain's more accommodating stance.

Opportunity #1 - Energy

The European Union has staked its independence from Russian fossil fuels on the energy reserves of the Mediterranean and the Southern Neighbourhood. This includes several "tried and tested" options. Libya's proven oil reserves are the largest on the African continent, even as political factors on the ground continue to complicate its exploitation.^[27] Its neighbour, Algeria's share of natural gas imports to the EU is at 17.8%, making it the second-largest supplier after Norway (50.8%) for the second quarter of 2025.^[28] However, there is concern that the country will be unable to ramp up production to meet European demand.^[29]

Recent energy developments in the Eastern Mediterranean have also generated strong interest as a potential solution in ensuring the EU's energy autonomy. The discovery of substantial gas fields in the region, including the Israeli Leviathan, the Cypriot Aphrodite, and the Egyptian Zohr, in the 2010s marked a paradigm shift for the region. The discoveries in the maritime areas of Cyprus and Israel in particular, due to these countries' smaller population and lower levels of consumption, could make the two countries net global exporters of natural gas.^[30] Overall, the region is estimated to have as much as 8 trillion cubic metres in natural gas.

There are important geopolitical and infrastructure challenges that need to be overcome for this to become a reality, however. Firstly, Cyprus' continued territorial disputes with Turkey, which refuses to recognize its EEZ, means that development in the extraction and exploitation of these resources has yet to materialise. In Egypt, among other issues, onshore liquefaction plants do not have the capacity to meet European demand, with Egypt only currently able to export the equivalent of 5% of the demand.^[31] Additionally, the Egyptian government has so far failed to fully liberalise its gas market, which has also stunted investment in the country's energy sector.

There are the kind of issues that must be addressed by the Pact. If the European Union is serious about its commitment to diversify its energy sources and become independent of Russian fossil fuels by 2027, it must prioritise its efforts in the Mediterranean. As a result, it must take concrete steps to facilitate Cyprus' ability to capitalise on its gas discoveries while assisting Egypt in further developing its liquefied natural gas (LNG) export facilities.

But it is important to stress that massive infrastructure projects are required to further develop energy connectivity in the region. These include the aforementioned Great Sea and GREGY electricity interconnectors, but shelved projects like the EastMed pipeline should also be considered once more. Indicatively, Cyprus is currently set to export its gas through Egypt with Julien Pouget, Senior Vice President of Middle East & North Africa, Exploration & Production at TotalEnergies, noting that “*TotalEnergies is very pleased to be part of the opening of an export route through Egypt for Cyprus gas. This Host Government Agreement represents a major step in valorizing the Cyprus gas through available LNG capacities in Egypt, contributing to Europe energy security by bringing additional LNG volumes*”.^[32] Clearly, a link to transport gas from the Eastern Mediterranean directly to Europe would be a welcome development.

Aside from its own reserves, the Mediterranean is also a critical point of entry for energy resources from other parts of the world. The Suez Canal has seen an increase in northbound oil and gas flows following Russia’s invasion of Ukraine, with Europe increasingly relying on imports from the Middle East.^[33] At the same time, the United States is looking to expand the export of American LNG to the continent. Countries like Greece, which has been developing its regasification capacity, have been singled out in this endeavour, as emphasized in the recent visit of United States Secretary of the Interior Doug Burgum in Athens.^[34] This is because the country is strategically positioned to serve as an entry point, notably via the Revithoussa LNG terminal and the new Alexandroupolis Floating Storage and Regasification Unit (FSRU).

The Mediterranean will also likely be important for the European Union’s ‘green transition’, with the region possessing bountiful renewable energy sources in its solar and wind power generation potential.^[35] If all solar, wind, and hydropower, projects in the region are completed, combined with current generation capacity, it is estimated that the region could produce a total of 779,2 GW, almost three times the current capacity and 73% of the regional goal of 1 TW.^[36] Once again, the Pact must ensure that it creates a proactive and efficient framework in promoting this transition across the Mediterranean, but also ensuring the necessary infrastructure links to import this energy.

Opportunity #2 - Migration

Migration has been one of the primary challenges of the European Union over the last decade, both at the domestic political level and institutionally. At the country level, it has fuelled the rise of far-right parties across the continent, which often accompany their anti-migrant rhetoric with Euroscepticism. There have also been divisions between the member-states on how to best manage the influx of migrants and refugees. These are comprehensive differences, ranging from the very basics of practices when rescuing migrants at sea to questions of refugee and migrant quotas. The practical solution to this issue was the externalisation of the EU’s border control, with primary responsibility for managing migrants flow being delegated to the countries of the Southern Neighbourhood, with assistance packages being agreed with countries like Turkey (a total of €9 billion), Egypt (€7.4 billion), Lebanon, and Tunisia to stem the flow of migrants and refugees.^[37] But it is important to note the scale of the problem. More than a million people have crossed the Mediterranean over the last decade, with Greece registering almost a quarter of a million asylum applications just between 2019 and 2023.^[38] Specifically, in 2023, the EU recorded over 380,000 irregular border crossings, the highest number since 2016, with the Central Mediterranean route, from North Africa, mainly Tunisia and Libya, to Italy and Malta, being the most active.^[39]

With the failure of the European Union to adopt a comprehensive and shared approach to the issue, the states most affected by migration have established their own policies and methods to tackle the issue. The principle of non-refoulement and the definition of ‘safe countries’ has been at the heart of this debate, both in Italy and Greece. The two countries have also faced legal challenges to their policies with the European Court of Justice ruling against Italy’s controversial deal with Albania, and the European Court of Human Rights challenging Greece’s three-month suspension of the right to asylum.

Allegations of human rights violations have also been levelled against the border enforcement agencies tackling migration on both sides of the Mediterranean, with Libya being once more at the heart of the issue. European Union border agency Frontex has been accused of being complicit in severe violations of human rights by the Libyan coastguard as it provides it with aerial surveillance assistance. This often results in the return of migrants and refugees attempting to cross the Mediterranean to ‘systematic and widespread abuse’ in Libya.^[40] Additionally, non-governmental organizations (NGO) operating in the region to rescue migrants and refugees have claimed that the Libyan Coast Guard has begun to shoot at

the vessels in an effort to deter their activity. “*It’s unacceptable that the Italian government and the EU allows criminal militia to fire on civilians*,” said a spokesperson for one of these NGOs.^[41] Yet, both Greece and Italy are set to continue their close co-operation with their Libyan partners to tackle the issue of migration.

But it is not only these partners that have been accused of violating the rights of migrants and asylum seekers. The Hellenic Coast Guard has long been accused of conducting pushbacks, and in the aftermath of the Pylos shipwreck and the more than 500 presumed dead, there were even institutional calls for the Frontex agency to leave the country in protest of its handling of migrant vessels.^[42] The incident tragically highlighted the lack of effective search-and-rescue (SAR) capabilities and coordination in the Mediterranean, a crucial gap the Pact is set to address.

The issue of migration is a minefield for the European Union, filled with difficult choices and undesirable outcomes. As anti-migration rhetoric continues to proliferate at home, it is unlikely that the European Union will seek to radically change its enforcement model in the region. However, the Pact for the Mediterranean will have to be very careful in how it approaches the issue.

It is important that tackling the issue of migration does not continue to be perceived as being in the self-serving interest of the European Union, solved by offloading the ‘dirty work’ to its partners in the Southern Neighbourhood.^[43] This would not only substantially undermine the EU’s credibility, particularly when it comes to issues of promoting good governance and the rule of law, but also leave it indebted to third parties and provide leverage to these actors.

Instead, the Pact for the Mediterranean must act as a starting point for a comprehensive reform of the European Union’s overall approach to migration. If the concerns of the European south are not addressed, then these states will likely once more pursue their own policy on the matter irrespective of whether it breaks from EU strategy or even legal and ethical norms.

Opportunity #3 - Connections and Corridors

The Mediterranean has been one of the most important meeting points of humanity for millennia, with cultural and commercial exchanges flourishing along its coastline since the Bronze Age. The Barcelona Process focused heavily on the importance of civil society for the further development of the ties between the states of the Mediterranean. However, today, the rise of far-right parties in Europe and the resurgence and entrenchment of authoritarian regimes in North Africa and the Middle East following the Arab Spring have left little room for manoeuvre in this regard.^[44]

At the same time, the Mediterranean is set to become more interconnected than ever before. Economic corridors and infrastructure connectivity is expected to become a dominant feature of the region, something which must be capitalized upon to increase the cultural and social cohesion between the Mediterranean states. Cooperation on key issues and shared threats, including climate change, water resilience, and global pandemics, should be a key priority for the Pact. Even cooperation on tourism, which is a significant source of income for countries in the region, must be further developed, despite more than two billion euros having been already allocated to a total of 17 Interreg programmes in the region.^[45]

Countries around the Mediterranean will face significant water shortages in the future, with millions of people already facing water scarcity.^[46] With many of the world’s most water-stressed areas being located in the region, close co-operation will be required to counter the issue as there exist both a serious investment gap and a lack of technical expertise in confronting this problem.^[47] Yet, it will be important for the European Union to actively assist its partners in mitigating the impact of climate change and to avoid the further desertification of the region, something that would only exacerbate cross-Mediterranean migratory flows.

Technological innovation and digital connectivity can also have an important role in bridging the divide between the states in the region and further unlock the area’s potential. Undersea fibre optic cables already account for the vast majority of internet traffic, and the EU Global Gateway investment project has already been seen as a valuable instrument in further developing a sustainable digital infrastructure and regulatory framework for the Mediterranean in the future despite

difficulties in securing adequate funding.^[48] Developing a communications network in line with European values and standards could allow the EU to engage in specific digital economy partnerships, aligning the region to its own economic and development priorities and further underlining its global role as an important digital partner.^[49]

Several initiatives have been successful in forging links within the region, and instead of retreat, the Pact for the Mediterranean must double down on these efforts to promote a shared space of peace and prosperity. Soft power has always been one of the most important ways in which the European Union has pursued its goals on the global stage. “*The role of culture as a vector for peace, democracy and economic development will continue to be supported to help build a more inclusive Mediterranean. Culture is a field where there is a real added value in working at regional level to reduce social isolation and build connections across the Mediterranean region*”, noted the EU’s Regional Multiannual Indicative Programme.^[50]

Opportunity #4 - Agency

Since the Napoleonic Era, political control of the Mediterranean has been determined by actors who were far from its shores, from the British Empire in the long nineteenth century to the Cold War struggle between the United States and the Soviet Union in the latter half of the twentieth. However, in the post-Cold War era these traditional rivalries have been steadily retreating, with the termination of Russia’s lease on the military base of Tartus acting as an emphatic capstone. But there is also the high likelihood that the Mediterranean will continue to feature prominently in a renewed era of Great Power competition. Indicatively, the Mediterranean saw one of the most significant concentration of warships in the world during the opening days of the Russian invasion of Ukraine.

China is increasingly becoming a major factor in the region, developing its bilateral relations with the countries of North Africa and West Asia through a focus on soft power and development (best exemplified by the country’s Belt and Road Initiative or BRI) and buoyed by Beijing’s official policy of non-interference in domestic politics.^[51] But it has also began developing deeper security and diplomatic relations with actors in the region, including establishing Comprehensive Strategic Partnerships with Algeria and Egypt. In fact, aside from the fact that China has become the leading trade partner for both countries, it also is providing them with military equipment and support (even conducting joint naval exercises with Egypt).^[52] Chinese military supplies to northern Africa accounted for almost half (49%) of its total military exports to the continent. China also opened its first overseas military base in Djibouti, not far from the southern entrance to the Red Sea and the Suez Canal. Additionally, China has been attempting to establish itself in the Balkans and Eastern Europe through the 14+1 cooperation scheme, with the COSCO-owned Greek port of Piraeus seen as a key entryway for the BRI into Europe.

While the United States will likely continue its pivot to the Indo-Pacific in an effort to contain Chinese aspirations, a more comprehensive and hawkish US policy could likely see the country re-engaging with the Mediterranean to this effect. With the current administration’s efforts to reinforce American shipbuilding capabilities, both military and commercial, it may also seek to re-establish its presence in one of the world’s most critical waterways. While the United States Sixth Fleet has dwindled in size since the end of the Cold War, usually down to one carrier battle group, it is strongly reinforced in times of crises. In the aftermath of the October 7, 2023, attack by Hamas, the USS Gerald Ford carrier and the amphibious assault ships USS Bataan and USS Wasp were all deployed to join the Sixth Fleet in the Eastern Mediterranean.

There are elements within the US military chain of command who directly view the BRI as a threat to US interests, as it strengthens China’s control over the global logistics system. The establishment of Alexandroupolis as the main port of entry for NATO materiel, a port free of connection to either China or Russia, was not a coincidence, nor was the Greek’s state decision to cancel the tender for the port due to its increased geopolitical and strategic importance spontaneous.^[53] “[S]ome OBOR [One Belt One Road] investments could create potential military advantages for China, should China require access to selected foreign ports to pre-position the necessary logistics support to sustain naval deployments in waters as distant as the Indian Ocean, Mediterranean Sea, and Atlantic Ocean to protect its growing interests”, tellingly noted a Pentagon report in 2018.^[54]

If the India-Middle East-Europe Corridor (IMEC), supported by elements of the United States administration as a counterweight to the BRI,^[55] materialises it would add yet another dimension to a possible renewed global struggle over

the Mediterranean, with India and China likely to compete for influence in the region, and likely, the same actors. The IMEC, announced in September 2023, is intended to serve as a strategic and economic bridge between Asia, the Middle East, and Europe, positioning the Mediterranean as a central node in future global trade architecture. This convergence of competing great power-led corridors highlights the region's increasing strategic value, necessitating a proactive and unified EU response through the new Pact.^[56]

Additionally, states from the Gulf region, primarily Saudi Arabia and the United Arab Emirates, have also gradually increased their footprint in the Mediterranean, even if their focus is limited in scope. Initially enmeshing themselves in the region in the aftermath of the Arab Spring to counter the spread of the Turkey- and Qatar-backed Muslim Brotherhood,^[57] the two Gulf states have since developed strategic and economic ties with both sides of the Mediterranean coast, particularly Greece and Egypt. These investments often focus on strategic sectors like ports, logistics, and renewable energy, creating an alternative source of capital and influence outside traditional EU and Chinese channels.

This could be a defining moment for the European Union to prove that it can be a serious geopolitical player.

This could be a defining moment for the European Union to prove that it can be a serious geopolitical player. While the threat of a US withdrawal from NATO has subsided, it is clear that the EU must move beyond its dependence on American policy to secure its own security and prosperity. The Mediterranean continues to be a region in flux, with several global and regional powers seeking to assert themselves in this strategically and economically critical area. The Pact for the Mediterranean must facilitate the European Union in its efforts to seize the initiative and muster the agency to chart its own path in a region that directly impacts it, rather than to once more be relegated to the role of a reactive spectator.

Conclusion

The Pact for the Mediterranean will arrive at a challenging time for the region. The divergence between the European Union and its Southern Neighbourhood seems more likely to grow deeper instead of being bridged. There are serious challenges on all fronts, political, economic, and social, that risk its viability entirely. A more holistic approach by the European Union to the region can only benefit its influence and credibility, but it must be careful in acknowledging and addressing the concerns of its member states in the region and be cognisant of the adverse global conditions.

Ultimately, the Pact will be judged by its implementation. Whether it will offer measurable and concrete actions to confront the challenges and grasp the opportunities of the region, or whether it will remain a document defined by good intentions, remains to be seen. To succeed, the Pact must prioritize internal EU cohesion, credibly address the trust deficit with Southern partners by balancing values and transactional interests, and demonstrate a unified strategic stance toward external actors, particularly Turkey. Only through such a consistent action can the EU fully capitalize on the energy, connectivity, and geopolitical agency opportunities the Mediterranean offers.

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Climate & Sustainability

ELIAMEP Explainer: The 6th P-TEC Meeting in Athens: Greece at the Core of Transatlantic Energy Realignment

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The sixth ministerial meeting of the Partnership for Transatlantic Energy Cooperation (P-TEC), held in Athens in early November, marked a turning point in the strategic characteristics of energy flows across the Euro-Atlantic area.

This year's P-TEC gathering reflects a convergence of structural and political transformations on both sides of the Atlantic. For the United States, the transition into a net natural gas exporter over the past eight years has fundamentally altered its global energy position. For the first time since the end of the Cold War, Washington possesses the capacity to counterbalance and ultimately deter Russian influence along NATO's eastern flank, closing a long-standing vulnerability for the Alliance and for U.S. strategic interests in Europe. For the European Union, the determination to end dependency on Russian gas reached a decisive milestone in October 2025, when EU's energy ministers adopted the commitment to terminate all Russian gas imports by 2028. Beyond the termination of Russian LNG deliveries to western European regasification terminals, this decision effectively leads to the neutralization of the Turkish Stream pipeline, the last operational pipeline carrying Russian gas into the European market and the Kremlin's last remaining channel of energy leverage within NATO's southeastern periphery.

Within this shifting transatlantic framework, Greece emerges as a key actor for the success of the strategic transformation of gas routes. Through its expanding network of LNG reception terminals and interconnectors, it is becoming the primary southern entry point for U.S. gas flows to Southeast Europe and, increasingly, to Ukraine, capable of substituting the neutralized Russian pipeline routes and solidifying the new architecture of regional energy security.

From energy vulnerability to new energy options

For decades, the balance of influence in Eastern and Southeastern Europe was defined by Russia's near-monopoly over pipeline gas supply. This dependency constrained European diplomacy and limited NATO's resilience along its eastern flank. The shale revolution and subsequent LNG export capacity of the United States altered this dynamic. The transatlantic energy alignment that now links Gulf of Mexico liquefaction facilities to European regasification terminals has redefined the quest for energy security as an instrument of Western strategic cooperation.

P-TEC, initially conceived as a coordination forum among the United States, and the European Union, has evolved into a platform for operational alignment: coordinating infrastructure development, standardizing market rules, and mapping supply resilience from the Adriatic to the Black Sea. The Athens meeting was symbolically and substantively crucial. It took place as the U.S. and EU began implementing their joint energy security roadmap while the only remaining Russian export corridor to Europe, the Turkish Stream pipeline, faces progressive neutralization.

The strategic neutralization of the Turkish Stream pipeline

The Turkish Stream pipeline, transmitting roughly 60% of Russia's remaining gas exports to Europe through the Black Sea and Turkey towards Bulgaria and then the rest of the region, is the Kremlin's last active instrument of energy leverage within NATO's southeastern flank. The gradual, contractual-infrastructure-political neutralization of this pipeline within the next three years is at the core of the new transatlantic strategy.

This process, however, does not rely solely on the discontinuation of the Russian gas flows, but on the parallel establishment of viable and cost-competitive alternatives that will eventually replace and make Russian gas commercially irrelevant. The deployment of new LNG capacities in Greece, coupled with reverse-flow infrastructure toward Central and Eastern Europe via the Vertical Gas Corridor, and the Greece-North Macedonia gas pipeline, is the operational mechanism of this "soft neutralization."

Greece has become the southern pillar of this transformation. The Revithoussa terminal has already reached record utilization rates, while Alexandroupolis has been successfully integrated into regional gas flows. The planned LNG terminals in Corinth in the south of Greece, Volos in central Greece and, potentially, Thessaloniki in the north are expected to complete a strategic network of entry points enabling multi-directional redistribution of gas toward North Macedonia, Bulgaria, Romania, and eventually Ukraine. Once fully deployed, this network will allow the substitution of Russian molecules with transatlantic gas, thereby ending Moscow's ability to manipulate markets and alliances in the region through energy dependency.

The need for elevated infrastructure security

The shift of strategic influence from the Turkish Stream pipeline to a new transatlantic-based corridor from the south to the north of the eastern borders of Europe, also generates new vulnerabilities. As Russia and Turkey face a loss of geopolitical leverage over Southeastern Europe's gas routes, the emerging Greek infrastructure may increasingly become a potential target for hybrid disruption. In recent years, incidents of sabotage, cyber intrusion, and disinformation have proliferated across Europe, targeting both physical assets and the credibility of alternative gas supply routes. In this context, Greece's LNG terminals, interconnectors, and energy data networks could become focal points for asymmetric pressure, whether through physical interference, digital attacks, or narrative manipulation regarding the reliability and cost of LNG flows.

This risk underscores the need for enhanced resilience planning: strengthened cybersecurity protocols, regional crisis coordination mechanisms, and NATO-EU cooperation in energy asset protection. As Greece's role evolves to a critical energy transit spot, the protection of its infrastructure needs to become a shared transatlantic responsibility. The same necessity applies for the pipeline networks utilized for this purpose. The IGB pipeline and the overall route of the Vertical Gas Corridor through Bulgaria, Romania, Moldavia to Ukraine needs to be placed under the same protective umbrella of elevated protection. A similar approach also needs to be applied for the Greece-North Macedonia gas interconnector (IGNM) that is currently under construction on the western side of the Balkans. Once completed, the IGNM will enable reverse-flow transmission of LNG-derived gas from Greek terminals toward the Western Balkans, directly displacing Russian volumes entering the region from the east. Construction progress on the project has already been problematic with the pipeline facing bureaucratic and environmental permitting delays in its North Macedonia section. The completion of the pipeline could be susceptible to external interference from the state actors that stand to lose regional influence by its competition.

Interference and disruption of the Greek LNG terminals, the IGNM, the IGB and the Vertical Corridor pipelines would aim at slowing or even canceling the integration of Balkan and SE Europe gas markets into the European framework thus constituting the operation of the Turkish Stream pipeline still necessary for the region.

Ensuring the rigorous and multi-layered protection of Greece's energy infrastructure, physical, digital, and operational, is therefore strategically essential. The resilience of LNG terminals, transmission networks and interconnectors with the Balkans will determine not only Greece's reliability as a transit spot, but also the overall security of the emerging transatlantic energy corridor extending from the Eastern Mediterranean to Central Europe and Ukraine.

Market impact and the myth of rising gas prices

One recurring misconception in public debate is that the reduction of Russian pipeline gas imports, especially through the Turkish Stream pipeline, will inevitably raise gas prices in Greece. This assumption is incorrect.

Market fundamentals show that global LNG supply has been consistently increasing since 2023, driven by U.S. and Qatari production. Overall, European gas prices have stabilized well below the crisis peaks of 2022, with forward curves indicating continued downward pressure. The marginal cost of U.S. LNG delivery to the Eastern Mediterranean remains competitive, especially as freight rates normalize and regasification bottlenecks ease.

Therefore, the progressive disengagement from Russian supplies is not only politically sustainable but also economically sound. Greece will continue to benefit from competitive gas prices, provided that it expands its import and transmission capacity to absorb global oversupply efficiently.

The end of the EastMed pipeline illusion

Amid the renewed enthusiasm around Athens' upgraded role, voices occasionally resurface promoting the revival of the EastMed pipeline project. Technically ambitious and politically appealing in earlier years, the project no longer reflects market or resource realities. The Eastern Mediterranean's gas export capacity remains insufficient for large-scale exports since:

- Cyprus has yet to bring any field to production;
- Egypt is currently importing gas from Israel rather than exporting;
- Israel's export capacity is almost exclusively directed towards Egypt and Jordan.

Under these conditions, the EastMed pipeline cannot be commercially justified, at least not until new, large quantities of gas are discovered. A more rational regional structure would involve a, much shorter, pipeline from the Israeli offshore gas fields towards Cyprus in order to solely cover Cypriot needs thus facilitating more localized trade activity rather than a multi-billion-euro subsea export pipeline to Europe.

Domestic production prospects and the exploration dilemma

The renewed presence of ExxonMobil in Greek upstream concessions, most recently its acquisition of majority participation in Block 2, in the Ionian Sea west of Corfu, has generated optimism regarding Greece's potential transition from a gas importer to gas producer and net gas exporter. Yet, this development should be interpreted cautiously. Exxon has held majority positions in Greece for years, in the promising offshore blocks South and Southwest of Crete. The new participation in Block 2 does not yet amount to a drilling commitment. What will truly signal a breakthrough is the formal submission of a drilling petition to the Greek authorities, an act that would demonstrate operational and financial commitment.

If such a decision is submitted before the deadline in the next four to five months, it would mark an important milestone since it would be the first activity of its kind in the last 40 years in Greece. Even more importantly, the possibility of Exxon actually initiating drilling activities in the Ionian sea, would generate tangible expectation that the company would actually then proceed with its long-expected explorational drilling in the offshore fields South and Southwest of Crete.

A drilling campaign in Crete, in an area where Greece has declared the potential outer limits of its EEZ under the principle of the median line, would not only open the path for domestic hydrocarbon production but would also consolidate Greece's de facto exercise of sovereign rights within its perceived Exclusive Economic Zone determined under the median line principle. However, until all the exploratory drilling activity actually initiates, exploration remains more of a strategic potential rather than a realized advantage.

LNG infrastructure as a bridge to strategic autonomy

The simultaneous evolution of Greece as both a gateway for transatlantic gas and a potential source of domestic supply creates a unique duality. On one hand, Athens serves the collective objective of diversifying European supply routes. On the other, it lays the technical foundation for future self-sufficiency and export capability.

The potential discovery of natural gas in the Block 2 offshore field in the Ionian sea would most likely be transported by pipeline infrastructure to the Greek mainland and then to the rest of Europe, or even also by pipeline to Italy. For the much bigger offshore fields in Crete, however, should viable quantities of natural gas be discovered by Exxon or Chevron in the future, liquefaction at source, through Floating Liquefied Natural Gas (FLNG) facilities would be a more efficient export solution than constructing new pipelines toward mainland Greece. In such a case this would integrate efficiently with the existing LNG terminal network in the country, reinforcing Greece's long-term position in regional energy logistics.

The policy implication is clear: Greece must pursue redundancy in reception capacity. Each LNG terminal, the existing in Revithoussa and Alexandroupolis, and the planned ones in Corinth, Volos and possibly Thessaloniki, adds resilience and negotiating power, ensuring flexibility not only for imports but also for potential exports in the future.

Conclusion: A Strategic Outlook on a Transatlantic Corridor through Greece

The structural outcome of the 6th P-TEC meeting is the consolidation of a south-north energy corridor, beginning at Greek ports and extending through the Balkans toward Southeast and Central Europe, all the way to Ukraine. This corridor is not a single pipeline but an interconnected system of LNG terminals, interconnectors, and harmonized market frameworks operating under transatlantic coordination.

For the United States, this marks the first time since the end of the Cold War that Washington can directly shape the energy landscape of NATO's eastern flank. For the European Union, it represents a concrete pathway toward strategic autonomy from Russian energy. And for Greece, it is both an opportunity and a responsibility: to uphold regulatory credibility, technical efficiency, diplomatic balance and operational security in managing infrastructures that have now become integral to the collective security of the Euro-Atlantic space.

Looking ahead, the potential realization of offshore exploration projects, particularly in the Ionian and Cretan basins, could further consolidate Greece's role, complementing its transit capacity with domestic production potential. If realized, these developments would transform Greece from a regional conduit into a strategic energy actor, reinforcing both its national resilience and its contribution to Europe's long-term energy security.





Democracy, Identity, Culture

Economic inequalities: consequences, ineffective policies and an original proposal for their mitigation

Economic inequalities: consequences, ineffective policies and an original proposal for their mitigation

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ΠΕΡΙΛΗΨΗ

- Οι εγχώριες οικονομικές ανισότητες έχουν φτάσει σήμερα σε πολύ υψηλά επίπεδα τόσο στον αναπτυγμένο όσο και στον αναπτυσσόμενο κόσμο.
- Τούτη η μελέτη διερευνά τις επιπτώσεις τους, τις μελλοντικές προοπτικές τους, καθώς και τις κυριότερες αναδιανεμητικές πολιτικές που προτείνονται για να τις αμβλύνουν.
- Διαπιστώνεται αφενός η αυξητική τάση και η εκρηκτική δυναμική των οικονομικών ανισοτήτων, αφετέρου η αναποτελεσματικότητα των προτεινόμενων αναδιανεμητικών πολιτικών.
- Αν θέλουμε να συγκρατήσουμε τις εντεινόμενες ανισοτικές τάσεις του σύγχρονου κόσμου και να περιορίσουμε τις δυσμενείς επιπτώσεις τους στην οικονομία και την κοινωνία, πρέπει να επινοήσουμε νέα εργαλεία αναδιανομής του πλούτου.
- Ένα τέτοιο εργαλείο θα ήθελα να προτείνω εδώ. Το ονομάζω «εθελούσιοι φόροι με προνόμια».

ΕΙΣΑΓΩΓΗ

Η οικονομική ανισότητα έχει εκτοξευθεί τις τελευταίες δεκαετίες στις περισσότερες χώρες του πλανήτη. Πέραν της ηθικής διάστασης του προβλήματος, τούτο έχει και μια σειρά από δυσμενείς συνέπειες στις οικονομίες αυτών των χωρών. Η ακραία οικονομική ανισότητα επιβραδύνει την οικονομική μεγέθυνση, αυξάνει το υψηλό ρίσκο ιδιωτικό χρέος, αυξάνοντας έτσι τη συχνότητα και την ένταση των χρηματοπιστωτικών κρίσεων, επιβαρύνει το δημόσιο χρέος εξαιτίας των αυξημένων δαπανών πρόνοιας, ενώ ταυτόχρονα προκαλεί και μια ανορθολογική κατανομή των παραγωγικών πόρων της οικονομίας. Βεβαίως, η ανισότητα δεν έχει μόνο οικονομικές συνέπειες, αλλά και σοβαρότατες κοινωνικές και πολιτικές επιπτώσεις: υποβαθμίζει την εκπαίδευση και την υγεία πολλών πολιτών, προκαλεί κοινωνικές και πολιτικές εντάσεις, υποθάλπει τη διαπλοκή και την πολιτική διαφθορά και αυξάνει την εγκληματικότητα. Η ανισότητα διαρρηγνύει την κοινωνική συνοχή και πλήττει καίρια τη δημοκρατία περισσότερο από κάθε άλλο παράγοντα. Επιπλέον, όπως αποδεικνύουν πρόσφατες έρευνες (προεξάρχουσας εκείνης του Piketty), η τάση των εγχώριων οικονομικών ανισοτήτων είναι αυξητική και η δυναμική τους εκρηκτική και ανεξέλεγκτη. Είναι προφανές πως η τάση αυτή εγκυμονεί σοβαρότατους οικονομικούς, κοινωνικούς και πολιτικούς κινδύνους στο μέλλον. Η ιστορική εμπειρία αποδεικνύει πως η ακραία ανισότητα μπορεί να μας οδηγήσει μέχρι την ολοκληρωτική καταστροφή. Είναι πλέον επιτακτικό να δράσουμε για να συγκρατήσουμε τις τερατώδεις ανισότητες του σύγχρονου κόσμου.

Η μείωση της ανισότητας απαιτεί έναν συνδυασμό προληπτικών και αναδιανεμητικών (μέσω, κυρίως, της φορολόγησης) μέτρων. Εστιάζοντας στα δεύτερα, θα αποδείξω πως τόσο οι εφαρμοζόμενες όσο και οι προτεινόμενες φορολογικές πολιτικές είναι σε μεγάλο βαθμό αναποτελεσματικές. Αν θέλουμε να συγκρατήσουμε τις εντεινόμενες ανισοτικές τάσεις του σύγχρονου κόσμου, θα πρέπει να επινοήσουμε νέα εργαλεία αναδιανομής του πλούτου. Ένα τέτοιο εργαλείο θα ήθελα να προτείνω εδώ. Το εργαλείο αυτό είναι οι «εθελούσιοι φόροι με προνόμια».

Οι οικονομικές, κοινωνικές και πολιτικές επιπτώσεις της ανισότητας

Πλήθος οικονομικών μελετών αποδεικνύει πως η ακραία ανισότητα επιβραδύνει την οικονομική μεγέθυνση (βλέπε, ενδεικτικά, Aghion κ.ά., 1999· Rodrik, 1999· Berg and Ostry, 2011· και Stiglitz, 2015). Τούτο ισχύει για δύο τουλάχιστον λόγους: πρώτον, διότι εμποδίζει την πρόσβαση σε ποιοτική εκπαίδευση στους φτωχότερους πολίτες, μειώνοντας έτσι τις επενδύσεις σε ανθρώπινο κεφάλαιο (πράγμα που πλήττει καίρια την ανάπτυξη μακροπρόθεσμα)· και δεύτερον, διότι μειώνει τις δύο βασικές συνιστώσες της ζήτησης, την κατανάλωση και την επένδυση. Ας δούμε γιατί συμβαίνει το τελευταίο.

Όπως επισήμανε πρώτος ο John A. Hobson ήδη από τις αρχές του 20ου αιώνα (και αργότερα υπερθεμάτισε ο Keynes), η άνιση κατανομή των εισοδημάτων οδηγεί σε μια παράδοξη κατάσταση στην οποία ούτε οι φτωχοί ούτε οι πλούσιοι μπορούν να καταναλώσουν αρκετά αγαθά: οι φτωχοί επειδή έχουν πολύ λίγα χρήματα και οι πλούσιοι επειδή έχουν πάρα πολλά για να τα ξοδέψουν. Στη γλώσσα των οικονομικών, θα λέγαμε πως η οριακή και η μέση ροπή κατανάλωσης μειώνεται καθώς αυξάνεται το ατομικό εισόδημα (όπως υπέδειξε ο Keynes). Η μειωμένη κατανάλωση, με τη σειρά της, εξασθενεί τα περιθώρια κέρδους των επιχειρήσεων, με αποτέλεσμα οι επενδύσεις στην «πραγματική οικονομία» να είναι φειδωλές.

Τα τελευταία χρόνια ο δυτικός καπιταλισμός έχει πέσει σε αυτό που ο Keynes αποκάλεσε «παγίδα ρευστότητας» (liquidity trap). Η αβεβαιότητα που επικρατεί στην παγκόσμια οικονομία -εν μέρει λόγω της μειωμένης ζήτησης εξαιτίας της ακραίας εισοδηματικής ανισότητας, εν μέρει λόγω της χρηματοπιστωτικής και γεωπολιτικής αστάθειας- αναγκάζει τις επιχειρήσεις και τους μετόχους τους να αποθησαυρίζουν χρήματα αντί να τα επενδύουν, οδηγώντας την οικονομία σε ένα υφεσιακό σπирάλ. Ατράνταχτη απόδειξη γι' αυτό αποτελούν οι συνεχείς «επαναγορές μετοχών» αξίας αρκετών τρισεκατομμυρίων δολαρίων κατά τις τελευταίες δεκαετίες. Είναι χαρακτηριστικό πως την περίοδο 2003-2012, 449 κορυφαίες αμερικανικές εταιρείες διέθεσαν το 54% των συνολικών τους κερδών στην επαναγορά των μετοχών τους (περίπου 2,4 τρισεκατομμύρια δολάρια) και το 37% στη διανομή μερισμάτων, αφήνοντας έτσι μόνο το 9% των κερδών για επενδυτικούς σκοπούς (Lazonick, 2014). Οι «επαναγορές μετοχών», ως γνωστόν, συνεχίζονται με αμείωτο -αν όχι και αυξανόμενο- ρυθμό μέχρι σήμερα.

Πέραν των υφεσιακών τάσεων που προκαλεί, η οικονομική ανισότητα αυξάνει και το υψηλό ρίσκο ιδιωτικό χρέος, αυξάνοντας έτσι τη συχνότητα και την ένταση των χρηματοπιστωτικών κρίσεων. Χαρακτηριστική είναι η περίπτωση της παγκόσμιας χρηματοπιστωτικής κρίσης του 2007-8. Η κρίση, ως γνωστόν, ξεκίνησε από τις ΗΠΑ λόγω της αδυναμίας εξυπηρέτησης των περιβόητων *ενυπόθηκων στεγαστικών δανείων υψηλού κινδύνου* (subprime loans), τα οποία είχαν χορηγηθεί σε νοικοκυριά με πενιχρούς οικονομικούς πόρους. Η εισοδηματική καθήλωση των λαϊκών τάξεων κατά τις προηγούμενες δεκαετίες ήταν που οδήγησε στη σύναψη αυτών των δανείων, αλλά και στην αδυναμία αποπληρωμής τους αργότερα (Piketty, 2014, σ. 366).

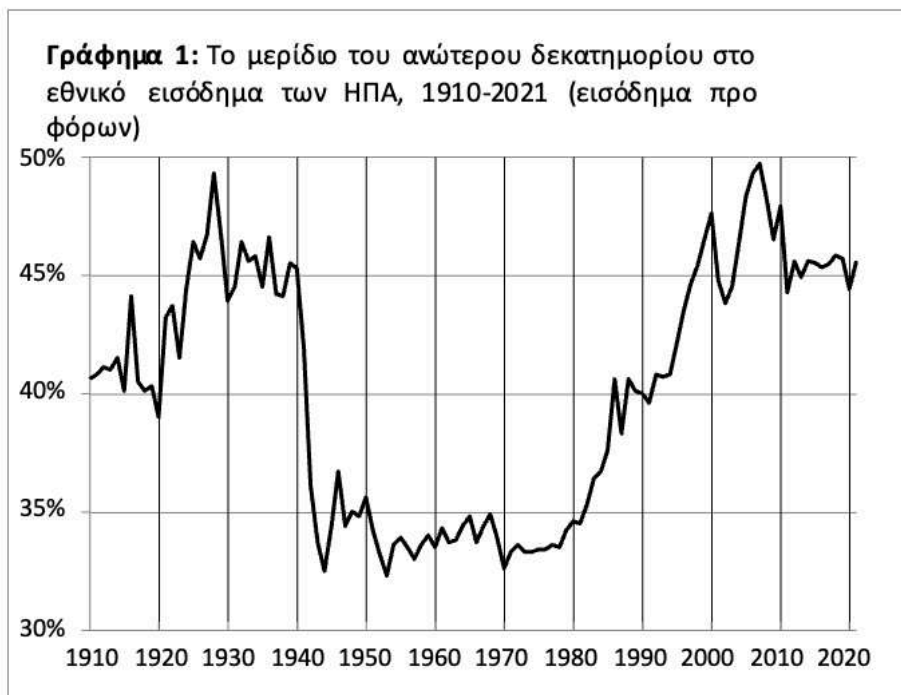
Βεβαίως, η ανισότητα δεν αυξάνει μόνο το ιδιωτικό, αλλά και το δημόσιο χρέος: αφενός διότι δημιουργεί την ανάγκη στήριξης των φτωχότερων πολιτών και αυξάνει τις δαπάνες κοινωνικής πρόνοιας, αφετέρου διότι συμπιέζει τη φορολογική βάση (Aizenman and Jinjarak, 2012) και μειώνει τα φορολογικά έσοδα (Fenochietto and Pessino, 2013· Bird κ.ά., 2014). Αν και για το τελευταίο υπάρχουν κάποιες διαφωνίες (π.χ. Boustan, 2013), θα πρέπει να εμπιστευτούμε την κοινή λογική: οι φόροι τόσο των ακραία φτωχών όσο και των ακραία πλουσίων είναι μειωμένοι εξαιτίας του χαμηλού εισοδήματος και της υψηλής φοροδιαφυγής/φοροαποφυγής αντιστοίχως.

Επιπλέον, η ακραία ανισότητα προκαλεί μια ανορθολογική κατανομή των παραγωγικών πόρων, διότι κατευθύνει ένα μέρος της ζήτησης σε υπερπολυτελή και άχρηστα αγαθά. Σήμερα υπάρχουν άνθρωποι που αγοράζουν οικόπεδα στη Σελήνη ή ολόκληρους μετεωρίτες, άλλοι φτιάχνουν πολυτελέστατα ιδιωτικά καταφύγια για να γλιτώσουν από κάποιον επερχόμενο Αρμαγεδδώνα και από το «τέλος του κόσμου», ενώ άλλοι δαπανούν κολοσσιαία ποσά σε έργα τέχνης ή είδη διακόσμησης. Είναι προφανές πως οι πόροι της οικονομίας θα μπορούσαν να χρησιμοποιηθούν με τρόπο επωφελέστερο για το κοινωνικό σύνολο.

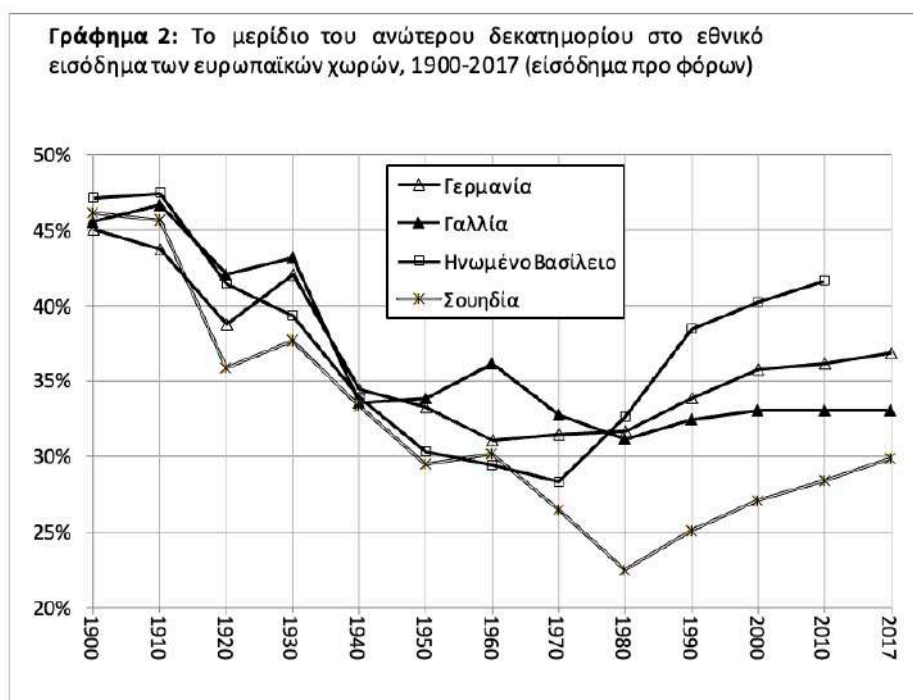
Βεβαίως, η ανισότητα δεν έχει μόνο οικονομικές συνέπειες, αλλά και σοβαρότατες κοινωνικές και πολιτικές επιπτώσεις. Η οικονομική ανισότητα προκαλεί και εκπαιδευτική ανισότητα (ιδίως στις αγγλοσαξονικές χώρες, όπου τα διδάκτρα των κολεγίων είναι υπέρογκα), υποβαθμίζει την υγεία πολλών πολιτών, υποθάλλει τη διαπλοκή και την πολιτική διαφθορά και αυξάνει την εγκληματικότητα. Η ανισότητα διαρρηγνύει την κοινωνική συνοχή και πλήττει καίρια τη δημοκρατία περισσότερο από κάθε άλλο παράγοντα. Οι κλιμακούμενες κοινωνικές εντάσεις, τα κινήματα διαμαρτυρίας, η άνοδος του πολιτικού λαϊκισμού και η φθίνουσα συμμετοχή των πολιτών στις εκλογικές διαδικασίες σε όλο τον δυτικό κόσμο πρέπει να μας προβληματίσουν όλους. Η φιλελεύθερη καπιταλιστική κοινωνία βαδίζει πλέον σε έναν ιδιαίτερα ολισθηρό δρόμο, από τον οποίο εύκολα μπορεί να ξεστρατίσει προς επικίνδυνες ατραπούς.

Ας μείνουμε όμως στην οικονομική διάσταση του ζητήματος και ας ρίξουμε μια προσεκτική ματιά στο Γράφημα 1, το οποίο παρουσιάζει το μερίδιο του ανώτερου δεκατημορίου της εισοδηματικής ιεραρχίας στο εθνικό εισόδημα των ΗΠΑ τον τελευταίο αιώνα. Είναι άραγε τυχαίο το γεγονός ότι η ανισότητα έφτασε στα δύο ιστορικά της ρεκόρ παραμονές των δύο μεγαλύτερων κρίσεων του καπιταλισμού; Όπως φαίνεται στο γράφημα, οι δύο κορυφές του ανωτέρω μεριδίου χρονολογούνται το 1928 (παραμονές του κραχ του 1929) και το 2007 (παραμονές της παγκόσμιας κρίσης του 2008). Ο Piketty δεν πιστεύει πως πρόκειται για σύμπτωση (Piketty, 2014, σ. 366). Ήδη από τις αρχές του 19ου αιώνα, όταν και πρωτοδιατυπώθηκε η θεωρία των οικονομικών κύκλων, η ανισότητα θεωρήθηκε ως μία από τις βασικότερες αιτίες πρόκλησης οικονομικών κρίσεων. Η ανισότητα μπορεί να προκαλέσει κρίση με διάφορους τρόπους: στην περίπτωση της κρίσης του 1929, συρρίκνωσε την κατανάλωση, υποσκάπτοντας έτσι τα περιθώρια κέρδους των επιχειρήσεων και τις επενδύσεις (Heilbroner and Milberg, 2010, σ. 219-220), ενώ στην περίπτωση της κρίσης του 2008 απογείωσε το χρέος των λαϊκών τάξεων, οδηγώντας τελικά στην αδυναμία αποπληρωμής του.

Ας ρίξουμε τώρα μια ματιά στο Γράφημα 2, όπου απεικονίζεται το μερίδιο του ανώτερου δεκατημορίου στο εθνικό εισόδημα των ευρωπαϊκών χωρών τον τελευταίο αιώνα (παρουσιάζεται ο μέσος όρος αυτού του μεριδίου ανά δεκαετία για να καταδειχθεί η μακροπρόθεσμη τάση του). Στη Γηραιά Ήπειρο, η ανισότητα έφτασε στο αποκορύφωμά της παραμονές μιας διαφορετικής καταστροφής: του Α' Παγκοσμίου Πολέμου (με το μερίδιο του ανώτερου δεκατημορίου να είναι αντίστοιχο με εκείνο στις ΗΠΑ παραμονές των δύο μεγάλων κρίσεων - κοντά στο 50%). Άλλη μια σύμπτωση; Δεν το νομίζω. Η ακραία ανισότητα της προπολεμικής Ευρώπης συντέλεσε αποφασιστικά στην άνοδο του ιμπεριαλισμού (Hobson, 1932). Μειώνοντας δραστικά την εγχώρια ζήτηση και την επιχειρηματική κερδοφορία, ώθησε το κεφάλαιο να βρει διέξοδο σε αγορές του εξωτερικού και ανάγκασε τις μεγάλες ευρωπαϊκές δυνάμεις να επιδοθούν σε έναν ανελέητο αποικιοκρατικό ανταγωνισμό, ο οποίος κατέληξε στον πόλεμο.



Πηγή: piketty.pse.ens.fr/capital21c, World Inequality Database



Πηγή: piketty.pse.ens.fr/capital21c, World Inequality Database

Βλέπουμε, λοιπόν, πως οι τρεις περίοδοι της σύγχρονης Ιστορίας με τις μεγαλύτερες οικονομικές ανισότητες στον δυτικό κόσμο -η δεκαετία του 1920 και του 2000 στις ΗΠΑ και η τελευταία δεκαετία της Belle Époque στην Ευρώπη- σηματοδεύτηκαν από ισάριθμες καταστροφές: δύο κατακλυσμιαίες οικονομικές κρίσεις και έναν παγκόσμιο πόλεμο. Βεβαίως υπεραπλουστεύω εδώ. Οι καταστροφές αυτές είχαν προφανώς πολλά και ποικίλα αίτια. Ωστόσο, η ανισότητα, και στις τρεις περιπτώσεις, ήταν ένα από τα πλέον σημαντικά.

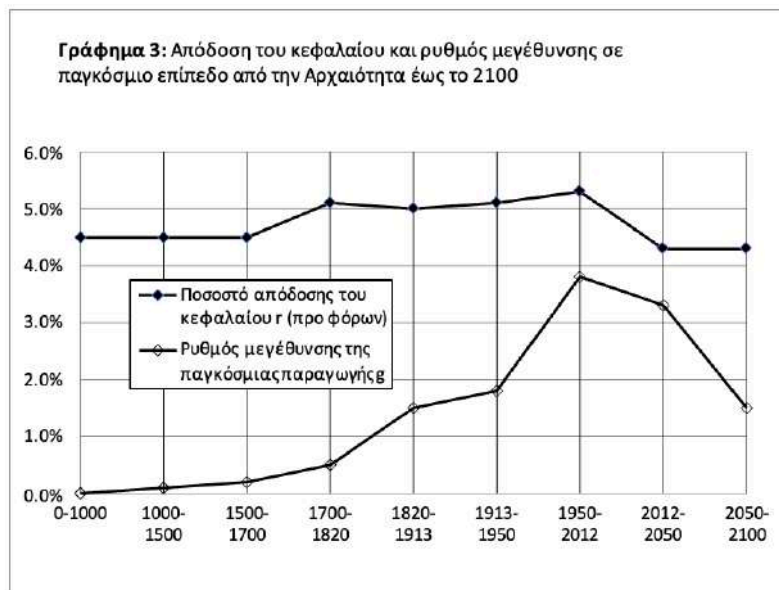
Δυσοίωνες προβλέψεις για τη μακροπρόθεσμη εξέλιξη των οικονομικών ανισοτήτων

Σύμφωνα με τον Piketty, οι οικονομικές ανισότητες παρουσιάζουν μια εκρηκτική δυναμική υπό καπιταλιστικές συνθήκες. Το βασικό του επιχείρημα συμπυκνώνεται σε μια απλή ανίσωση: $r > g$. Βασιζόμενος σε εμπειρικά στοιχεία, ο Piketty διαπιστώνει πως καθ' όλη τη διάρκεια της ανθρώπινης Ιστορίας το ποσοστό απόδοσης του κεφαλαίου (δηλαδή πόσο αποδίδει κατά μέσο όρο το κεφάλαιο ετησίως με τη μορφή κερδών, τόκων, μισθωμάτων ή μερισμάτων) είναι σταθερά και έντονα υψηλότερο από τον ρυθμό μεγέθυνσης της οικονομίας (δηλαδή την ετήσια ποσοστιαία αύξηση του συνολικού εισοδήματος). Η ανίσωση $r > g$ επιτρέπει στις περιουσίες που προέρχονται από το παρελθόν να αυξάνονται ταχύτερα από το σύνολο της οικονομίας και στους ιδιοκτήτες της να κυριαρχούν απόλυτα πάνω στους μισθωτούς. Οι κληρονόμοι αυτών των περιουσιών, ακόμα κι αν δεν εργάζονται, αρκεί να αποταμιεύουν ένα μέρος από τα εισοδήματα των περιουσιών τους (και εν συνεχεία να το επανεπενδύουν), ώστε αυτές να αυξάνονται γοργά και αδιάκοπα. Η δυναμική είναι εκρηκτική μακροπρόθεσμα. Το κεφάλαιο συσσωρεύεται και συγκεντρώνεται όλο και περισσότερο σε μια μικρή μερίδα του πληθυσμού (Piketty, 2014, σ. 46).

Παρά την κριτική που έχει δεχθεί ο Piketty για την ακρίβεια των αριθμητικών στοιχείων που παραθέτει (βλέπε Giles and Giugliano, 2014) και τη μεθοδολογία που ακολουθεί (βλέπε Summers, 2014· και Acemoglu and Robinson, 2015), το βασικό του επιχείρημα δεν μπορεί να αμφισβητηθεί: η ανίσωση $r > g$ ισχύει διαχρονικά (ιδιαίτερως μέσα σε έναν κόσμο χαμηλής οικονομικής μεγέθυνσης, όπως ο σημερινός), δημιουργώντας έτσι τις προϋποθέσεις για μια αδιανόητη έκρηξη των οικονομικών ανισοτήτων στο μέλλον.

Φυσικά, όσο μεγαλύτερη είναι η απόκλιση της απόδοσης του κεφαλαίου από τον ρυθμό μεγέθυνσης της οικονομίας τόσο επιταχύνεται η δυναμική της ανισότητας. Το Γράφημα 3 παρουσιάζει την απόκλιση αυτών των δύο μεγεθών διαχρονικά, από την Αρχαιότητα μέχρι το 2100. Ο Piketty προβλέπει πως η απόκλιση αυτή θα διευρυνθεί κατά τον 21ο αιώνα εξαιτίας των πτωτικών ρυθμών οικονομικής μεγέθυνσης, εκτοξεύοντας την ανισότητα σε πρωτοφανή επίπεδα. Όμως τα πράγματα φαίνεται πως είναι ακόμη χειρότερα: οι προβλέψεις του Γάλλου οικονομολόγου για τους ρυθμούς μεγέθυνσης της παγκόσμιας οικονομίας είναι υπερβολικά αισιόδοξες (πράγμα που παραδέχεται και ο ίδιος), καθώς υποθέτουν μια διαρκή αύξηση της παραγωγικότητας στον αναπτυσσόμενο κόσμο, καθώς και μια αδιάκοπη πορεία σύγκλισης στον αναπτυσσόμενο δίχως πολιτικά και στρατιωτικά προσκόμματα (Piketty, 2014, σ. 133-134). Η εποχή της «πολυκρίσης» στην οποία έχει εισέλθει πλέον η ανθρωπότητα -μιας κρίσης γεωπολιτικής, ενεργειακής, πληθωριστικής, τραπεζικής και δημογραφικής- ρίχνει βαριά τη σκιά της στην προοπτική της οικονομικής μεγέθυνσης μακροπρόθεσμα και συνεπώς στην εξέλιξη των οικονομικών ανισοτήτων.

Πέραν της ανάλυσης του Piketty, υπάρχουν πολλές ακόμα μελέτες που προβλέπουν την όξυνση των οικονομικών ανισοτήτων στο μέλλον (βλέπε, ενδεικτικά, World Bank, 2023· Qureshi, 2023· και Menon, 2023). Οι μελέτες αυτές επικαλούνται τέσσερις βασικές αιτίες: α) την τεχνολογική εξέλιξη, β) την κλιματική αλλαγή, γ) την οικονομική στασιμότητα και δ) την υψηλή συχνότητα εμφάνισης κρίσεων (οικονομικών, γεωπολιτικών, υγειονομικών και περιβαλλοντικών) στις σύγχρονες κοινωνίες. Ίσως η πιο απαισιόδοξη -κι όμως ανατριχιαστικά ρεαλιστική- είναι εκείνη του Randall Collins (2013), η οποία δίνει έμφαση στον ρόλο της τεχνολογίας. Ο Collins υποστηρίζει πως η πρόοδος της πληροφορικής και της τεχνητής νοημοσύνης θα αφανίσει εκατοντάδες υπαλληλικά, διοικητικά και προγραμματιστικά επαγγέλματα στο άμεσο μέλλον, αφήνοντας άνεργη τη μεσαία τάξη και βυθίζοντάς την στη φτώχεια (η μελέτη αναφέρει ποσοστά ανεργίας της τάξης του 50 με 70% από τα μέσα του 21ου αιώνα). Μέσα σε αυτή τη δυστοπική κοινωνία θα αναδειχθεί μια олигархия ελίτ ιδιοκτητών ρομπότ, η οποία θα πλουτίσει αδιανόητα. Ο Collins πιστεύει πως, ενώ στο παρελθόν το καπιταλιστικό σύστημα έβρισκε τρόπους να συγκρατεί την τεχνολογική ανεργία και την ανισότητα (μέσω κεύνσιανών πολιτικών, χρηματοπιστωτικών εργαλείων, της παγκοσμιοποίησης των αγορών και της δημιουργίας νέων θέσεων εργασίας από την τεχνολογία), οι τρόποι αυτοί έχουν φτάσει πλέον στα όριά τους και δεν μπορούν να αποδώσουν περαιτέρω. Το συμπέρασμα του είναι ζοφερό: η ανισότητα θα εκτοξευτεί σε αδιανόητα επίπεδα στο άμεσο μέλλον, οδηγώντας στην κατάρρευση του καπιταλισμού.



Πηγή: piketty.pse.ens.fr/capital21c

Τα όρια της αποτελεσματικότητας των αναδιανεμητικών πολιτικών

Έως τώρα έχω αναφερθεί στις δυσμενείς επιπτώσεις που έχει η οικονομική ανισότητα στην οικονομία και την κοινωνία, καθώς και στη ζοφερή προοπτική της μακροπρόθεσμα. Οι ακραίες οικονομικές ανισότητες μπορούν να μας οδηγήσουν μέχρι και την ολοκληρωτική καταστροφή, όπως έκαναν στην περίπτωση της κρίσης του 1929 και του 2008 στις ΗΠΑ, αλλά και στην περίπτωση του Α' Παγκοσμίου Πολέμου. Έχουμε πάρει το μάθημά μας; Τι κάνουμε σήμερα καθώς οι ανισότητες προσεγγίζουν και πάλι επικίνδυνα –ή και ξεπερνούν– τα ιστορικά τους ρεκόρ; Ένα από τα θλιβερότερα διδάγματα της Ιστορίας είναι πως μόνο η καταστροφή μπορεί να μειώσει δραστικά την ανισότητα (όπως δείχνουν τα γραφήματα 1 και 2, η ανισότητα μειώνεται απότομα μόνο κατά τη διάρκεια των πολέμων και των μειζόνων οικονομικών κρίσεων). Θα περιμένουμε, λοιπόν, την επόμενη καταστροφή –την επόμενη μεγάλη κρίση ή τον επόμενο παγκόσμιο πόλεμο– ή μήπως θα δράσουμε επιτέλους για να συγκρατήσουμε τις εντεινόμενες ανισοτικές τάσεις του σύγχρονου κόσμου; Ποιοι θεσμοί και ποιες δημόσιες πολιτικές θα μπορούσαν να υπηρετήσουν έναν τέτοιο σκοπό;

Τα μέτρα για την άμβλυνση της οικονομικής ανισότητας διακρίνονται σε δύο γενικές κατηγορίες: τα προληπτικά (εκείνα δηλαδή που παρεμβαίνουν στους μηχανισμούς που προκαλούν εξαρχής την ανισότητα) και τα αναδιανεμητικά (μέσω, κυρίως, της φορολόγησης). Μια αποτελεσματική πολιτική θα πρέπει προφανώς να περιέχει μέτρα και από τις δύο κατηγορίες. Εδώ θα εστιάσω στη δεύτερη κατηγορία, καθώς είναι η πιο προβληματική. Θα δείξω πως τόσο οι εφαρμοζόμενες όσο και οι προτεινόμενες φορολογικές πολιτικές είναι σε μεγάλο βαθμό αναποτελεσματικές. Εν συνεχεία θα καταθέσω τη δική μου πρόταση.

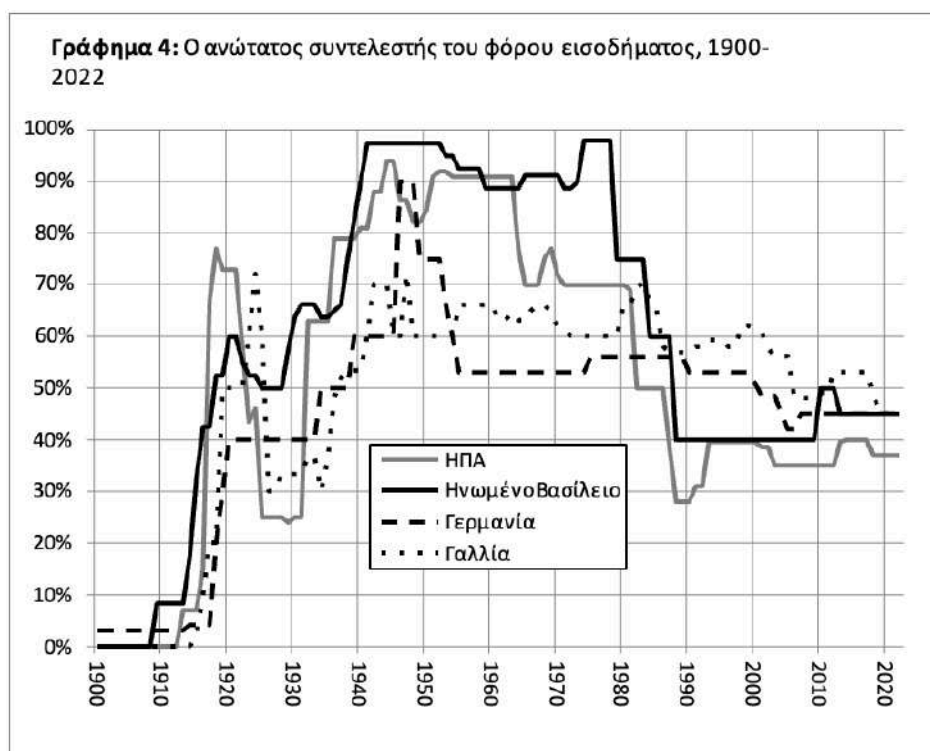
Οι κύριες φορολογικές λύσεις που προτείνονται στον δημόσιο διάλογο και τη διεθνή βιβλιογραφία προκειμένου να αντιμετωπιστεί το πρόβλημα της ανισότητας είναι δύο: α) υπερφορολόγηση των υψηλών κερδών και εισοδημάτων και β) φορολόγηση του κεφαλαίου. Στην κατεύθυνση αυτή, προτείνονται δύο επιπλέον μέτρα για να καταστήσουν τις ανωτέρω λύσεις αποτελεσματικότερες: α) ο συντονισμός των φορολογικών πολιτικών μεταξύ των κρατών και β) η επιβολή κεφαλαιακών ελέγχων. Ας εξετάσουμε καθεμία από αυτές τις προτάσεις ξεχωριστά.

Υπερφορολόγηση των υψηλών κερδών και εισοδημάτων

Η προοδευτική φορολόγηση του εισοδήματος φυσικών και νομικών προσώπων είναι θεωρητικώς το καταλληλότερο εργαλείο αναδιανομής του πλούτου και άμβλυνσης της ανισότητας. Δυστυχώς το εργαλείο αυτό έχει σκουριάσει τα τελευταία χρόνια. Ο διεθνής ανταγωνισμός για την προσέλκυση κεφαλαίων μειώνει διαρκώς τη φορολόγηση των επιχειρήσεων, ενώ την ίδια τάση ακολουθεί και η φορολόγηση των φυσικών προσώπων υπό την πίεση επιμέρους συμφερόντων και αμφιλεγόμενων οικονομικών θεωριών. Στο διάστημα 1980-2022, ο παγκόσμιος μέσος όρος των φορολογικών συντελεστών επί των επιχειρηματικών κερδών έπεσε από το 40,1% στο 23,3%, ενώ στις χώρες του ΟΟΣΑ καταποντίστηκε από το 47% στο 23,5% (Enache, 2022). Παρομοίως, την περίοδο 1978- 2022, ο ανώτατος συντελεστής

του φόρου εισοδήματος φυσικών προσώπων έπεσε σταδιακά από το δημοτικό 98% στο 45% στο Ηνωμένο Βασίλειο, από 70% σε 37% στις ΗΠΑ, από 60% σε 45% στη Γαλλία και από 56% σε 45% στη Γερμανία (βλ. Γράφημα 4). Όλες αυτές οι εξελίξεις έχουν ασφαλώς και την ιδεολογική τους νομιμοποίηση: η φορολόγηση των επιχειρηματικών κερδών υποτίθεται πως στομώνει τον κινητήρα της συσσώρευσης και της ανάπτυξης· αντιθέτως οι φοροελαφρύνσεις και οι φοροαπαλλαγές των επιχειρήσεων προωθούν τις επενδύσεις, ενώ η θεωρία του «trickle-down» διασφαλίζει πως τα οικονομικά οφέλη των επενδύσεων αυτών θα φτάσουν μέχρι και στον τελευταίο πολίτη. Ομοίως, οι νεοκλασικές θεωρίες της προσφοράς εργασίας και της οριακής παραγωγικότητας υποστηρίζουν τη μείωση του φόρου φυσικών προσώπων, διότι προσφέρει κίνητρα για εντατικότερη απασχόληση και αυξάνει την παραγωγικότητα των εργαζομένων. Μερικές από τις θεωρίες αυτές, μάλιστα, φτάνουν στο σημείο να υποστηρίξουν πως οι πλουσιότεροι πολίτες δεν πρέπει να πληρώνουν καθόλου φόρους, ή και να επιδοτούνται ακόμα!

Τούτων λεχθέντων, η λύση της υπερφορολόγησης των υψηλών εισοδημάτων και κερδών αποτελεί ουτοπία. Η διεθνής κινητικότητα του κεφαλαίου που οξύνει τον φορολογικό ανταγωνισμό μεταξύ των κρατών, τα οικονομικά συμφέροντα, αλλά και το κυρίαρχο οικονομικό δόγμα καθιστούν αναποτελεσματικό το εργαλείο της προοδευτικής φορολογίας για την καταπολέμηση της ανισότητας. Η επιτυχία του εργαλείου αυτού προϋποθέτει ένα συντονισμό των φορολογικών πολιτικών παγκοσμίως. Τούτος ο συντονισμός δεν έχει επιτευχθεί σε κανένα πείραμα διακρατικής οικονομικής συνεργασίας, ούτε καν στο πιο επιτυχημένο αυτή τη στιγμή στον κόσμο, την Ευρωπαϊκή Ένωση.



Πηγή: piketty.pse.ens.fr/capital21c, tradingeconomics.com

Φορολόγηση του κεφαλαίου

Η λύση που προτείνει ο ίδιος ο Piketty (καθώς και αρκετοί άλλοι οικονομολόγοι στον κόσμο) είναι η φορολόγηση του κεφαλαίου. Ειδικότερα, προτείνεται ένας ετήσιος προοδευτικός φόρος που θα επιβάλλεται στην αξία της συνολικής περιουσίας κάθε ατόμου, ακίνητης και χρηματοοικονομικής. Βεβαίως, φόροι περιουσίας υπάρχουν αυτή τη στιγμή σε όλα τα κράτη του κόσμου· όμως οι φόροι αυτοί έχουν το μειονέκτημα να είναι ως επί το πλείστον αναλογικοί, να μην λαμβάνουν υπόψη τυχόν δάνεια των φορολογουμένων (με αποτέλεσμα κάποιος με τεράστια χρέη να πληρώνει τον ίδιο φόρο με κάποιον άλλο που δεν χρωστάει τίποτα) και, το σημαντικότερο, να αφορούν αποκλειστικά τα ακίνητα. Ο Γάλλος οικονομολόγος προτείνει η φορολογητέα περιουσία να διευρυνθεί για να συμπεριλάβει εκτός από τα ακίνητα και όλα τα χρηματοοικονομικά στοιχεία που έχει κάποιος στην κατοχή του (καταθέσεις, μετοχές, ομόλογα κ.λπ.), ενώ ταυτοχρόνως να εκκαθαρίζεται από ενδεχόμενα χρέη (Piketty, 2014, σ. 646-649).

Όμως η φορολόγηση του κεφαλαίου σκοντάφτει στα ίδια εμπόδια με τη φορολόγηση του εισοδήματος. Καμιά χώρα δεν θα

τολμούσε να φορολογήσει τα χρηματοοικονομικά περιουσιακά στοιχεία των πολιτών της, καθώς την επόμενη κιόλας μέρα όλος αυτός ο πλούτος θα μετανάστευε στο εξωτερικό. Η δίχως περιορισμούς κινητικότητα του κεφαλαίου παγκοσμίως αποτελεί και πάλι το κύριο εμπόδιο για την καταπολέμηση της ανισότητας μέσω της φορολογικής πολιτικής. Στις ελάχιστες περιπτώσεις που επιβλήθηκε ένας τέτοιος φόρος, ήταν εξαιρετικά συγκρατημένος, αναποτελεσματικός και βραχύβιος¹.

Προκειμένου να αποφευχθεί ο διεθνής φορολογικός ανταγωνισμός που οδηγεί σε υποφορολόγηση, ο Piketty προτείνει τη θέσπιση μιας παγκόσμιας και ενιαίας κλίμακας φορολόγησης του κεφαλαίου. Πρόκειται ασφαλώς για ευσεβή πόθο. Δύσκολα μπορούμε να φανταστούμε όλα τα κράτη της Γης να συμφωνούν σε έναν τέτοιο φόρο, πόσω μάλλον και σε ενιαίους φορολογικούς συντελεστές· εξάλλου, κάθε κράτος έχει διαφορετικές ανάγκες, διαφορετικές οικονομικές αντιλήψεις και διαφορετικά συμφέροντα. Ακόμα δυσκολότερα θα φανταζόμασταν τις τράπεζες και τις φορολογικές αρχές όλων των χωρών του πλανήτη να ανταλλάσσουν μεταξύ τους στοιχεία σχετικά με την ταυτότητα όσων διακρατούν περιουσιακά στοιχεία στο εξωτερικό, για το είδος αυτών των περιουσιακών στοιχείων και για την αξία τους. Τούτο ισχύει πρωτίστως για τους φορολογικούς παραδείσους, οι οποίοι έχουν ζωτικό συμφέρον να αποκρύπτουν τα στοιχεία αυτά. Οι χώρες αυτές οφείλουν το βιοτικό τους επίπεδο στις αθέμιτες χρηματοπιστωτικές τους υπηρεσίες, πάνω στις οποίες έχουν βασίσει ολόκληρη την οικονομία τους. Η χρηματοοικονομική διαφάνεια θα τις οδηγούσε σε μερική ή πλήρη κατάρρευση.

Ο Piketty, βεβαίως, δεν τρέφει αυταπάτες. Γνωρίζει και επισημαίνει όλα τούτα τα εμπόδια. Ωστόσο επιμένει να αισιοδοξεί, χαρακτηρίζει την πρότασή του ως «μια χρήσιμη ουτοπία» και ελπίζει πως κάποια στιγμή στο μακρινό μέλλον θα υιοθετηθεί, έστω και σε περιφερειακό επίπεδο (οι ελπίδες του αφορούν κυρίως την Ευρωπαϊκή Ένωση). Τούτο μου μοιάζει αρκετά μοιρολατρικό. Δεν έχουμε την πολυτέλεια να περιμένουμε το μακρινό μέλλον. Οι ανισότητες οξύνονται όλο και περισσότερο (όπως έχει δείξει ο ίδιος ο Piketty), η φιλελεύθερη καπιταλιστική δημοκρατία παραπαίει, οι κίνδυνοι είναι πλέον ορατοί. Είναι προφανές πως χρειαζόμαστε κάτι περισσότερο από μια «χρήσιμη ουτοπία».

Κεφαλαιακοί έλεγχοι και προστατευτισμός

Οι δύο προαναφερθείσες λύσεις σκοντάφτουν πάνω στο ίδιο εμπόδιο: την οικονομική παγκοσμιοποίηση. Μήπως, λοιπόν, θα έπρεπε να αποκατασταθούν τα οικονομικά σύνορα μεταξύ των κρατών; Μήπως τα κράτη πρέπει να ανακτήσουν τη χαμένη τους κυριαρχία προκειμένου να καταστούν αποτελεσματικότερες οι πολιτικές τους για την καταπολέμηση της ανισότητας; Δεν είναι λίγοι οι οικονομολόγοι που υποστηρίζουν κάτι τέτοιο, ιδίως μετά τη χρηματοπιστωτική κρίση του 2008 (για παράδειγμα, βλέπε Rodrik, 2012).

Στην κατεύθυνση αυτή, προτείνονται δύο συγκεκριμένα μέτρα: οι κεφαλαιακοί έλεγχοι και ο προστατευτισμός. Οι πρώτοι θα περιόριζαν τη διεθνή κινητικότητα του κεφαλαίου και συνεπώς θα φρέναραν τον φορολογικό ανταγωνισμό μεταξύ των κρατών που οδηγεί τους συντελεστές ολοένα και χαμηλότερα. Το επιχείρημα δεν είναι μόνο θεωρητικό: μια εκτεταμένη έρευνα που εξέτασε εμπειρικά στοιχεία από 21 χώρες του ΟΟΣΑ την περίοδο 1982-1999, απέδειξε πως οι έλεγχοι κεφαλαίων ανακόπτουν την πτωτική τάση των φορολογικών συντελεστών (Devereux, Lockwood & Redoano, 2008). Έτσι κάθε χώρα θα μπορούσε να επιλέξει δίχως περιορισμούς το φορολογικό σύστημα που ταιριάζει στις ανάγκες της, ενώ οι φόροι θα μπορούσαν να επιτελέσουν τη βασική τους λειτουργία, δηλαδή την αναδιανομή του πλούτου. Από την άλλη, ο προστατευτισμός με τη μορφή διάφορων μέτρων (δασμοί, επιδοτήσεις, ποσοστώσεις στις εισαγωγές κ.λπ.) αποσκοπεί στην τόνωση της εγχώριας παραγωγής και της απασχόλησης. Προστατεύοντας ιδίως τους πιο ευάλωτους κλάδους από τον διεθνή ανταγωνισμό, θα μπορούσε να συγκρατήσει τις εγχώριες ανισότητες.

Όμως οι λύσεις αυτές ανήκουν στον προηγούμενο αιώνα. Αν εφαρμόζονταν σήμερα ευρέως, θα δημιουργούσαν περισσότερα προβλήματα από όσα θα έλυναν. Καταρχάς, οι κεφαλαιακοί έλεγχοι και οι δασμοί θα μείωναν σε μεγάλο βαθμό τον παγκόσμιο πλούτο. Επιπλέον θα προκαλούσαν μεγάλη ένταση στις σχέσεις μεταξύ των κρατών, τη στιγμή που χρειάζεται όσο ποτέ άλλοτε η διεθνής συνεργασία. Μέσα σε έναν πολυπολικό και άναρχο κόσμο σαν τον σημερινό, έναν κόσμο που συγκλονίζεται από περιφερειακές συγκρούσεις και στερείται ενός κράτους-ηγεμόνα ικανού να διασφαλίσει ένα εύτακτο οικονομικό και πολιτικό περιβάλλον, τα μέτρα αυτά θα ήταν εξαιρετικά επικίνδυνα. Τέλος, ακόμα κι αν οι λύσεις αυτές κατάφερναν να μειώσουν τις εγχώριες ανισότητες, θα αύξαναν τις διακρατικές. Το ελεύθερο εμπόριο και η σταδιακή άρση των κεφαλαιακών ελέγχων τις τελευταίες δεκαετίες έχουν βγάλει από τη φτώχεια πολλές χώρες της Ασίας, της Λατινικής Αμερικής και της Αφρικής. Είναι γεγονός πως η οικονομική παγκοσμιοποίηση ωφελεί πλέον πολύ περισσότερο τον αναπτυσσόμενο κόσμο από όσο τον αναπτυγμένο. Αν επαναφέραμε τους ελέγχους κεφαλαίων και τον προστατευτισμό, θα διακόπταμε τη διαδικασία σύγκλισης στην οποία βρίσκονται οι χώρες αυτές και θα διευρύνουμε το χάσμα μεταξύ του αναπτυσσόμενου και του αναπτυγμένου κόσμου.

Διεθνής συντονισμός των φορολογικών πολιτικών και θέσπιση ελάχιστων συντελεστών φορολόγησης

Βεβαίως, ο φορολογικός ανταγωνισμός μεταξύ των κρατών θα μπορούσε να αμβλυνθεί και με έναν διαφορετικό τρόπο, ο οποίος δεν θα θυσίαζε την οικονομική παγκοσμιοποίηση: τον συντονισμό των φορολογικών πολιτικών διεθνώς. Πράγματι, τον Ιούλιο του 2021 έγινε το πρώτο βήμα. Οι χώρες του G20 συμφώνησαν σε έναν ελάχιστο συντελεστή φορολόγησης των κερδών πολύ μεγάλων επιχειρήσεων (με τζίρο πάνω από 750 εκατομμύρια ευρώ). Αυτός ο κατώτατος συντελεστής ορίστηκε στο 15% και απέσπασε τη συμφωνία 130 χωρών, οι οποίες έχουν γίνει 138 σήμερα.

Παρότι ελπιδοφόρα, τούτη η συμφωνία δεν πρέπει να μας κάνει υπερβολικά αισιόδοξους. Καταρχάς, δεν έχει ακόμα εφαρμοστεί. Από τη διακήρυξη προθέσεων μέχρι την εφαρμογή η απόσταση είναι τεράστια και η εμπειρία δείχνει πως οι φορολογικές ρυθμίσεις πάντα αφήνουν «παραθυράκια» -για να μην πω «πόρτες»- ορθάνοιχτες- για τη φοροαποφυγή και τη φοροδιαφυγή. Ήδη αρκετές χώρες έχουν ζητήσει εξαιρέσεις για ορισμένους τομείς, όπως η έρευνα και ανάπτυξη, ενώ άλλες δίνουν λυσσαλέα μάχη για να προστατέψουν τις ειδικές φορολογικές ζώνες που χρησιμοποιούν για την προσέλκυση επενδύσεων. Επιπλέον, πολλές χώρες έχουν απορρίψει συνολικά τη συμφωνία, πράγμα που την καθιστά σε μεγάλο βαθμό αναποτελεσματική. Τι σημασία έχει αν 138 χώρες κυνηγούν την Google και την Apple για να τις καθίσουν στο φορολογικό σκαμνί, όταν υπάρχει έστω και μία που μπορεί να τους δώσει άσυλο; Για να αποδώσει καρπούς τούτη η συμφωνία, θα πρέπει να τηρηθεί από (σχεδόν) όλα τα κράτη του κόσμου, πράγμα που φαντάζει απίθανο.

Ο ελάχιστος συντελεστής φορολόγησης των εταιρικών κερδών θα μπορούσε να έχει ακόμα και τα αντίθετα αποτελέσματα από τα προσδοκώμενα. Ο μεγάλος κίνδυνος εδώ είναι τούτος ο ελάχιστος συντελεστής του 15% να γίνει και ο μέγιστος. Δεδομένου ότι ο παγκόσμιος μέσος όρος των συντελεστών φορολόγησης εταιρικών κερδών είναι αυτή τη στιγμή αρκετά υψηλότερος (γύρω στο 23%), ο κίνδυνος αυτός είναι αρκετά πιθανός. Συνεπώς, η συμφωνία των G20 θα μπορούσε να αποφέρει ελάχιστα πρόσθετα φορολογικά έσοδα ή ακόμα και να τα μειώσει (Stiglitz, 2021).

Μια τολμηρή πρόταση: οι «εθελούσιοι φόροι με προνόμια» και ο «δρόμος του Potlatch»

Βρισκόμαστε λοιπόν σε αδιέξοδο; Επιτρέψτε μου να απαντήσω με μια σύντομη ιστορία. Τον Νοέμβριο του 2008, εν μέσω παγκόσμιας χρηματοπιστωτικής κρίσης, η βασίλισσα Ελισάβετ της Αγγλίας επισκέφτηκε το London School of Economics. Η βασίλισσα, αφού παρακολούθησε μια παρουσίαση για την οικονομική κρίση από τους καθηγητές της σχολής, έθεσε ένα αμείλικτο ερώτημα: πώς ήταν δυνατό να μην είχε προβλέψει κανείς τούτη την κολοσσιαία κρίση, που είχε φέρει ολόκληρο τον πλανήτη στο χείλος της καταστροφής; Εις απάντηση, έξι μήνες αργότερα, οι καθηγητές έστειλαν στη βασίλισσα μια επιστολή. Η επιστολή τους, σε ελεύθερη μετάφραση, κατέληγε ως εξής: «Κάθε αποτυχία του καπιταλιστικού συστήματος είναι πρωτίστως μια αποτυχία της συλλογικής μας φαντασίας. Αποτυχία να συλλάβουμε τους κινδύνους της οικονομικής μας συμπεριφοράς, αλλά και να επινοήσουμε τα κατάλληλα εργαλεία για να τους αποτρέψουμε»².

Το ίδιο συμβαίνει και με την ανισότητα. Η αποτυχία μας να την περιορίσουμε είναι, πρώτα και κύρια, μια αποτυχία της συλλογικής μας φαντασίας: αποτυχία να αντιληφθούμε τους τεράστιους κινδύνους που αυτή συνεπάγεται, αλλά και να επινοήσουμε αποτελεσματικούς τρόπους αντιμετώπισής της. Οι τερατώδεις ανισότητες του σύγχρονου κόσμου θα διατηρούνται και θα αυξάνονται συνεχώς όσο προσπαθούμε να τις καταπολεμήσουμε με τα παλιά μας εργαλεία. Αυτά τα εργαλεία δεν λειτουργούν πια, έχουν σκουριάσει και στομώσει, πρέπει να εφεύρουμε νέα - εργαλεία έξυπνα, αποτελεσματικά και κοινωνικώς αποδεκτά.

Ένα τέτοιο εργαλείο θα ήθελα να προτείνω εδώ. Το ονομάζω «εθελούσιοι φόροι με προνόμια». Αυτό που προτείνω, κοντολογίς, είναι να δοθούν ισχυρά, μη υλιστικά κίνητρα στους πλούσιους πολίτες για να προσφέρουν ένα μέρος του πλούτου τους στους φτωχότερους. Εφόσον η αναδιανομή του πλούτου δεν μπορεί να επιτευχθεί σε ικανοποιητικό βαθμό μέσω της υποχρεωτικής φορολόγησης, θα μπορούσαμε να την ενισχύσουμε μέσω μιας «εθελοντικής».

Τι είδους ανταλλάγματα μπορούμε να προσφέρουμε στους πλούσιους για αυτό τον σκοπό; Τι θα μπορούσε να τους παρακινήσει να πληρώνουν έναν «εθελούσιο φόρο»; Ικανά κίνητρα θα ήταν η εξουσία, η κοινωνική αναγνώριση, η διασημότητα, η υστεροφημία ή απλώς η ηθική ικανοποίηση. Θα πρέπει, λοιπόν, να προσφέρουμε σε αυτούς τους «φορολογούμενους» αξιώματα, θέσεις εξουσίας, τιμητικά σύμβολα (όπως προτομές σε δημόσιους χώρους και ονοματοδοσίες οδών), δημοσιότητα ή ό,τι άλλο θελήσουν (το οποίο να μην καταπατά τις θεμελιώδεις κοινωνικές αξίες μας). Ο σκοπός είναι ιερός.

Σπεύδω να προλάβω τις αντιρρήσεις σας: δεν προτείνω ασφαλώς να επανέλθουμε σε ένα καθεστώς πλουτοκρατίας. Όπως θα δείξω παρακάτω, τα προσφερόμενα προνόμια (ειδικά η απονομή αξιωμάτων και θέσεων εξουσίας) δεν πρόκειται να θίξουν στο ελάχιστο τις δημοκρατικές διαδικασίες μας. Ας δούμε τώρα τα πράγματα από την αντίθετη σκοπιά. Άραγε θα δεχτούν οι πλούσιοι αυτή την ανταλλαγή; Θα θελήσουν να εξαγοράσουν με τα πλούτη τους τα προνόμια που θα τους προσφέρουμε; Πιστεύω πως ναι. Οι εύποροι πολίτες των σύγχρονων κοινωνιών έχουν σκαρφαλώσει στα δύο τελευταία σκαλοπάτια της πυραμίδας του Maslow. Οι ανάγκες, δηλαδή, που προσπαθούν πλέον να ικανοποιήσουν είναι οι επανομαζόμενες *εγγωιστικές* (το προτελευταίο σκαλοπάτι της πυραμίδας των αναγκών) και οι *ανάγκες αυτοπραγμάτωσης* (ο ακρογωνιαίος λίθος της πυραμίδας, ο οποίος παίρνει διαφορετική μορφή για τον καθένα). Τα προνόμια που θα τους προσφέρουμε αποσκοπούν στην ικανοποίηση αυτών των ύστατων αναγκών. Το τίμημα, αντιθέτως, που τους ζητάμε - υλικός πλούτος - είναι για εκείνους αμελητέο.

Άλλωστε, όπως έχει επισημάνει ο Frank Knight, κανένα ανθρώπινο κίνητρο δεν είναι στην ουσία του υλιστικό. Πίσω από τα υλιστικά κίνητρα κρύβεται η βαθύτερη επιθυμία μας για κύρος, διάκριση, δύναμη ή εξουσία. Σε τούτο συνηγορούν αμέτρητες ανθρωπολογικές έρευνες, με πιο χαρακτηριστικές εκείνες που μελέτησαν τον θεσμό του *Pottlatch*. Ο θεσμός αυτός υπήρξε ιδιαίτερα διαδεδομένος σε όλες τις παραδοσιακές κοινωνίες με τη μία ή την άλλη μορφή και αναφέρεται στην ανταγωνιστική προσφορά δώρων με σκοπό την ανέλιξη στην κοινωνική ιεραρχία. Τα μέλη των κοινωνιών αυτών (ιδίως εκείνα των αριστοκρατικών τάξεων) όφειλαν να υπερασπίζονται την κοινωνική τους θέση και να προσπαθούν να την βελτιώσουν διαρκώς, κάνοντας δώρα ο ένας στον άλλον. Όταν ο Α δεχόταν ένα δώρο από τον Β, όφειλε να ανταποδώσει με ένα δώρο μεγαλύτερης αξίας, ο Β με ένα ακόμη μεγαλύτερης και ούτω καθεξής. Ο ανταγωνισμός αυτός οδηγούσε στην κατασπατάληση σημαντικών περιουσιακών στοιχείων, ενώ πολλές φορές έφτανε μέχρι την πλήρη οικονομική καταστροφή (Eriksen, 2007, σ. 292). Ο υλικός πλούτος δεν είχε σημασία, θυσιάζονταν προκειμένου να κατακτηθεί κοινωνικό κύρος και εξουσία.

Με ανάλογο (αν και όχι τόσο ακραίο) τρόπο αναμένω να συμπεριφερθούν οι άνθρωποι και σήμερα: να *δωρίσουν* ένα μέρος από τα πλούτη τους προκειμένου να ικανοποιήσουν τις μύχιες ανάγκες τους - τις ανάγκες *αυτοπραγμάτωσης* τους. Άλλωστε, δεν χρειάζεται να ανταποκριθούν όλοι· ακόμη και ένα μικρό ποσοστό των εύπορων πολιτών θα ήταν αρκετό για να συγκεντρωθεί ένα σημαντικό χρηματικό ποσό και να μειωθεί δραστικά η ανισότητα (τούτο θα αποδειχθεί παρακάτω με συγκεκριμένα αριθμητικά παραδείγματα). Τα κίνητρα της πληρωμής αυτού του «εθελούσιου φόρου», ωστόσο, δεν θα ήταν μόνο ιδιοτελή. Πολλοί ασφαλώς θα παρακινούνταν από την κοινωνική τους συνείδηση κι από αλtruισμό (η πρότασή μου θα καλλιεργήσει σημαντικά τούτα τα κίνητρα, όπως θα εξηγήσω αργότερα)· άλλοι, ενδεχομένως, από πραγματισμό (κατανοώντας τους τεράστιους κινδύνους που δημιουργεί η ακραία οικονομική ανισότητα, αρκετοί πολυεκατομμυριούχοι σήμερα διαμαρτύρονται για τους ελάχιστους φόρους που πληρώνουν, όπως ο Warren Buffett και ο Bill Gates)· άλλοι, ίσως, από περιέργεια. Σε κάθε περίπτωση, τούτος ο «εθελούσιος φόρος» -τούτος ο «φόρος με προνόμια»- θα μπορούσε να αναβιώσει τον θεσμό του *Pottlatch* στη σύγχρονη κοινωνία.

Έχει έρθει η ώρα να εξειδικεύσω την πρότασή μου, να υποδείξω τους κανόνες και τις διαδικασίες με τις οποίες θα υλοποιηθεί και να διευκρινίσω ορισμένες κρίσιμες λεπτομέρειες που θα την κάνουν πειστικότερη. Το πρώτο που πρέπει να γίνει είναι ο προσδιορισμός των προνομίων που θα προσφερθούν στους «φορολογούμενους». Το έργο αυτό προφανώς θα πρέπει να ανατεθεί σε μια επιτροπή ψυχολόγων και απαιτεί ιδιαίτερη προσοχή, καθώς αποτελεί το κρίσιμότερο στάδιο του όλου εγχειρήματος. Προτάσεις θα μπορούσαν να υποβάλλουν και οι ίδιοι οι «φορολογούμενοι», εκφράζοντας τις προσωπικές τους προτιμήσεις. Σε κάθε περίπτωση, όλα τα προτεινόμενα προνόμια (είτε από τους πολίτες είτε από την επιτροπή) θα αξιολογούνται από μια δεύτερη επιτροπή δεοντολογίας, η οποία θα εξετάζει τη συμβατότητά τους με τις δημοκρατικές μας αρχές και τις βασικές αξίες της κοινωνικής μας συμβίωσης. Επί της διαδικασίας αυτής θα επανέλθω αργότερα.

Ας κάνουμε τώρα την υπόθεση εργασίας ότι τα προσφερόμενα προνόμια σε μια συγκεκριμένη χώρα (και προσαρμοσμένα στην ελληνική πραγματικότητα) είναι τα εξής: α) 300 βουλευτικές έδρες (ανεξάρτητες από τις κανονικές· μιλά για ένα δεύτερο βουλευτικό σώμα, του οποίου οι αρμοδιότητες θα εξηγηθούν σε λίγο), β) 713 έδρες περιφερειακών συμβούλων (ανεξάρτητες από τις κανονικές· οι έδρες αυτές θα συγκροτήσουν ισάριθμα περιφερειακά συμβούλια που θα λειτουργούν παράλληλα με τα κανονικά και με αρμοδιότητες που εξηγούνται αργότερα), γ) 20 προτομές σε δημόσιους χώρους, δ) 20 ονοματοδοσίες οδών, ε) 500 ώρες τηλεοπτικού χρόνου και στ) 500 εκτενή δημοσιεύματα σε ειδησεογραφικές ιστοσελίδες. Τα προνόμια αυτά τίθενται σε ανοιχτές, δημόσιες δημοπρασίες παραμονές των βουλευτικών εκλογών της χώρας, παραμένουν διεκδικήσιμα για ένα εύλογο χρονικό διάστημα και τελικά απονέμονται στους πλειοδότες. (Υπό αυτό το πρίσμα, τούτες οι δημοπρασίες δεν διαφέρουν σε τίποτα από τον θεσμό του *Pottlatch*: εδραιώνουν μια ανταγωνιστική προσφορά *δώρων*, με σκοπό την απόκτηση κοινωνικού και συμβολικού κεφαλαίου). Οι δημοπρασίες προνομίων θα

επαναλαμβάνονται κάθε τετραετία προ των βουλευτικών εκλογών (ή αμέσως μετά). Τα προσφερόμενα προνόμια, δηλαδή, θα έχουν τετραετή διάρκεια, πλην των διάφορων τιμητικών συμβόλων (προτομές, ονοματοδοσίες οδών κ.λπ.) που θα μένουν στη χώρα εσαεί.

Ας περάσουμε τώρα στην επόμενη φάση. Όλες οι προσφορές που κατατέθηκαν στις δημοπρασίες μιας συγκεκριμένης τετραετίας -τόσο εκείνων που πλειοδότησαν όσο και των υπολοίπων- συγκεντρώνονται σε ένα ταμείο. Οι προσφορές αυτές μπορούν να είναι όχι μόνο σε χρήμα, αλλά και σε οποιαδήποτε μορφή χρηματοοικονομικού ή υλικού κεφαλαίου, όπως μετοχές, προθεσμιακές καταθέσεις, ακίνητα κ.λπ. Από δω και πέρα υπάρχουν δύο εναλλακτικοί δρόμοι: το συγκεντρωθέν κεφάλαιο είτε ρευστοποιείται και διανέμεται στους φτωχότερους πολίτες είτε μένει δεσμευμένο στο ταμείο, προσφέροντας μονάχα την απόδοσή του στους δικαιούχους, δηλαδή τόκους, μερίσματα και μισθώματα. Στη δεύτερη περίπτωση, το κεφάλαιο παραμένει στην κυριότητα του αρχικού ιδιοκτήτη με έναν μόνο περιορισμό: αν αποφασίσει να το πουλήσει, θα πρέπει να προσφέρει στο ταμείο κεφάλαιο ίσης αξίας για να μην πλήξει τους δικαιούχους της επικαρπίας του. Αν, για παράδειγμα, ένας μέτοχος θελήσει να πουλήσει τις δεσμευμένες στο ταμείο μετοχές του προκειμένου να επενδύσει σε έναν διαφορετικό κλάδο, θα μπορεί να το κάνει, αρκεί να τις αντικαταστήσει με μετοχές (ή άλλου είδους κεφάλαιο) αντίστοιχης αξίας. Με τη διευθέτηση αυτή δεν παρακωλύεται η επενδυτική δραστηριότητα, ενώ ταυτόχρονα αποθαρρύνονται οι κερδοσκοπικές και βραχυπρόθεσμες χρηματοπιστωτικές ροές που δημιουργούν τεράστια αστάθεια στην οικονομία.

Τη διαχείριση του παραπάνω ταμείου (δηλαδή όλων των «φόρων» που συλλέχθηκαν από τις δημοπρασίες, χρηματικών και υλικών) δεν θα την έχει το κράτος, αλλά οι πλειοδότες των βουλευτικών και περιφερειακών εδρών (με έναν εύλογο καταμερισμό κονδυλίων μεταξύ τους). Τούτοι οι «βουλευτές» και οι «περιφερειακοί σύμβουλοι» θα επιτελούν ένα θεάρεστο έργο: την αναδιανομή του πλούτου και την άμβλυνση της ανισότητας στις σύγχρονες κοινωνίες. Θα προσδιορίζουν τους δικαιούχους, θα «νομοθετούν», θα θέτουν όρους και προϋποθέσεις. Με άλλα λόγια, τούτη η «Βουλή» και τα «Περιφερειακά Συμβούλια» θα λειτουργούν σαν ένα παράλληλο και συμπληρωματικό κράτος πρόνοιας. Εφόσον τα κονδύλια που θα διαχειρίζονται είναι εκτός του κρατικού προϋπολογισμού και ανεξάρτητα των κρατικών εσόδων, η εξουσία που τους εκχωρείται δεν παραβιάζει στο ελάχιστο τις δημοκρατικές διαδικασίες της χώρας.

Ωστόσο, θα μπορούσε εδώ να εκφραστεί μια άλλου είδους κριτική. Όπως προανέφερα, τα όργανα αυτά θα διαχειρίζονται τα κεφάλαια από τις κατατεθειμένες προσφορές όχι μόνο των πλειοδοτών, αλλά και των υπολοίπων συμμετεχόντων στις δημοπρασίες, οι οποίοι δεν κατάφεραν να κερδίσουν κανένα προνόμιο. Τούτο είναι αναγκαίο προκειμένου να συγκεντρωθεί ένα ικανό ποσό για να εξυπηρετήσει τους σκοπούς μας· ταυτοχρόνως, όμως, αποτελεί και ένα σημαντικό αντικίνητρο για τη συμμετοχή στις δημοπρασίες αυτές. Γιατί να συμμετάσχει κανείς σε μια διαδικασία όπου το τίμημα είναι δεδομένο, ενώ η επιτυχία αβέβαιη; Το πρόβλημα αυτό μπορεί να λυθεί με τον εξής κανόνα: οι προσφορές όσων δεν πλειοδοτούν σε μια δημοπρασία θα προστίθενται στις ενδεχόμενες προσφορές τους στην αντίστοιχη δημοπρασία της επόμενης τετραετίας (αυξάνοντας το ύψος τους εικονικά, καθώς θα έχουν ήδη χρησιμοποιηθεί από τους προηγούμενους πλειοδότες). Ομοίως, και εκείνοι, εφόσον κάποτε πλειοδοτήσουν ως «βουλευτές» ή «περιφερειακοί σύμβουλοι», θα χρησιμοποιούν τις προσφορές όσων δεν πλειοδότησαν. Με τον τρόπο αυτό, το αντικίνητρο γίνεται κίνητρο: όσοι αποτυγχάνουν να κατακτήσουν κάποιο προνόμιο σε μια δημοπρασία, παρακινούνται να συμμετάσχουν και στην επόμενη για να μην πάνε χαμένα τα κεφάλαια που έχουν ήδη δώσει.

Ας επιστρέψουμε τώρα στη δράση της «Βουλής» και των «Περιφερειακών Συμβουλίων», αυτών των άτυπων νομοθετικών και εκτελεστικών οργάνων που αποτελούν τους κύριους φορείς υλοποίησης της πρότασής μου. Τα όργανα αυτά, όπως έχω πει, θα διαχειρίζονται όλους τους χρηματοοικονομικούς και υλικούς πόρους που συγκεντρώθηκαν στις δημοπρασίες (πράγμα που αποτελεί αναμφίβολα ένα τεράστιο προνόμιο), προκειμένου να αμβλύνουν τις οικονομικές και κοινωνικές ανισότητες. Στα πλαίσια αυτά θα μπορούν να δοκιμάζουν διάφορες αναπτυξιακές στρατηγικές και μοντέλα κράτους πρόνοιας, όπως η επιδοματική πολιτική, η προσφορά κινήτρων απασχόλησης, η επαγγελματική κατάρτιση και οτιδήποτε άλλο θελήσουν. Επιπλέον, θα μπορούσαν να ανταλλάσσουν «καλές πρακτικές» με τα αντίστοιχα «βουλευτικά» και «περιφερειακά» όργανα άλλων κρατών, να δημοσιοποιούν τα αποτελέσματα των πολιτικών τους, να συμβουλεύουν Κυβερνήσεις. Το θεάρεστο έργο τους προφανώς θα τυγχάνει απεριόριστης εκτίμησης. Οι «βουλευτές» και οι «περιφερειακοί σύμβουλοι» θα είναι οι ήρωες του σύγχρονου κόσμου -οι «Ρομπέν των αστών»- και οι μεγαλύτεροι εθνικοί ευεργέτες.

Για να είναι η δράση των οργάνων αυτών αποτελεσματική και ορθολογική, απαιτείται ένας καταμερισμός αρμοδιοτήτων μεταξύ τους, αλλά και μια δίκαιη κατανομή των χρηματικών και υλικών πόρων που θα διαχειρίζονται. Ως προς το πρώτο, τα «Περιφερειακά Συμβούλια» θα μπορούσαν να αναλάβουν την υλοποίηση κοινωφελών έργων υποδομής με έμφαση την

εξυπηρέτηση των φτωχότερων πολιτών, ενώ η «Βουλή» θα μπορούσε να προσφέρει εξατομικευμένη βοήθεια. Για παράδειγμα, θα μπορούσε να εξασφαλίσει σε όλους τους πολίτες της χώρας: α) στέγη, β) υγεία, γ) ένα ελάχιστο βασικό εισόδημα (σε χώρες που αυτό δεν είναι θεσμοθετημένο) ή την αύξησή του (σε χώρες που είναι ήδη θεσμοθετημένο), δ) βασική εκπαίδευση και ε) εργασία. Τούτο είναι απλώς μια πρόταση· η «Βουλή» θα συσκέπτεται και θα αποφασίζει κατά το δοκούν. Ο τρόπος λήψης των αποφάσεων σχετικά με τη διάθεση των κονδυλίων είναι ένα κρίσιμο ζήτημα. Οι «βουλευτές» θα μπορούσαν να αποφασίζουν διά πλειοψηφίας ή ακόμα και με σταθμισμένη ψηφοφορία βάσει του ύψους των κεφαλαίων που έχει προσφέρει ο καθένας τους στις δημοπρασίες. Τούτο όμως δεν αποκλείει να προκύψουν διαφωνίες σχετικά με τις ενδεχόμενες πολιτικές, ενώ ο κάθε «βουλευτής» θα ήθελε προφανώς τα κεφάλαια που έχει προσφέρει να διατεθούν σε σκοπούς που επιλέγει εκείνος. Θα πρότεινα, λοιπόν, το εξής: κάθε κατατεθειμένη προσφορά στις δημοπρασίες προνομίων να συνοδεύεται από τον σκοπό για τον οποίο διατίθεται. Βάσει των σκοπών αυτών, η «Βουλή» θα χωρίζεται σε αντίστοιχες επιτροπές. Θα μπορούσε, για παράδειγμα, να υπάρξει μια επιτροπή για την καταπολέμηση της ανεργίας, μια επιτροπή για εκπαιδευτικούς σκοπούς, μια επιτροπή για την αντιμετώπιση των συνεπειών και την πρόληψη της κλιματικής αλλαγής και ούτω καθεξής. Έτσι, οι αποφάσεις θα λαμβάνονται πολύ πιο στοχευμένα, με την κάθε επιτροπή να διαχειρίζεται τα κονδύλια που της αναλογούν.

Ως προς την κατανομή κονδυλίων μεταξύ των οργάνων, θα μπορούσε να γίνει η εξής διευθέτηση: κάθε «Περιφερειακό Συμβούλιο» θα διαχειρίζεται τα κεφάλαια (χρηματικά και υλικά) που συγκεντρώθηκαν από τη δημοπράτηση των εδρών του, ενώ η «Βουλή» θα διαχειρίζεται τα κεφάλαια που προέκυψαν από τις προσφορές όλων των υπόλοιπων δημοπρασιών. Τούτο είναι λογικό, καθώς η «Βουλή» αποτελεί το κύριο όργανο για την άμβλυνση των ανισοτήτων. Εκ των υστέρων, βεβαίως, θα μπορούσε να υπάρξει μια μικρή διορθωτική ανακατανομή.

Ο καταμερισμός αρμοδιοτήτων και κονδυλίων μεταξύ των «Περιφερειακών Συμβουλίων» και της «Βουλής» είναι ένα τεχνικό ζήτημα, το οποίο επιδέχεται διαφόρων διευθετήσεων. Θα μπορούσαν να βρεθούν και άλλες λύσεις πέραν αυτής που προτείνω εγώ. Προφανώς όλα τούτα πρέπει να δοκιμαστούν στην πράξη για να καταλήξουμε στους βέλτιστους κανόνες. Ας περάσουμε τώρα στην τελευταία φάση του όλου εγχειρήματος, η οποία είναι η φάση της ανατροφοδότησης. Αναφέρομαι στην ανατροφοδότηση που θα λαμβάνουν τόσο οι «βουλευτές» και οι «περιφερειακοί σύμβουλοι» για τα αποτελέσματα των πολιτικών τους, όσο και ολόκληρη η κοινωνία που θα γίνεται μάρτυρας της άμβλυνσης των ανισοτήτων της και της μεταμόρφωσής της. Η φάση της ανατροφοδότησης είναι πολύ σημαντική, διότι μπορεί να καλλιεργήσει τα ηθικά κίνητρα των ατόμων και την κοινωνική τους συνείδηση. Στα πλαίσιά της θα παρακολουθείται, θα καταγράφεται λεπτομερώς και θα δημοσιοποιείται η πρόοδος της ζωής όλων των ευεργετημένων από τη «Βουλή» και τα «Περιφερειακά Συμβούλια» πολιτών, καθώς και η πρόοδος συνολικά της χώρας σε διάφορους τομείς, όπως η ακραία φτώχεια, η ανεργία, η εκπαίδευση, η υγεία και η εγκληματικότητα. Για τον σκοπό αυτό θα μπορούσαν να θεσπιστούν ειδικά δελτία ειδήσεων, τα οποία θα μεταδίδονται καθημερινά και θα παρουσιάζουν τις εφαρμοζόμενες πολιτικές και τα αποτελέσματά τους μέσα από συνεντεύξεις, αυτοψίες και μαρτυρίες. Επιπλέον, θα ήταν πολύ σημαντικό να δημιουργηθούν δίαυλοι επικοινωνίας και προσωπικής επαφής μεταξύ των ευεργετών και των ευεργετούμενων. Η επαφή αυτή θα ενίσχυε την ηθική ικανοποίηση των πρώτων, ενώ παράλληλα θα έδινε την ευκαιρία στους δεύτερους να εκφράσουν την ευγνωμοσύνη τους. Η κοινωνία θα μπορούσε να παίξει τον δικό της ρόλο στην εμπέδωση αυτής της κουλτούρας αλληλεγγύης, στηρίζοντας με διάφορους τρόπους τους πλειοδότες των δημοπρασιών (π.χ. προτιμώντας τα προϊόντα των επιχειρήσεών τους) και αποδοκιμάζοντας όσους δεν συμμετέχουν σε αυτές (π.χ. μέσω καταναλωτικών μποϊκοτάζ). Ο τυπικός στόχος της ανατροφοδότησης είναι να μεγιστοποιήσει την αποτελεσματικότητα των εφαρμοζόμενων πολιτικών, αμβλύνοντας όσο γίνεται περισσότερο την ανισότητα· ο ουσιαστικός στόχος της, όμως, είναι η καλλιέργεια του αλτρουισμού και της κοινωνικής συνείδησης μέσα στη ζούγκλα της σύγχρονης κοινωνίας.

Αυτή είναι, λοιπόν, σε αδρές γραμμές η πρότασή μου. Η ουσία τούτης της πρότασης είναι η δημιουργία ενός διαύλου μέσω του οποίου θα συγκεντρώνονται μεγάλα χρηματικά και υλικά κεφάλαια (είτε με φιλανθρωπικά είτε με ιδιοτελή κίνητρα), τα οποία θα διατίθενται για κοινωνικούς σκοπούς. Οι σκοποί αυτοί θα ήταν πολύ πιο φιλόδοξοι από εκείνους που μπορούν να πετύχουν οι ατομικές και περιστασιακές αγαθοεργίες των πλουσίων. Αυτός, νομίζω, θα ήταν και ο κυριότερος λόγος που θα τους ωθούσε να συμμετάσχουν στις δημοπρασίες προκειμένου να γίνουν «περιφερειακοί σύμβουλοι» ή «βουλευτές»: η δυνατότητα να διαχειρίζονται μεγάλα, συλλογικά κεφάλαια για να πετύχουν ευρύτερης κλίμακας στόχους, όπως η μείωση της ανισότητας· η δυνατότητα να μεταμορφώσουν τη χώρα που ζουν ή ακόμα και τον κόσμο ολόκληρο. Τούτο θα τους προσέδιδε τεράστιο κύρος, εξουσία και κοινωνική αναγνωρισιμότητα, θα «διαφήμιζε» τις εταιρείες τους, ενώ παράλληλα η άμβλυνση των ανισοτήτων θα επιτάχυνε την εγχώρια ανάπτυξη ωφελώντας τις επιχειρηματικές τους δραστηριότητες. Τούτο το κίνητρο θα μπορούσε να δελεάσει πολλούς να συμμετάσχουν στις δημοπρασίες, προσφέροντας σημαντικά κεφάλαια (για όποιον σκοπό επιθυμούν). Φυσικά δεν είναι το μοναδικό. Πέραν των προνομίων του «περιφερειακού συμβούλου» και του «βουλευτή», τα οποία απευθύνονται προφανώς στους κρείσσους της κοινωνίας μας, ο προσεκτικός σχεδιασμός των υπολοίπων θα μπορούσε να δελεάσει πολλούς εύπορους πολίτες της χώρας. Ένας «φόρος με προνόμια»

κάνει έκκληση στη λογική και το συναίσθημα ταυτόχρονα -στον αλτρουισμό, τον πραγματισμό, τη φιλοδοξία και τη ματαιοδοξία των πολιτών- και συνεπώς η απόδοσή του θα μπορούσε να είναι σημαντική.

Ας μιλήσουμε τώρα με αριθμούς. Ποια θα μπορούσε να ήταν αυτή η απόδοση; Σε τι ύψος θα μπορούσαν να φτάσουν τα κεφάλαια που θα συγκεντρώνονταν από τις προσφορές στις δημοπρασίες; Παρακάτω δίνω ένα ενδεικτικό παράδειγμα, το οποίο αφορά στην Ευρωπαϊκή Ένωση. Οι υποθέσεις μου είναι εξαιρετικά συντηρητικές· τα προσφερθέντα κεφάλαια θα μπορούσαν να φτάσουν σε πολύ μεγαλύτερα ύψη.

Καταρχάς, ας υποθέσουμε πως στις δημοπρασίες συμμετέχουν μόνο άτομα με περιουσία άνω του ενός εκατομμυρίου ευρώ (ένα μέρος αυτών, όχι όλοι). Σύμφωνα με στοιχεία που παραθέτει ο Piketty (2014, σ. 665) -και τα οποία δεν έχουν αλλάξει δραματικά μέχρι σήμερα- τα άτομα αυτά αντιπροσώπευαν το 2,85% του ενήλικου πληθυσμού στην Ευρωπαϊκή Ένωση το 2013, ενώ η συνολική τους περιουσία έφτανε τα 32 τρισεκατομμύρια ευρώ. Αν συμμετείχε στις δημοπρασίες το 25% εξ αυτών (δηλαδή μόνο ένας στους τέσσερις Ευρωπαίους εκατομμυριούχους), προσφέροντας μόλις το 2% της περιουσίας του, θα συγκεντρώνονταν 160 δισεκατομμύρια ευρώ για μια τετραετία ή 40 δισεκατομμύρια ευρώ ετησίως. Οι εκτιμήσεις αυτές είναι εξαιρετικά μετριοπαθείς: αν, για παράδειγμα, η περιουσία κάποιου ήταν πέντε εκατομμύρια ευρώ, τότε θα πρόσφερε 100.000 ευρώ για μια τετραετία ή 25.000 ευρώ τον χρόνο. Το ποσό αυτό είναι προφανώς «ψίχουλα» για κάποιον που, βασισμένος μόνο στην απόδοση της περιουσίας του και δίχως καν να εργάζεται, έχει εισοδήματα ενός εκατομμυρίου ευρώ την τετραετία ή 250.000 ευρώ τον χρόνο (το ποσοστό απόδοσης του κεφαλαίου, όπως δείχνει το Γράφημα 3, είναι περίπου 5%). Το κεφάλαιο που θα ήταν πρόθυμος να διαθέσει ένας εκατομμυριούχος προκειμένου να γίνει «βουλευτής», λαοφιλής ή «αθάνατος» (δίνοντας το όνομά του σε μία οδό ή την όψη του σε μια προτομή) θα μπορούσε να είναι πολλαπλάσιο. Ας μείνουμε όμως στις συντηρητικές εκτιμήσεις μας, θεωρώντας πως η αξία του συγκεντρωθέντος κεφαλαίου από τις προσφορές των δημοπρασιών φτάνει τα 40 δισεκατομμύρια ευρώ ετησίως για όλη την Ευρωπαϊκή Ένωση. Αν αυτό το κεφάλαιο ρευστοποιούνταν και μετατρεπόταν σε ένα μηνιαίο επίδομα των 500 ευρώ, θα μπορούσε να βγάλει από τη φτώχεια πάνω από εξήμισι εκατομμύρια Ευρωπαίους.

Ας εξετάσουμε τώρα την περίπτωση κατά την οποία το κεφάλαιο αυτό δεν ρευστοποιούνταν, αλλά έμενε δεσμευμένο στα ταμεία της «Βουλής» και των «Περιφερειακών Συμβουλίων» (και στην κατοχή των αρχικών ιδιοκτητών), προσφέροντας μόνο την απόδοσή του στους δικαιούχους. Στην περίπτωση αυτή, οι προσφορές που θα κατατίθεντο στις δημοπρασίες θα ήταν ασφαλώς πολύ μεγαλύτερες από εκείνες του προηγούμενου παραδείγματος. Ας υποθέσουμε πως θα ήταν πενταπλάσιες, δηλαδή οι εκατομμυριούχοι θα πρόσφεραν το 10% της περιουσίας τους (αντί το 2%). Αν το ποσοστό συμμετοχής τους ήταν και πάλι 25%, τότε θα δεσμεύονταν κεφάλαια αξίας 800 δισεκατομμυρίων ευρώ. Με δεδομένη την αποδοτικότητα τους στο 5%, τα κεφάλαια αυτά θα απέφεραν και πάλι 160 δισεκατομμύρια ευρώ για όλη την τετραετία ή 40 δισεκατομμύρια ευρώ τον χρόνο. Το σενάριο αυτό, όπως και το προηγούμενο, είναι πολύ μετριοπαθές: ο κάτοχος, λόγω χάρη, μιας περιουσίας τριών εκατομμυρίων ευρώ θα πρόσφερε τις αποδόσεις του 10% της περιουσίας του για μια τετραετία, δηλαδή μόλις 15.000 ευρώ τον χρόνο, τη στιγμή που η περιουσία του αποδίδει 150.000 ευρώ ετησίως, δηλαδή το δεκαπλάσιο (δίχως καν να συνυπολογίζουμε το εισόδημα της εργασίας του). Εύκολα θα μπορούσαμε να φανταστούμε πολύ μεγαλύτερες προσφορές. Έστω, όμως, και με αυτές τις συντηρητικές προβλέψεις, το συγκεντρωθέν κεφάλαιο δεν είναι διόλου ευκαταφρόνητο.

Επιπλέον, πιστεύω ακράδαντα πως η απόδοση του «φόρου» θα αυξάνεται από τετραετία σε τετραετία. Καθώς η φάση της ανατροφοδότησης θα κάνει όλο και πιο ορατά τα αποτελέσματα της άμβλυνσης των ανισοτήτων και θα καλλιεργεί την κοινωνική συνείδηση των πολιτών, οι προσφορές τους σε κάθε γύρο δημοπρασιών θα αυξάνονται τόσο σε ύψος όσο και σε πλήθος. Το κίνητρο της συμμετοχής τους σε αυτές τις δημοπρασίες δεν θα είναι μόνο τα προσφερόμενα προνόμια, μα ολόένα και περισσότερο η κοινωνική ευθύνη, η ηθική ικανοποίηση κι ο αλτρουισμός.

Σε ποιες χώρες θα λειτουργούσε αποτελεσματικότερα ένας «φόρος με πρόνομια»; Πιθανότατα στις αναπτυσσόμενες οικονομίες, όπου οι ανισότητες είναι μεγαλύτερες (οι ΗΠΑ αποτελούν κραυγαλέα εξαίρεση). Ίσως υπάρχει και ένας επιπλέον λόγος: οι διαφορές στο ψυχολογικό προφίλ των λαών. Οι νεόπλουτοι εκατομμυριούχοι των αναπτυσσόμενων χωρών μοιάζουν να έχουν εντονότερη την ανάγκη απόκτησης κοινωνικού και συμβολικού κεφαλαίου από τους ομολόγους τους στον δυτικό κόσμο, όπως μαρτυρά η επιδεικτική τους κατανάλωση. Ως εκ τούτου, θα συμμετείχαν με μεγαλύτερη ζέση σε τούτο το σύγχρονο *Potlatch*, προκειμένου να αποκτήσουν θέσεις εξουσίας και τιμητικά σύμβολα.

Από την άλλη μεριά, βεβαίως, οι (δισ)εκατομμυριούχοι είναι πολύ περισσότεροι στις χώρες της Δύσης και συνεπώς τα κεφάλαια που θα συγκεντρώνονταν εκεί για να βοηθήσουν τους φτωχότερους πολίτες θα ήταν πολύ μεγαλύτερα. Γενικά, στις πλούσιες χώρες οι δυνητικοί συμμετέχοντες στις δημοπρασίες θα ήταν πολλοί, όμως οι χρήζοντες βοήθεια πολίτες θα

ήταν λίγοι. Στις φτωχές χώρες θα ίσχυε ακριβώς το αντίθετο. Σε ποιες κοινωνίες και υπό ποιες συνθήκες ο «φόρος» θα έφερνε τα καλύτερα αποτελέσματα;

Ο Πίνακας 1 παρουσιάζει τις οκτώ αναπτυσσόμενες και τις επτά αναπτυγμένες χώρες που θα μπορούσαν να ωφεληθούν περισσότερο. Στον πίνακα αντιπαραβάλλεται ανά χώρα αφενός ο αριθμός των δισεκατομμυριούχων (δηλαδή των ατόμων που κατέχουν περιουσία άνω του ενός δισεκατομμυρίου δολαρίων) και ο αριθμός των εκατομμυριούχων (των ατόμων με περιουσία άνω του ενός εκατομμυρίου δολαρίων) και αφετέρου ο αριθμός των ατόμων που βρίσκονται σε ακραία φτώχεια (δηλαδή όσων διαβιούν με λιγότερα από δύο δολάρια την ημέρα) και ο αριθμός των ατόμων που βρίσκονται κάτω από το όριο της φτώχειας, όπως αυτό ορίζεται από την κάθε χώρα ξεχωριστά. Εδώ δεν με ενδιαφέρει το μέγεθος της ανισότητας ή το ποσοστό των πλουσίων και των φτωχών στον πληθυσμό· εκείνο που με ενδιαφέρει είναι το πόσοι άνθρωποι θα μπορούσαν να ωφεληθούν σε κάθε χώρα από τον «φόρο με προνόμια». Και τούτο εξαρτάται από τρεις παράγοντες: τον απόλυτο αριθμό των πλουσίων, τον απόλυτο αριθμό των φτωχών και την αναλογία μεταξύ τους. Οι αναπτυσσόμενες χώρες με τον μεγαλύτερο αριθμό ακραία πλουσίων και ακραία φτωχών συνδυαστικά, καθώς και με τις πιο ισορροπημένες αναλογίες μεταξύ τους, είναι κατά σειρά οι εξής: Ινδία, Κίνα, Βραζιλία, Μεξικό, Ινδονησία, Αίγυπτος, Νότιος Αφρική και Ρωσία. Οι αντίστοιχες αναπτυγμένες χώρες είναι κατά σειρά οι εξής: ΗΠΑ, Ιαπωνία, Ιταλία, Ηνωμένο Βασίλειο, Ισπανία, Καναδάς και Αυστραλία. Οι χώρες αυτές και οι πολίτες τους θα αποκόμιζαν το μεγαλύτερο όφελος από την υιοθέτηση της πρότασής μου.

Πόσο ρεαλιστικό είναι να ελπίζουμε πως αυτή η τολμηρή πρόταση θα εφαρμοστεί; Καταρχάς, η εφαρμογή της δεν απαιτεί μια παγκόσμια συμφωνία· ο «φόρος με προνόμια» θα μπορούσε να υιοθετηθεί από όποια χώρα το επιθυμεί, έστω και ως ένα οικονομικό ή κοινωνιολογικό πείραμα. Επιπλέον, θα πρέπει να επισημανθεί πως η πρότασή μου δεν περιέχει κανένα στοιχείο υποχρεωτικότητας –δεν εξαναγκάζει κανέναν να κάνει κάτι που δεν θέλει– συνεπώς ουδείς θα είχε να χάσει κάτι από την εφαρμογή της. Αντιθέτως, πολλοί θα κέρδιζαν πολλά: οι πλούσιοι τα προνόμιά τους και οι φτωχοί μια αξιοπρεπή διαβίωση. Ένας «φόρος με προνόμια» θα μπορούσε να έχει τεράστια απόδοση. Οι πλουσιότεροι πολίτες, όπως έχω εξηγήσει, έχουν ισχυρά κίνητρα να συμμετέχουν στις δημοπρασίες, προσφέροντας τα κεφάλαιά τους προς όφελος των φτωχότερων. Ισχυρότατα κίνητρα, όμως, έχουν και τα κράτη για να τις θεσμοθετήσουν, καθώς θα ωφελούνταν πολλαπλώς. Η εξάλειψη της ακραίας φτώχειας και η άμβλυνση της ανισότητας θα είχαν μια σειρά από ευεργετικές συνέπειες στην οικονομία και την κοινωνία: θα αύξαναν την εγχώρια ζήτηση επιταχύνοντας τους ρυθμούς ανάπτυξης, θα μείωναν το υψηλό ρίσκου ιδιωτικό χρέος περιορίζοντας έτσι τις χρηματοπιστωτικές κρίσεις, θα εκτόνωναν τις κοινωνικές και πολιτικές εντάσεις και θα βελτίωναν την ποιότητα της δημοκρατίας. Τα κράτη θα πρέπει να λάβουν κάτι ακόμα υπόψη τους: την υψηλή συχνότητα εμφάνισης κρίσεων στις σύγχρονες κοινωνίες –κρίσεων οικονομικών, υγειονομικών, περιβαλλοντικών, γεωπολιτικών, μεταναστευτικών– και την ευαλωτότητα των φτωχότερων πολιτών σε αυτές. Ένας «φόρος με προνόμια» θα μπορούσε να εκτονώσει τις τρομακτικές πιέσεις που θα δεχτεί στο μέλλον το κράτος πρόνοιας εξαιτίας των κρίσεων αυτών (αλλά και εξαιτίας της δημογραφικής γήρανσης), αποτρέποντας την εκτόξευση του δημόσιου χρέους. Λαμβάνοντας υπόψη όλα τα παραπάνω οφέλη και πλεονεκτήματα της πρότασής μου και ελλείψει εναλλακτικών λύσεων για τη δραστική άμβλυνση της ανισοτήτων, μπορούμε να ελπίζουμε βάσιμα και ρεαλιστικά ότι τελικά θα εφαρμοστεί (έστω και κάπου... κάπως... κάποτε...)

Πίνακας 1: Οι χώρες με τους περισσότερους ακραία φτωχούς και ακραία πλουσίους συνδυαστικά και με τις πιο ισορροπημένες αναλογίες μεταξύ τους

Χώρες	Αριθμός δισεκατομμυριούχων (2023)	Αριθμός εκατομμυριούχων (2023) (στρουγγυλοποιημένος πλησιέστερη χιλιάδα)	Αριθμός ατόμων σε ακραία φτώχεια (> 2,15\$/ημέρα) ¹	Αριθμός ατόμων κάτω από το εθνικό όριο φτώχειας ²
Αναπτυσσόμενες				
1. Ινδία	169	796.000	138.311.205 (2019)	273.750.000 (2011)
2. Κίνα	495	6.190.000	1.407.745 (2019)	8.388.000 (2019)
3. Βραζιλία	51	266.000	12.430.921 (2021)	27.433.756 (2021)
4. Μεξικό	14	318.000	3.905.947 (2020)	55.313.254 (2020)
5. Ινδονησία	29	191.000	6.887.534 (2022)	26.172.627 (2022)
6. Αίγυπτος	6	87.000	1.584.280 (2019)	31.343.843 (2017)
7. Ν. Αφρική	5	86.000	10.200.100 (2014)	30.273.025 (2014)
8. Ρωσία	105	353.000	>100.000 (2020)	17.432.850 (2020)

Αναπτυγμένες				
1. ΗΠΑ	735	24.480.000	663.023 (2020)	50.136.765 (2021)
2. Ιαπωνία	40	3.366.000	892.115 (2013)	19.909.327 (2018)
3. Ιταλία	64	1.413.000	475.511 (2020)	11.947.209 (2020)
4. Ην. Βασίλειο	52	2.849.000	335.406 (2020)	7.513.098 (2020)
5. Ισπανία	27	1.132.000	426.291 (2020)	10.278.347 (2020)
6. Καναδάς	63	2.291.000	74.130 (2018)	3.268.617 (2020)
7. Αυστραλία	47	2.177.000	124.833 (2018)	3.232.567 (2020)

¹ Σε ισοτιμίες αγοραστικής δύναμης

² Το όριο της φτώχειας διαφέρει σε κάθε χώρα και επομένως δεν πρέπει να γίνονται συγκρίσεις ως προς τον αριθμό των φτωχών της τελευταίας στήλης

Πηγή: *World Bank, OECD, Forbes, Getulio Vargas Foundation, world population review, υπολογισμοί του συγγραφέα*

Οι χώρες που θα την εφαρμόσουν δεν χρειάζεται να ακολουθήσουν κατά γράμμα τους κανόνες και τις διαδικασίες που περιέγραψα. Πρόθεσή μου είναι απλώς να ανοίξω έναν νέο δρόμο. Είναι ο δρόμος των «φόρων με προνόμια» που ακολουθεί τα χνάρια της πανάρχαιας λεωφόρου του *Potlatch* - ένας δρόμος πλατύς μέσα στον οποίο μπορούν να κινηθούν παράλληλα πολλές ακόμα ιδέες. Ελπίζω να υπάρξουν στο μέλλον οι ιδέες αυτές για να εμπλουτίσουν και να βελτιώσουν την πρότασή μου. Οι κανόνες, οι διαδικασίες και τα προνόμια που αναφέρθηκαν είναι απλώς ενδεικτικά. Άλλωστε είναι προφανές πως τούτη η πρόταση θα πρέπει να περάσει από μια πορεία δοκιμής και σφάλματος για να πάρει την αποτελεσματικότερή της μορφή.

Η κρισιμότερη φάση αυτού του εγχειρήματος, όπως έχω ξαναπεί, είναι ο προσδιορισμός των προνομίων που θα δημοπρατηθούν. Τούτα τα προνόμια είναι που θα καθορίσουν την απόδοση του «φόρου» και το κοινωνικό όφελος που τελικά θα επιτευχθεί. Τα προνόμια πρέπει να αυξηθούν και να εκλεπτυνθούν. Προτού βασιστούμε στον αλτρουισμό και την κοινωνική συνείδηση των πολιτών -στοιχεία που θα καλλιεργήσει αργότερα η φάση της ανατροφοδότησης- θα πρέπει να σχεδιάσουμε έξυπνα εξωτερικά κίνητρα. Για να γίνει αυτό με τον καλύτερο τρόπο, κάθε χώρα θα πρέπει να συστήσει μια επιτροπή εμπειρογνομόνων, η οποία θα διερευνήσει τις ανάγκες των ατόμων που ανήκουν στα ανώτερα εισοδηματικά στρώματα. Για τον σκοπό αυτό θα μπορούσαν να επιστρατευτούν όλα τα εργαλεία της κοινωνικής έρευνας: το ερωτηματολόγιο, η συνέντευξη, το πείραμα, η παρατήρηση. Γνωρίζοντας τις πραγματικές ανάγκες αυτών των ανθρώπων, μπορούμε να σχεδιάσουμε έξυπνα και εκλεπτυσμένα προνόμια που θα τις ικανοποιήσουν. Μια δεύτερη επιτροπή θα μπορούσε να δέχεται ατομικά αιτήματα προνομίων, τα οποία θα εξαγοράζονται και θα αποδίδονται απευθείας αντί να δημοπρατούνται. Μια τρίτη επιτροπή δεοντολογίας θα εξετάζει τη συμβατότητα των προνομίων με τις δημοκρατικές και κοινωνικές μας αρχές.

Όλα τούτα ίσως ξενίζουν. Η εξαγορά προνομίων από τους πλούσιους μοιάζει να παραβιάζει την αρχή της ισότητας των πολιτών. Στην πραγματικότητα ισχύει ακριβώς το αντίθετο: η εξαγορά προνομίων οδηγεί στη μείωση της οικονομικής και κοινωνικής ανισότητας, εξασφαλίζοντας περισσότερες ευκαιρίες για τους φτωχούς. Άλλωστε οι πιο πολλοί εκατομμυριούχοι είναι άξιοι άνθρωποι που προσφέρουν πολλά στη χώρα τους (φόρους, θέσεις εργασίας κ.λπ.). Τούτα τα προνόμια θα ήταν μια ελάχιστη αναγνώριση της κοινωνίας για όσα προσφέρουν και μια συμβολική ανταμοιβή.

Για το τέλος επιφύλαξα την αυτοκριτική μου. Η πρόταση που έχω διατυπώσει έχει ορισμένα προφανή μειονεκτήματα. Καταρχάς, το κοινωνικό όφελος που θα αποφέρει δεν μπορεί να εκτιμηθεί: αφενός διότι η απόδοση του «φόρου» είναι απρόβλεπτη και αφετέρου διότι κανείς δεν ξέρει πόσο αποτελεσματικές θα είναι οι πολιτικές που θα εφαρμοστούν από τη «Βουλή» και τα «Περιφερειακά Συμβούλια». Επιπλέον, η εφαρμογή της πρότασής μου συνεπάγεται ένα (μικρό) ερευνητικό και διοικητικό κόστος -το πρώτο για την επιλογή των κατάλληλων προνομίων από τις αρμόδιες επιτροπές, το δεύτερο για τη διενέργεια των δημοπρασιών- το οποίο θα επιβαρύνει τον κρατικό προϋπολογισμό (αν και τούτο το κόστος θα μπορούσε να καλυφθεί από τις προσφορές στις δημοπρασίες). Τέλος, η πρότασή μου εγείρει προφανείς ηθικούς προβληματισμούς. Οι δημοπρασίες συμβολικών προνομίων θα δημιουργούσαν μια επίσημη αγορά κύρους, διακρίσεων και τιμών. Τούτες οι δημοπρασίες, με άλλα λόγια, μοιάζουν να εμπορευματοποιούν -και συνεπώς να ευτελίζουν- βασικές κοινωνικές αξίες και ανθρώπινα συναισθήματα, όπως η αξιοπρέπεια, η υστεροφημία και ο σεβασμός. Επιπλέον, ορισμένοι επιτήδριοι εγκληματίες θα μπορούσαν να τις εκμεταλλευτούν για να «ξεπλύνουν» μαύρο χρήμα και να αναδειχθούν ως μεγάλοι ευεργέτες στη συνείδηση των πολιτών.

Για να μετριάσω τούτες τις εύλογες ηθικές επιφυλάξεις, θα ήθελα να προτείνω εδώ κάτι τελευταίο: τα προγράμματα των πολιτικών κομμάτων θα μπορούσαν να περιέχουν τα προνόμια που προτίθενται να δημοπρατήσουν αν εκλεγούν. Έτσι, τα προτεινόμενα προνόμια θα τίθενται σε δημόσια διαβούλευση κατά την προεκλογική περίοδο και θα «νομιμοποιούνται» από την ψήφο του εκλογικού σώματος. Επιπλέον, οι συμμετέχοντες στις δημοπρασίες προνομίων θα μπορούσαν να υποβάλλονται σε φορολογικούς ελέγχους, ώστε να αποφεύγεται το «ξέπλυμα» χρήματος. Θα μπορούσαν να υπάρξουν και άλλες δικλίδες ασφαλείας. Άλλωστε, οι «εθελούσιοι φόροι με προνόμια» είναι απλώς μια αρχική ιδέα, η οποία θα μπορούσε να συμπληρωθεί από άλλους αναλυτές και να βελτιωθεί μέσα από την εφαρμογή της.

Τα μειονεκτήματά της, ωστόσο, δεν είναι αμελητέα. Προφανώς η πρόταση που έχω καταθέσει για την άμβλυνση της ανισότητας δεν είναι ιδανική. Είναι μια πρόταση που κατατίθεται εξ ανάγκης, ελλείψει εναλλακτικών λύσεων και ενόψει της καταστροφής. Η ιδανική λύση θα ήταν ένας ετήσιος, προοδευτικός και παγκόσμιος φόρος περιουσίας (ακίνητης και χρηματοοικονομικής), όπως αυτόν που προτείνει ο Piketty. Αυτός θα ήταν ο πιο αποτελεσματικός και δίκαιος τρόπος για να αναδιανεμηθεί ο πλούτος και να απενεργοποιηθεί η ωρολογιακή βόμβα της ανισότητας. Όμως τούτη είναι μια λύση ουτοπική. Δεν έχουμε την πολυτέλεια να περιμένουμε ουτοπίες. Πρέπει να δράσουμε τώρα, έστω κι αν χρειαστεί να θυσιάσουμε σε κάποιο βαθμό τη συμβατική ηθική μας χάριν της αποτελεσματικότητας και του κοινού καλού. Άλλωστε, οι ηθικοί κανόνες αλλάζουν από εποχή σε εποχή. Συμπεριφορές που θεωρούνταν ανήθικες στο παρελθόν –ο έντοκος δανεισμός, οι ασφάλειες ζωής, η αγορά δικαιωμάτων ρύπανσης του περιβάλλοντος, για να αναφέρω μόνο μερικά παραδείγματα από το πεδίο της οικονομίας- είναι αποδεκτές σήμερα. Ο σπουδαίος νομπελίστας οικονομολόγος Jean Tirole (2022, σ. 46) υποστηρίζει πως «οι οικονομικές πολιτικές δεν θα πρέπει να υπαγορεύονται από προσωπικές ηθικές παραδοχές». Κριτήριο για τον σχεδιασμό των οικονομικών πολιτικών πρέπει να είναι η κοινωνική ευημερία. Συμφωνώ απολύτως μαζί του.

Επιλογος

Η οικονομική ανισότητα έχει εκτοξευτεί τις τελευταίες δεκαετίες σε πολλές χώρες του πλανήτη. Επιπλέον, όπως έχει καταδείξει πειστικά ο Piketty, η τάση της παγκοσμίας είναι αυξητική και η δυναμική της εκρηκτική και ανεξέλεγκτη. Όλοι πλέον συμφωνούν –από τους σοσιαλιστές μέχρι και τους πλέον φιλελεύθερους- πως το πρόβλημα πρέπει να αντιμετωπιστεί.

Η άμβλυνση των οικονομικών ανισοτήτων απαιτεί έναν συνδυασμό προληπτικών και αναδιανεμητικών μέτρων. Τούτη η μελέτη επικεντρώθηκε στα δεύτερα, αποδεικνύοντας πως τόσο οι εφαρμοζόμενες όσο και οι προτεινόμενες φορολογικές πολιτικές είναι σε μεγάλο βαθμό αναποτελεσματικές. Οι τερατώδεις ανισότητες του σύγχρονου κόσμου δεν μπορούν να αντιμετωπιστούν μέσω της παραδοσιακής φορολόγησης. Αν θέλουμε να θωρακίσουμε και να εξανθρωπίσουμε το καπιταλιστικό σύστημα, θα πρέπει να επινοήσουμε νέα εργαλεία αναδιανομής του πλούτου. Ένα από αυτά θα μπορούσαν να είναι οι «εθελούσιοι φόροι με προνόμια». Η «εθελοντική φορολόγηση» θα μπορούσε να συμπληρώσει την υποχρεωτική, καθώς τα μειονεκτήματά της μίας είναι τα πλεονεκτήματά της άλλης. Αναφέρομαι σε δύο κυρίως σημεία: πρώτον, η αποτελεσματικότητα της «εθελοντικής φορολόγησης» δεν προϋποθέτει έναν παγκόσμιο φορολογικό συντονισμό. Η απόδοση ενός «εθελούσιου φόρου» σε μία χώρα δεν εξαρτάται από το τι κάνει μία άλλη, ούτε και επηρεάζεται από χώρες «αντάρτες» που δεν τον υιοθετούν. Δεύτερον, η «εθελοντική φορολόγηση» δεν στομώνει τον κινητήρα της συσσώρευσης και της ανάπτυξης, όπως κάνει η υποχρεωτική. Αντιθέτως μπορεί να τον ακονίσει: το δέλεαρ των προσφερόμενων προνομίων θα μπορούσε να ωθήσει τους πολίτες να εργαστούν και να επενδύσουν εντατικότερα, προκειμένου να συγκεντρώσουν αρκετά χρηματοοικονομικά και υλικά κεφάλαια για να τα αποκτήσουν.

Στην πραγματικότητα, η ιδέα της «εθελούσιας φορολόγησης» είναι αυτονόητη. Σήμερα υπάρχουν αρκετοί πολυεκατομμυριούχοι σε όλο τον κόσμο που κατανοούν τους κινδύνους που δημιουργεί η ακραία οικονομική ανισότητα (κίνδυνοι που απειλούν έμμεσα και τους ίδιους) και διαμαρτύρονται για τους ελάχιστους φόρους που πληρώνουν. Τι πιο λογικό, λοιπόν, από το να θεσπίσουμε έναν «εθελούσιο φόρο»; Μόνο όφελος θα προκαλούσε αυτός ο θεσμός. Η θέσπιση ενός τέτοιου «φόρου» θα αναδείκνυε περαιτέρω το πρόβλημα της ανισότητας, ενώ η τακτική πληρωμή του θα μπορούσε να γίνει μια νέα κοινωνική νόρμα. Αν, μάλιστα, τούτος ο «φόρος» συνοδευόταν και από ορισμένα προνόμια, η απόδοσή του θα αυξανόταν κατακόρυφα. Τα κίνητρα της πληρωμής ενός «εθελούσιου φόρου» θα μπορούσαν να είναι πολλά και ετερόκλητα: αλτρουιστικά, πραγματιστικά ή εγωιστικά.

Κλείνοντας, θα ήθελα να επισημάνω μια πρόσφατη και ελπιδοφόρα εξέλιξη. Στο Παγκόσμιο Οικονομικό Φόρουμ του 2023, διακόσιοι πολυεκατομμυριούχοι από όλο τον κόσμο ζήτησαν να αυξηθεί δραστικά η φορολόγησή τους, προκειμένου να καταπολεμηθούν οι τερατώδεις σύγχρονες ανισότητες. Τούτο με γεμίζει αισιοδοξία. Οι «εθελούσιοι φόροι», ακόμα και χωρίς προνόμια, θα μπορούσαν να βρουν πολλά ευήκοα ώτα.

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ΣΗΜΕΙΩΣΕΙΣ

1 Το παράδειγμα της Ιταλίας είναι ενδεικτικό: προκειμένου να αντιμετωπίσει το τεράστιο δημόσιο χρέος της, η ιταλική Κυβέρνηση θέσπισε ένα νέο περιουσιακό φόρο το 2012. Όμως ο εύλογος φόβος πως τα εγχώρια κεφάλαια θα μετανάστευαν σε ελβετικές και γαλλικές τράπεζες περιορίσε τον φορολογικό συντελεστή στο 0,8% για τα ακίνητα, στο 0,1% για τις τραπεζικές καταθέσεις, ενώ απάλλαξε πλήρως τις μετοχές. Ακόμα και τούτος ο μινιμαλιστικός φόρος αποδοκίμαστηκε έντονα από την ιταλική κοινωνία. Ο πολιτικός που τον είχε θεσπίσει ηττήθηκε κατά κράτος στις επόμενες εκλογές.

2 Ολόκληρη η επιστολή είναι διαθέσιμη στο: <https://www.ma.imperial.ac.uk/~bin06/M3A22/queen-lse.pdf>



Southeast Europe Programme

The Rise of Radical Right and Eurosceptic Political Forces and the Impact on the EU's Enlargement Policy

The Journey of Albania's Justice Reform: Progress Amidst Ongoing Implementation Challenges

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Key Developments and Challenges in 2023 – 2024**

From Migration Fears to Missed Opportunities: The Cost of Politicising EU Enlargement

**ELIAMEP Explainer:
Albania's 2025 Elections**

Europe's Overlooked Allies: Why the Western Balkans Matter for EU Defence Readiness

Enlargement on the edge: Strategic investment, credibility and resilience

The Rise of Radical Right and Eurosceptic Political Forces and the Impact on the EU's Enlargement Policy

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EXECUTIVE SUMMARY

This **think nea - New Narratives of EU Integration** report examines the growing influence of radical right and Eurosceptic political forces within the European Union (EU) and their implications for EU enlargement policy. As these parties continue to gain traction across member states, they are altering the political landscape and challenging the long-standing consensus on EU integration.

The analysis takes stock of the recent electoral victories of radical right parties, such as Georgia Meloni's Fratelli d'Italia (FdI) in Italy and Geert Wilders' Freedom Party (PVV) in the Netherlands. These electoral results reflect a broader trend of rising right wing Euroscepticism, potentially posing substantial challenges to the EU's enlargement agenda. Key drivers behind this significant shift of the political pendulum to the right include public discontent with immigration, economic disparities, and a perceived loss of national sovereignty.

The report delves deeper into how these political dynamics could shape the bloc's decision-making processes, particularly those involving candidate countries pursuing EU membership. The radical right's scepticism over further enlargement raises doubts over the feasibility of integrating countries such as Ukraine and Bosnia and Herzegovina, particularly in light of ongoing conflicts and political instability. Through a comprehensive examination of party manifestos, official statements, and expert interviews, this study identifies major patterns and trends among these parties with regard to their views on enlargement. It identifies the major enlargement-related concerns that may resonate with the public, hence influencing the EU's future trajectory.

Even though several of these parties, including VOX in Spain and the Sweden Democrats, have yet to form cohesive views on enlargement or take clearly anti- enlargement positions, the issue is likely to become more politicised in the coming years. This is largely due to its linkages with other areas of political sensitivity for these parties, including migration, fiscal policy, agricultural policy, and national sovereignty, all of which are fundamental to their agendas. Building on its findings, the report concludes that radical right parties share core thematic concerns shaping their views towards EU enlargement. These can be categorised into five main driving forces:

1. **Financial concerns:** Opposing the financial costs associated with the accession of economically less developed states is a recurring theme among these parties. For example, the PVV in the Netherlands supports a "frugal" economic position, arguing that admitting less developed countries would place undue financial strain on net-contributing member states. Similar concerns are echoed by the Rassemblement National (RN) in France RN, AfD in Germany, SD in Sweden, and FPÖ in Austria, all of which represent net contributor countries concerned over further budgetary burdens.
2. **Migration and security:** Enlargement is also closely tied to migration and freedom of movement, which are key issues for radical right parties. The RN in its discourse often associates enlargement with increased illegal immigration and organised crime, a stance aligned with its broader domestic agenda. Both the AfD and FPÖ focus on anti-migration narratives targeting Muslim populations, while the PVV places more emphasis on cultural and social risks.
3. **Foreign policy:** Relations with Russia as well as concerns about geopolitical ramifications can also be a factor influencing the positions of these parties. The AfD's longstanding tolerant -if not favourable- stance toward Russia drives its opposition to Ukraine and Moldova's accession. Conversely, Italy's FdI under Giorgia Meloni has so far adopted a pro-enlargement position, reflecting its broader pro-Western and NATO-aligned foreign policy strategy.
4. **Popular support and electoral strategy:** Public opinion and domestic political dynamics can also influence these parties' positions. In Austria and Germany, where public scepticism towards enlargement is significant, the FPÖ and AfD have aimed to capitalise on these sentiments to gain electoral support. Additionally, these two parties have sought to appeal to specific demographics, formulating narratives that resonate with their target voter bases.
5. **Concerns over EU functionality and sovereignty:** Finally, radical right parties often link enlargement to broader discussions about EU governance. They claim that incorporating new members would necessitate institutional reforms, such as a shift to Qualified Majority Voting (QMV) in areas such as foreign policy and tax policy, which they perceive as undermining national sovereignty. This could signal a departure from traditional anti-federalist methods that favoured enlargement as a counterbalance to deeper EU integration. Even though a shift to QMV could streamline decision-making, it might also exacerbate tensions among member states, providing fertile ground for radical right parties to amplify their Eurosceptic discourse.

The EU needs to navigate these complexities carefully, balancing the challenges posed by radical right parties with its broader goals of unity and expansion. The growing influence of these parties introduces complexities into the EU's decision-making processes. On the one hand, their scepticism can slow down or derail enlargement policy, particularly concerning Ukraine and the Western Balkans. On the other hand, their focus on sovereignty and national identity raises questions about the EU's integration model, potentially leading to alternative frameworks such as "multi-speed Europe" or associate memberships.

It is important, however, to mention that the dividing lines between support and opposition to enlargement among radical right parties are far from uniform. For example, Italy's FdI has adopted a pragmatic, pro-enlargement stance emphasising economic and strategic benefits, while parties such as the Netherlands' PVV and Austria's FPÖ maintain staunch opposition. Hence, a much more nuanced picture emerges from the findings, where radical right parties can be categorised as "supportive", like the FdI, "ambiguous", like VOX, and "against", like the AfD, when it comes to their EU enlargement position.

Overall, this report intends to serve as a resource for understanding the intersection of radical right-wing political forces and the EU's enlargement policy, offering valuable insights for policymakers involved in shaping the future of the EU in the coming years.

Setting the stage

The rise of Eurosceptic radical right forces across the EU

This report takes stock of the growing influence of radical right and Eurosceptic political forces within the European Union (EU) and examines the implications for EU enlargement policy. By shedding light on the developments in a number of key EU member states the report aims to map the challenges that these dynamics are likely to pose for the rejuvenated momentum on EU enlargement and the prospects of an enlarged Europe.

In recent years, the political landscape of Europe has witnessed a notable surge in radical right Eurosceptic forces. For example, in November 2022, Meloni's radical right party, Fratelli d'Italia, and her right-wing coalition with fellow anti-immigration right-wing party Lega and centre-right Forza Italia, won nearly 44% of the vote. With Fratelli d'Italia having won up to 26% of the vote, its leader Georgia Meloni became the head of the coalition, promising to take a tougher bargaining stance with Brussels, to include the review and renegotiation of Italy's National Recovery and Resilience Plan (NRRP). This was the first time that a party affiliated with the European Conservatives and Reformists (ECR) group in the European Parliament had taken charge of the Italian government; for Salvini's Lega, which is affiliated with the far-right Patriots for Europe (PfE), this was its second time as a junior partner in a government coalition.

In November 2023, Eurosceptic populist leader Geert Wilders achieved a significant victory in the Dutch general election. After 25 years in the Dutch parliament, his Freedom Party (PVV), currently a member of the PfE group in the European Parliament, secured 37 seats, outperforming the Green-Left coalition led by former Vice-President of the European Commission Frans Timmermans, which obtained 25 seats. The ruling conservative VVD and the newly established centrist New Social Contract (NSC) followed with 24 and 20 seats respectively. Following the announcement, Wilders proclaimed that "the PVV can no longer be ignored" and expressed his intention to govern. Wilders, known for his far-right ideology and opposition to Islam, has previously advocated for the Netherlands' withdrawal from the EU and cessation of support for Ukraine. After six months of negotiations, Wilders managed to form a coalition by abandoning his bid to become prime minister in March and agreeing to moderate some of his more extreme policies, such as banning the Quran and mosques. As a result, he saw his party entering the government for the first time in its history.

In addition to these cases, there are other countries where such parties have become increasingly prominent, including Sweden, Finland, Czechia and most recently Portugal, where the populist anti-establishment Chega ("Enough") party became in March 2024 the third largest in the country under the leadership of the former television sports commentator Andre Ventura. Ventura has garnered support from other prominent far-right figures in Europe, including Italian Deputy Prime Minister Matteo Salvini and Geert Wilders. In Austria, as things currently stand, the Freedom Party of Austria (FPÖ) is likely to lead the next government following September's parliamentary elections.

These electoral results indicate a broader trend across the continent, where radical right parties are gaining ground by capitalising on rising dissatisfaction with the political establishment, frustration over the rising cost of living, and growing anti-migration sentiment. To a great extent, this was also reflected in the European elections of 9 June 2024, where populist right-wing and far-right forces made significant gains.

At first glance, the European elections did not significantly shift the balance of power within the European Parliament, as centrist pro-EU parties (European People’s Party - EPP, Socialists & Democrats - S&D, and Renew Europe) maintained their majority with 401 seats, which is enough to advance policies without needing support from parties to their right.

However, the election results have notably impacted national political landscapes across several EU countries more than they have the European Parliament itself. For instance, in France, President Emmanuel Macron's decision to call a snap election in June was a direct consequence of the EU elections, in which his coalition performed poorly, polling far fewer votes than the Rassemblement National (RN). The RN was ultimately outpaced in the second round on 7 July, after the left-wing bloc and Macron’s alliance agreed to withdraw more than 200 of their candidates to avoid splitting the vote and decreasing the likelihood of the Far Right taking power. Nevertheless, the RN led the first round with 34% of the vote, nearly doubling its 18% first-round performance from 2022.

A major development in the new European Parliament is the formation of the new far-right Patriots for Europe PfE group and of the Europe of Sovereign Nations (ESN) group. Including former members of the Identity & Democracy (ID) group and the Hungarian Fidesz party led by Viktor Orbán, the PfE became the third- largest group in the European Parliament with 84 MEPs. Furthermore, the right- wing soft Eurosceptic ECR also overtook the centrist Renew Europe group, which dropped to fifth place from third. In the previous European Parliament, the two Eurosceptic right-wing parliamentary groups held a total of 118 seats; however, in the new Parliament, there are three such parliamentary groups with a combined total of 188 seats, which is just one seat short of the EPP group.

The current seat distribution is as follows:

Name of political party in European Parliament	Number of seats
European People's Party – EPP	188
Progressive Alliance of Socialists and Democrats – S&D	136
Patriots for Europe — PfE	84
European Conservatives and Reformists – ECR	78
Renew Europe	77
Group of Greens	53
The Left Group in the European Parliament – GUE/NGL	46
Europe of Sovereign Nations – ESN	25
Non-attached members	33

Defining the radical right and Eurosceptic challenge

Before delving deeper into these cases, it is important to clarify the definitions of political parties that position themselves to the right of the mainstream centre-right on the political spectrum. These parties are often labelled with a variety of terms in the media, including 'hard-right,' 'radical right,' 'far-right,' 'nativist right,' 'extreme right,' and 'populist right'. These labels are frequently used interchangeably, which can lead to confusion. However, according to the scholarly literature, a distinction can be made between 'radical right' and 'extreme right' parties.¹

Extreme right parties are characterised by their fundamentally illiberal and undemocratic nature and often reject core democratic principles. Radical right parties, on the other hand, while illiberal, operate within democratic frameworks. Their illiberalism manifests itself primarily in a nativist agenda, which is defined as the belief that states should be inhabited exclusively by members of the 'native group,' and that 'non-native' elements threaten the homogeneity of the nation-state. Despite variations in focus, whether this be opposition to the Green agenda, resistance to "woke" policies, or something else, one key feature which unites the parties examined in this study is a shared hostility towards immigration. This hostility is driven by an exclusionary logic whereby "other" groups are perceived as a threat to the cultural and ethnic homogeneity of the nation-state.² It is important to bear in mind that their level of radicalism can vary: for example, Italy's Fratelli d'Italia (FdI), the only party in this study currently in charge of a governmental coalition, has espoused a more pragmatic approach to migration compared to the agenda of parties such as the German Alternative für Deutschland (AfD) party, which has gone so far as to suggest deporting migrants.³

A further distinction can be drawn depending on the degree of Euroscepticism of the radical right parties in our study, with both "soft Eurosceptic" and "hard Eurosceptic" parties represented. At a European Parliament level, the former are affiliated with the ECR group, while the latter are mainly part of the PEF group, which was founded in July 2024, in part as the successor of the "Identity & Democracy" group (ID). Hard euro-sceptic parties are also found in the "Europe of Sovereign Nations" (ESN) group, another recent formation, this time led by the AfD.

EU enlargement process at a crossroads

More than two decades after the European Council and EU-Western Balkans Summit held in Thessaloniki in 2003, where the EU formally committed to the integration of the Western Balkans and offered them a clear pathway to membership, the EU enlargement process finds itself at a crossroads.

Prior to 2022, there was a prevailing sense of enlargement fatigue due to prolonged negotiations, bilateral disputes, and a perceived lack of progress. However, Russia's invasion of Ukraine has given the process a renewed political momentum, prompting stronger political support from EU member states and ultimately leading to the opening of accession talks with Ukraine and Moldova and to Georgia receiving candidate status.⁴ Subsequently, in March 2024, the European Council gave its green light for the opening of talks with Bosnia & Herzegovina, following the Commission's positive recommendation and despite not all member states being convinced the country fulfilled all 14 of the key priorities outlined by Brussels in 2019.⁵

A study conducted by the European Council on Foreign Relations (ECFR) noted that since February 2022, public support for EU enlargement has risen in almost every member state.⁶ This is also mirrored in the statements of senior political leaders, including French President Emmanuel Macron who recently abandoned his earlier reluctant stance, stating that the EU should admit new countries "*as swiftly as possible*". And while Russia's invasion of Ukraine reinvigorated the enlargement process in general, it also shifted the focus eastwards and seemingly away from the Western Balkans.⁷

In September 2023, a group of 12 experts from France and Germany published a report commissioned by the German and French governments detailing the reforms that were necessary for the EU to accommodate more member states.⁸

These proposals include:

- Shifting from unanimity to Qualified Majority Voting (QMV) in areas including foreign policy and tax policy, so as to streamline decision-making.
- Adjusting voting weights within QMV in the Council to reflect the demographic and economic realities of an enlarged EU.
- Allowing for more flexible cooperation among member states with different levels of integration readiness, including the introduction of an associate membership status.
- Increasing the EU budget to address the challenges of a larger Union, potentially reforming the Multiannual Financial Framework (MFF) to ensure adequate financial resources for candidate states.
- Substantially reforming the Common Agricultural Policy (CAP), especially to accommodate Ukraine.

The above proposals suggest that there is a link between the EU's widening (enlargement) and its deepening. In particular, moves for a potential shift towards QMV in the Council in politically sensitive areas such as foreign policy and enlargement policy has been gaining momentum in certain European capitals, especially in Western Europe. Indicative is the launch of the so-called "inclusive Group of Friends to foster QMV in the EU's Common Foreign and Security Policy (CFSP)", a German-led initiative joined by France, Belgium, Finland, Italy, Luxembourg, the Netherlands, Slovenia, Spain, Romania with the dedicated objective "to improve [the] effectiveness and speed of our foreign- policy decision-making against the backdrop of Russia's war of aggression against Ukraine and the growing international challenges the EU is facing".⁹ This push for QMV has largely been driven by repeated (temporary) Hungarian vetoes on EU military and financial aid to Ukraine and on proposed sanction packages against Russia, which Budapest has often lifted in exchange for concessions.

Why is the study important?

The intersection between the rise of these radical right Eurosceptic forces and the EU enlargement process is of particular relevance following the European elections, and still more importantly in light of upcoming national elections that could see the "balance of power" in the EU institutions shift further to the right. While much attention has been paid to these parties' potential impact on issues like migration and foreign policy, or even their potential reversal of Green Deal policies, **their stance on EU enlargement remains underexplored**. Understanding their positions on enlargement is crucial, as they could potentially challenge the prevailing status quo and have far-reaching implications for the future trajectory of European integration.

Ultimately, **the EU's readiness for enlargement increasingly hinges not on objective criteria and alignment with the EU acquis, but on member states' ability to reach a political consensus regarding the timing and conditions of enlargement**. In other words, political will ultimately outweighs technical or legal aspects. In addition, public support for enlargement in EU member states is another key factor: certain national governments could potentially hold referenda to allow their citizens to decide on whether to accept new members, particularly if enlargement was combined with internal reforms and the further transferral of powers to Brussels.

Thus, evaluating the EU's political readiness for enlargement and navigating the ensuing challenges requires an in-depth multileveled understanding which takes stock of the emerging political dynamics not only in candidate states themselves (first level), but also in key member states (second level), in conjunction with the impact of global events and the geopolitical environment (third level).

Therefore, by primarily focusing on the second level, this study aims to:

- Understand the interest in, and potential impact of, right-wing Eurosceptic political parties on enlargement policy;
- Explore the avenues and trade-offs they will accept in exchange for their providing support for enlargement;

To that end, the study seeks to delve into the following key areas:

The positions radical right Eurosceptic forces take on enlargement:

- By investigating the views these parties/groups have articulated on EU enlargement in selected member states;
- By analysing whether their stance aligns with traditional longstanding national positions on enlargement, particularly in countries like Germany and Austria, which are known for their historical support for enlargement, or France and Netherlands, which are known for their scepticism vis-à-vis enlargement;
- By assessing whether these parties' positions on EU enlargement have also witnessed a shift since February 2022.

The implications for the enlargement process of the rise of radical right Eurosceptic forces:

- By assessing the extent to which these parties challenge or reinforce the existing enlargement agenda, both at the national and EU level;
- By examining whether these parties converge or diverge in terms of their stance on enlargement;
- By exploring potential differentiations among their positions and/or preferences vis-a-vis the Western Balkans compared to Ukraine and Moldova;
- By examining what type of enlargement, they support or envision (e.g. gradual/staged accession etc.);
- By examining their key concerns and the reasoning underlying their positions on EU enlargement;
- By exploring their position on the potential introduction of QMV in the EU's CFSP and whether it relates to their stance on enlargement

Which countries and political parties?

The study investigates selected member states and parties (in parenthesis their European Parliament party affiliation):

- Germany - Alternative für Deutschland/Alternative for Germany, AfD (ESN)
- France - Rassemblement National/National Rally, RN (PfE)
- Italy - Fratelli d'Italia/Brothers of Italy, FdI (ECR)
- Spain - VOX/Voice (PfE)
- Netherlands - Partij voor de Vrijheid/Party for Freedom, PVV (PfE)
- Sweden - Sverigedemokraterna/Sweden Democrats, SD (ECR)
- Austria - Freiheitliche Partei Österreichs/Freedom Party of Austria, FPÖ (PfE)

These countries represent a diverse array of the political landscapes in which radical right Eurosceptic forces are gaining prominence and could potentially influence governing coalitions. In certain member states, they are already part of ruling coalitions or even in charge of them (Italy, and possibly Austria soon). In Germany and France, which will play a pivotal role in shaping the enlargement process as two of the most influential EU member states, shifts further to the right are also clearly observable in the political landscape.

It is important at this point to distinguish between those national radical right-wing parties affiliated with the ECR group in the European Parliament and those that are affiliated with the PfE and ESN. The former is considered a "soft Eurosceptic" anti-federalist group which mainly advocates against overregulation, supports the bloc's current intergovernmentalist model, and has both centre-right and far-right factions. The latter two are hard Eurosceptic groups, though there are certain policy overlaps and alignments between national parties belonging to the ECR and the PfE in certain areas. Certain members of the ECR adopt a more hardline stance vis-a-vis Brussels, for instance, while certain parties in the PfE, including Le Pen's RN, are appearing increasingly pragmatic by toning down their anti-EU rhetoric.

Overall, the soft Eurosceptic parties tend to resist further integration but are not against the EU, while the hard Eurosceptic parties usually reject the entire project, calling for an exit from the Union or a shift to a loose alliance of European states.¹⁰

Methodology and sources

The research methodology employed a multifaceted approach, including:

- a. The analysis of party manifestos, official statements, and policy documents available on party websites;
- b. The examination of key statements made by leading party figures and senior officials;
- c. Conducting interviews with experts from think tanks and academic institutions in the member states under study to gain nuanced insights into the underlying dynamics shaping the positions of these parties on EU enlargement;
- d. Brainstorming sessions with renowned experts;
- e. Mapping and analysing voting patterns in the European Parliament's votes on the Commission's annual enlargement reports (2019-2024)

The decision to focus on select countries enhances both the feasibility and depth of the study. By narrowing the scope, the research delves into more detailed analyses of the political landscapes, party dynamics, and specific policy positions within each country chosen, allowing for the formulation of more targeted and specific recommendations.

Examining the influence in select member states

Germany's Alternative for Germany: rising electoral force with a hardline stance on enlargement

Country background

Germany has long been a steadfast advocate of EU enlargement albeit with significant emphasis on conditionality.¹¹ After the end of the Cold War, it actively pushed for the accession of several Eastern European countries. This has also been the case with the Western Balkans over the past two decades. Indicatively, the Berlin Process is a key German-led initiative aimed at fostering regional cooperation and development in the Western Balkans, which was initiated by then-German Chancellor Angela Merkel in 2014, when the enlargement process had started to lose steam.

Germany has also stressed the importance of the EU maintaining its credibility by keeping its enlargement promises, especially in the light of previous delays and setbacks in the Western Balkans. Consequently, it has pressed for the commencement of accession talks with North Macedonia and Albania, and ensured that countries like Serbia align with EU foreign policy standards, particularly with regard to sanctions against Russia.¹² Germany has also been proactive in addressing specific regional issues, such as facilitating the Belgrade-Pristina dialogue and supporting Bosnia and Herzegovina through participation in the EUFOR Althea mission.

The "traffic lights" coalition government (2021-2024) in Germany led by SPD leader Olaf Scholz was among the most vocal supporters of granting candidate status to Ukraine and Moldova following Russia's invasion of Ukraine. However, Germany's approach has shifted over the years from merely advocating for enlargement to linking it to broader EU reforms. In particular, the current German government insists that enlargement must be accompanied by internal EU reforms to streamline decision-making, including the extension of QMV to areas like foreign policy and taxation.

Interestingly, the longstanding position of consecutive German governments in support of EU enlargement has not necessarily been aligned with public sentiment in the country. Even though there is some recognition of the strategic benefits of integrating the Western Balkan countries, public opinion remains divided on the matter, and support is stronger for the candidacy of Ukraine and Moldova than it is for the Western Balkans. According to a Eurobarometer survey conducted between May and June 2023, overall only 42% of Germans backed the integration of new member states, putting Germany third from the bottom when it comes to public support for enlargement, behind Austria (29%) and France (35%).¹³ An EU-wide ECFR survey published in November 2023 revealed that the potential consequences for the EU budget were among the main concerns cited in relation to EU enlargement, especially given Germany's status as the main net contributor.¹⁴

Overall, Germany's EU enlargement policy has evolved from all-embracing support to a more nuanced approach that links enlargement to critical and much-debated institutional reforms within the EU.

Alternative für Deutschland/Alternative for Germany (AfD)

Founded in 2013, the AfD initially focused on economic liberalism and opposition to EU bailouts for indebted Eurozone countries. However, the party has since evolved into a radical right-wing force focused on Islam and migration and, in recent years, consistently advocating for Germany's exit from the Eurozone and, at times—during the German 2021 general elections, for instance—the EU. Although the 2023 party congress did not explicitly call for either a German exit or the dissolution of the EU, the AfD remains among the most Eurosceptic/anti-EU parties in our study. Its latest EU election manifesto, adopted in August 2023, deemed the EU a “failed project” and called for its re-establishment as a “Confederation of European Nations”.¹⁵

In January 2024, the AfD's co-leader Alice Weidel pledged to hold a “Brexit-style” referendum on EU membership, should they win the next general federal elections, which are now scheduled to take place on 23 February 2025.¹⁶ A significant aspect of the AfD's foreign policy is its stance towards Russia, which contrasts sharply with Germany's traditional alignment with NATO and the EU. The AfD has advocated for closer ties with Russia, viewing it as a strategic counterbalance to the EU and the US. This position includes opposition to sanctions against Russia and support for policies that align more closely with Russian geopolitical interests.

The AfD's pro-Russia inclinations are also reflected in its stance on Ukraine. Since Russia's invasion of Ukraine, the AfD has continued to call for sanctions to be lifted and voiced criticism of Germany's support for Ukraine. Party leaders have travelled to Russia and Russian-occupied territories, signalling a willingness to engage with Russia despite the ongoing conflict.¹⁷ In November 2023, the AfD also expressed strong reservations ahead of the EU's decision to start accession talks with Ukraine and Moldova. Party leaders have cited significant deficiencies in these countries' legal systems and governance, as well as ongoing conflicts, as major obstacles.¹⁸ They argue that admitting Ukraine, especially during its conflict with Russia, could draw the EU into further geopolitical tensions and military obligations.

Overall, the AfD position on EU enlargement is marked by firm opposition, and this stance has remained unchanged over the years, including with the recent opening of accession negotiations with Ukraine and Moldova. In 2018, AfD MP Siegbert Droege demanded a referendum on the accession of Western Balkan countries, citing fears of “Balkanisation” due to corruption and organised crime in the region.¹⁹ More importantly, in its latest EU election programme/manifesto, the AfD warns against “*the surrender of sovereign rights and liability commitments without a referendum*”, reiterating its position in support of a nationwide vote on key areas pertaining to EU integration, such as the monetary union and Germany's own EU membership.²⁰

Bernhard Zimniok, a former AfD MEP, the party's foreign policy spokesman and a member of its Foreign Affairs committee between 2019-2024, has been particularly vocal in his opposition to EU enlargement. In October 2019, he opposed the opening of accession talks with Albania and North Macedonia, arguing that introducing two net recipient states would burden the fragile EU and calling it “*a fatal mistake*”.²¹ In 2021, he reiterated this stance, criticising the Rule of Law in the Western Balkan countries and pointing out that “*despite all the EU money that is used to guarantee the Rule of Law, there is little or no Rule of Law at all in these countries*”. He also highlighted security concerns related to illegal immigration and weapons trafficking from the region.²² In May 2023, Zimniok again criticised the EU for offering accession prospects to Serbia and Kosovo, highlighting the prevalence of organised crime in Kosovo, arguing that admitting these countries would not only import their conflicts into the EU but would also be financially burdensome for Germany, as these countries would be net recipients.²³

In December 2022, the AfD submitted a detailed proposal to the Bundestag, warning that EU enlargement could bring terrorism and organised crime to Germany. This document portrayed enlargement as a threat, specifically citing ISIS fighters from North Macedonia, Bosnia and Herzegovina, and Kosovo. Additionally, they highlighted concerns about drug cartels, pointing to Albanian criminals in particular. The AfD also emphasised the high unemployment rates in Kosovo, especially among youth, which could potentially lead to poverty-driven migration to Germany. They argued that maintaining visa requirements for Western Balkan countries, to prevent such migration, is in Germany's national interest.²⁴

A large portion of the policies advocated by AfD politicians is driven by their need to increase their electability by seeking “*a narrative that will attract more votes for them*” and focusing on topics that resonate with potential voters.²⁵ EU enlargement is no exception, with the AfD explicitly or indirectly linking several of these topics with potential EU enlargement. Domestically, the AfD's hardline stance on EU enlargement resonates with its voter base, which is often sceptical of the EU and concerned with migration and economic instability. The AfD's strategy involves adopting more

mainstream language and references to attract a broader audience, while maintaining an anti-EU and anti-immigration core. The AfD exploits high levels of anti-immigrant sentiment stemming from demographic changes and economic concerns in order to attract voters from other parties, especially the centre-right conservative Christian Democratic Union (CDU), by appealing to those who feel neglected, and particularly young men in Eastern Germany where a sense of being second-class citizens and resentment towards foreigners are prevalent.²⁶

In a similar manner, their stance opposing sanctions on Russia and the provision of political and material support to Ukraine, can also be seen as an attempt to appeal to the significant pro-Russian segment within their voter base, including many ethnic Germans recently repatriated from the former Soviet Union and Eastern Germans who do not view Russia as a threat.²⁷ Indeed, Saxony, in Eastern Germany, appears to be at the epicentre of the AfD's strategy. A poll conducted only a few months after the Russian invasion of Ukraine in 2022 indicated that 68% of people in the state had not changed their opinion of the Russian population since the invasion. Additionally, nearly 40% of respondents reported that their views on Vladimir Putin remained the same. Overall, the survey suggested that people in Eastern Germany are 13 percentage points less likely than those in the West to perceive Putin's Russia as a threat to their country.

Notably, the AfD has repeatedly argued that the multicultural model supported by the EU has failed in the Balkans, criticising "*the forces centralization in Bosnia and Herzegovina, the enforcement of Bosniak interests while ignoring the rights of Croats and Serbs in Bosnia-Herzegovina*". The AfD supports the formation of a separate Croatian entity similar to the Republika Srpska for the Serbs. As with their strategy of courting Russian-Germans, this stance is intended to appeal to Serbian and Croatian voters in Germany.²⁸

Despite past instances of antisemitism within its ranks, the AfD portrays itself as a strong ally of Israel.²⁹ While surprising at first glance, given the history of the German Far Right, this strategy is driven by its goal of attracting the votes of Jews who emigrated from the former Soviet Union, including those who could feel threatened by Muslim immigration.³⁰

What is particularly noteworthy is that the AfD has recently reverted to the use of a more "mainstream" political language intended to appeal to a broader audience, while maintaining its core anti-EU and anti-immigrant stance.³¹ For example, it refers to "privileged partnership" instead of full membership for the Western Balkan candidate states, a term originally used by Helmut Kohl with regard to . This strategy is also aimed at attracting CDU voters who are discontented with the party's current policies.

In summary, the AfD's opposition to EU enlargement is part of a broader strategy designed to attract votes through a combination of nationalism, anti-immigration rhetoric, and scepticism towards EU integration.

France's National Rally: open opposition to enlargement wrapped in pragmatic Euroscepticism

Country background

Since the discussions around EU enlargement began to include the Western Balkans in 2003, France's stance has switched between periods of caution and active engagement. Traditionally, France has been cautious about further EU enlargement, emphasising the need to deepen the EU's internal structure and governance before widening its membership. This cautious approach was rooted in concerns about the balance between the EU's internal market and welfare system, as well as the efficiency of EU decision-making processes with an increased number of member states.³²

France's scepticism has been evident in its policy decisions, which have included the introduction of a referendum requirement for all new accessions after Croatia in 2013, and its controversial blocking on starting accession talks with Albania and North Macedonia in 2019, citing the need for internal EU reforms.³³ This decision highlighted a significant politicisation of the EU enlargement debate within France, marking a departure from previous indifference towards the region in French internal politics. French politicians, particularly from President Macron's party, have been cautious in their stance on enlargement, fearing that overt support might erode their domestic popularity.³⁴ According to a report published in February 2021 which analysed French public opinion on EU enlargement, nearly 58% of French citizens opposed the idea, echoing similar sentiments held by the Austrian and German public. However, unlike the French government, the governments of Germany and Austria have been consistent in their support of EU enlargement.³⁵

The geopolitical landscape shifted significantly following Russia's full-scale invasion of Ukraine in February 2022. This event served as a wake-up call for the EU, leading to a re-evaluation of the strategic importance of enlargement. Notably,

France and its President Emmanuel Macron began to adopt a more favourable stance towards EU enlargement, recognising the geopolitical necessity of nations including Ukraine, Moldova, and the Western Balkan countries being members of the EU. Macron's visit to Ukraine in June 2022 and his subsequent call for Kyiv's future EU accession marked a significant shift in France's position away from caution towards active support for the process. This change was further evidenced by Macron's statements at GLOBSEC in Bratislava in May 2023, in which he highlighted the importance of EU enlargement to meet the expectations of Moldova, Ukraine and the nations of the Western Balkans.³⁶ President Macron has therefore remained supportive of the accession of Ukraine and Moldova in the context of Russian revisionism in eastern Europe. However, he has also stated that this could be a lengthy process, warning in December 2023 that Ukraine's accession was still a long "way off" in response to a question about its potential impact on the French agricultural sector.³⁷

Despite this shift, France continues to stress the need for internal EU reforms, particularly in areas such as the introduction of QMV for foreign policy and taxation issues, to avoid a more expanded but dysfunctional decision-making in the EU.³⁸ At the same time, France has not positioned itself on QMV on the intermediary steps of the enlargement process, a move that is thought would expedite applicant countries accession.³⁹ This position demonstrates a certain degree of continuity in France's approach, which has long sought to balance the need for enlargement with the necessity of internal structural reforms.⁴⁰ Nevertheless, France overall finds itself in the enlargement sceptics' camp. Most recently, it has often been difficult to distinguish between the mainstream right-wing, the French National Rally (RN), and Reconquête, its far-right rival on their positions regarding enlargement. Common themes of anti-enlargement discourse on the French political scene include linking enlargement with migration, employment issues for the French, and identity. Certain elements of the Macronian centre have also publicly voiced their scepticism towards EU enlargement.⁴¹

As analysed in the next section, these themes are particularly dominant in the enlargement discourse of the RN.

Rassemblement National/National Rally (RN)

The policy of the National Rally towards the EU has undergone significant changes over the years. Initially, the party originally known as the National Front, under the leadership of the late Jean-Marie Le Pen and then his daughter Marine Le Pen, was known for its strong xenophobic, nationalist, anti-immigration stance, advocating for significant cuts to legal immigration, stricter control of illegal immigration, and a more "independent" French foreign policy. It was also an advocate of an EU exit ("Frexit").

However, Marine Le Pen's leadership marked a strategic shift for the party, as she has recently sought to distance it from its far-right roots and its past under her father's leadership. In recent years, particularly since the National Front rebranded itself as the National Rally in 2018, the party has moderated its stance on the EU. No longer advocating for France's exit from the EU, the party now campaigns for EU reform and supports keeping the euro as the country's currency. In 2021, Le Pen expressed a desire for France to remain in the Schengen Area, but proposed restricting free movement to nationals of countries within the European Economic Area (EEA), excluding residents and visitors from another Schengen country.

This evolving stance has largely been interpreted as an attempt to appeal to a broader segment of the French electorate and increase the prospects of the party achieving electoral successes at both national and European levels. Thus, while its European programme called in 2019 for the European Commission to be abolished, the most recent version (from February 2024) has watered down its criticism of the EU, indicating a more pragmatic stance.⁴² Rather than a potential "Frexit", RN now advocates for a more intergovernmental approach shaped by a "European alliance of nations", a vision shared by parties that have joined Victor Orbán's Fidesz in the recently-formed "Patriots for Europe" group in the European Parliament.⁴³ RN envisions an "à la carte" Europe in which several competencies are brought back to the national level while EU policies that serve what they perceive to be French interests are retained.⁴⁴

The party has demonstrated greater consistency in its hardline scepticism vis-à-vis further enlargement in both the case of the Western Balkans and the most recent candidate states, Ukraine and Moldova. Despite presenting itself as a more moderate political force to gain broader support, and softening its rhetoric on the EU, its MEPs have consistently voted

against all enlargement-related resolutions in the European Parliament in the previous mandate (2019-2024). In May 2020, Marine Le Pen publicly lambasted President Macron for his decision to lift France's previous veto on the beginning of accession talks with Albania and North Macedonia, accusing him of "secretly pushing through a decision rejected by a majority of French people".⁴⁵ Reacting to the announcement of the opening of accession talks with the two Western Balkan countries in 2022, Jordan Bardella, an MEP and the current President of the RN, described "*perpetual enlargement as a horizon without any political or economic logic*", potentially "*condemning the EU to impotence*".⁴⁶

More specifically, Bardella pointed to the huge financial disparities between the candidate states and the majority of EU member states, including France. However, in addition to economic concerns, Bardella explicitly cited cultural and religious grounds for his party's opposition to the accession talks. With regard to Albania, he argued that both the EU and France "*are already facing the challenge of preserving their identity*", expressing concerns about the implications of integrating a country with a Muslim majority, while also calling the country "*a gateway to illegal immigration into Europe*". Another area to which he drew attention was the Rule of Law. He argued that Albania is a "real narco- state", dominated by corruption and ruled by mafias, warning that these phenomena could spill over into Europe. Of particular interest was the fact that his alarmist rhetoric did not only focus on the alleged negative implications of EU enlargement for France, but extended to the entire bloc, and that he called for any further expansion to be refused "*in accordance with the will and interests of the European peoples*".⁴⁷

Speaking earlier in 2024, Bardella also called EU enlargement one of the pillars of "Vonderleyism", a neologism coined from the name of the current President of the Commission to refer to factors that could lead to the "suicide of Europe": the migration pact, the Green Deal, and steps towards weakening the sovereignty of member states.⁴⁸

With regards to Ukraine and Moldova, RN has maintained a similar stance. In November 2023, reacting to the prospects of granting these two countries candidacy status, RN MEP Thierry Mariani cited the historical experience of the 2004 and 2007 accessions, which saw ten then two countries join the bloc, to express his party's opposition to further enlargement. Mariani called the precedent represented by these accessions "*not just a disappointment, but the accelerator of an exit from history*". Like his party's leader, the MEP emphasised the risks of increasing economic and social dumping, stating that "*the integration of the Balkan countries into the EU means ever more mafia in the French countryside*", whereas Ukraine's accession would mean "*importing war into the Union*".⁴⁹

Another interesting argument evoked by the parliamentarian in his plenary speech was the potential institutional implications of further enlargement, as he warned that that it could lead to a shift from unanimity to QMV in the decision-making process of the EU Council in key areas. However, Mariani cited national interest grounds to make his case, arguing that such a reform would make France "*dependent on the decisions of states which have delegated their independence to NATO*", which could potentially place the country in a minority at the Council table.⁵⁰ In February 2024, Bardella also warned that the unanimity rule was "*living on borrowed time*" due to the reforms needed to prepare for a future enlargement.⁵¹ Notably, Emmanuel Macron has spoken in favour of QMV in the fields of foreign policy and taxation, deeming it a precondition for the eventual accession of new members to the bloc. This could mean the RN's arguments against a shift to QMV as a precondition for further enlargement could also be driven in part by domestic politics, and be aimed at portraying Macron as more willing to compromise national interest at the foreign-policy level for the sake of EU enlargement.

The most recent public intervention on EU enlargement by a high-profile member of the RN came in response to the European Commission's recent (12 March 2024) endorsement of the opening of accession negotiations with Bosnia & Herzegovina.⁵² The RN MEP Jean-Lin Lacapelle, who is also a member of the Foreign Affairs Committee (AFET), posted a video on TikTok criticising President von der Leyen's decision. After expressing his overall opposition to EU enlargement, he called the recommendation regarding Bosnia & Herzegovina a "*particularly bad choice*", arguing that the country presents the "*most problematic aspects*" of all the nations on the list of candidate states, citing its ethnic divisions and the risk of perpetual political instability. He sought to arouse particular alarm about the risk of "*Islamic jihadism*", once again citing security concerns in line with the arguments expressed in recent years by other RN colleagues.⁵³

For RN, drawing an explicit link between further EU enlargement and migration allows the party to capitalise on the polarising effects of that issue.⁵⁴ By framing the debate around potential inflows of migrants, RN can reinforce an "Us vs Them" narrative focused on migration and organised crime with regard, in particular, to Muslim-populated countries and the Roma populations which the far right often associates with such activities. This narrative resonates especially with

the party's electoral base in southern France.⁵⁵ This strategy leverages decades of alarmist RN rhetoric concerning the risks of increased migration, an area in which they have considerable political experience and enables RN to redirect the discussion towards a topic where they have historically been effective and influential.

Overall, concerns over further migration flows and potential increases in organised crime weigh more than economic arguments and budgetary concerns in RN's opposition to enlargement, especially in the case of the Western Balkans. Nevertheless, foreign policy also figures among the key drivers of the party's stance on EU enlargement, as well as of its political affiliation at EU level.⁵⁶ Unlike the ECR, members of the newly-formed PfE and ESN groups tend to be less critical of—if not outright sympathetic towards—the Kremlin, being more or less aligned with Orbán's stance against the imposition of further sanctions and in favour of peace being made between Russia and Ukraine, even at the expense of the latter's territorial integrity.⁵⁷

Italy's Brothers of Italy: pro-enlargement with a nationalist twist

Country background

Since the Thessaloniki Summit in 2003, where the EU committed to integrating the Western Balkans into its fold, Italy has been one of the most vocal supporters of EU enlargement towards the Western Balkans. This vocal support has also translated into concrete policy initiatives: Italy is a participant in the Berlin Process, a diplomatic initiative launched in 2014 to support the European integration of the Western Balkans.

The country has also strengthened bilateral relations with individual Western Balkan countries, providing political backing, economic assistance, and technical cooperation to support their European integration efforts. Italy's bilateral engagement includes initiatives such as economic development projects, cultural exchanges, and support for civil society organisations. In recent years, Rome has played a crucial role in fostering dialogue and cooperation between Brussels and the Balkan countries, utilising platforms such as the Adriatic-Ionian Initiative (AII), a political forum launched in Ancona in 2020. Overall, this support has transcended political affiliations, with cross-partisan backing evident at local, national, and European levels, despite several changes of government (and nine different Prime Ministers) witnessed between 2003 and 2022.

These two decades of support for the EU accession of the Western Balkans has been attributed by existing studies to a series of factors: Traditionally, Italy's foreign policy has viewed the Balkan region as strategically significant, perceiving potential economic and security gains from EU enlargement in the region which largely outweigh any perceived costs. Italy views enlargement towards the Western Balkans as an opportunity to establish new alliances within EU decision-making processes.⁵⁸

Italy's support for EU enlargement is primarily driven by the desire to promote trade and economic exchanges, enhance capacities in justice and home affairs, combat corruption and transnational organised crime, strengthen the Rule of Law (RoL), and foster security and stability in the region. Italy believes that EU enlargement complements sub-regional cooperation platforms and considers the potential budgetary costs to be outweighed by the expected security and economic benefits that will ensue from the region's eventual integration into the EU. Indicatively, trade between Italy and its neighbouring Balkan countries, including EU member states Croatia and Slovenia, as well as candidate states such as Montenegro, North Macedonia, and Albania, along with potential candidate states Kosovo and Bosnia-Herzegovina, is worth €14 billion.⁵⁹

Overall, Italy evaluates the EU enlargement strategy positively, though not without reservations. Rome still sees a combination of incentives and pressures ('sticks and carrots') as the most effective means to encourage reforms and alignment with EU standards among candidate countries.

Fratelli d'Italia/Brothers of Italy (FdI)

In October 2022, the radical right-wing nationalist movement "Fratelli d'Italia" (FdI) secured a landslide electoral victory under the leadership of Giorgia Meloni and successfully formed a right-wing governmental coalition with the far-right Lega Nord and the centre-right Forza Italia.

The views on EU enlargement espoused by the coalitions that governed Italy between 2003 and 2022 demonstrated a

certain degree of consistency. It is therefore important to explore to what extent the views and policies of the current government coalition, which comprises two radical right anti-establishment parties, align with this largely favourable stance. The case of Italy and the FdI presents additional interest, since to date it is the only party in this case study that has led a ruling coalition.

Meloni's victory initially raised concerns in the transatlantic camp, which feared potential pro-Russia sympathies similar to those espoused by other populist parties across Europe in the light of Russia's invasion of Ukraine. Notwithstanding a series of controversial conservative measures implemented domestically, Meloni has so far pursued a pro-Western foreign policy whose blend of a pragmatic approach towards the EU and strong Atlanticism mirrors the longstanding approach of other Italian right-wing governments in past decades.⁶⁰

This has also been the case with EU enlargement and the Western Balkans: In January 2023, only two months after taking charge, Prime Minister Meloni urged the EU to develop "a new vision" for the Western Balkans and stated that enlargement should be among its top priorities. Meloni conveyed this message in a video address delivered during a conference held in Trieste addressing "Italy and the Western Balkans: Growth and Integration", underscoring the government's commitment to bolstering the presence of Italian companies in the Balkans.⁶¹

In December 2023, more than a year after assuming her role, Meloni reiterated support for enlargement once again, calling expansion "*a strategic choice for all of us*". However, she also called for more reforms at an EU level, given that "*30- 32 member States would new challenges*", adding that a discussion on the budget will be required beforehand, to sort out "*how EU politics are financed*".⁶² This statement occurred ahead of the EU Summit in Brussels at which the approval of accession talks with Ukraine and Moldova, both members at the time of the European Eastern Partnership, in a largely political decision in the wake of Russia's invasion in Ukraine, signalled a significant turning point/milestone for EU enlargement.

In the aftermath of the Summit, the Italian PM expressed "*great satisfaction with the concrete progress made at the European Council meeting in the enlargement process for Ukraine, Moldova, Georgia and Bosnia and Herzegovina*", calling it an "*achievement of significant value for the EU and Italy*". She also stated that "*our nation has played a leading role in actively supporting the Eastern Trio countries as well as Bosnia and Herzegovina and the Western Balkan countries*". Likewise, the Italian EU affairs minister at the time, Raffaele Fitto, who is also a member of the Fratelli d'Italia party, called on member states to reflect on their priorities and on "a new model", including a reform of the EU's financial capacity, before admitting new member states.⁶³ This is also in line with the European segment of the FdI electoral manifesto, published in 2022, which calls for a "*relaunch of the European integration system, for a Europe of Homelands, founded on the interests of the peoples and capable of addressing the challenges of our time*".⁶⁴ This emphasis on the need for EU reforms with a particular focus on the EU budget could be an attempt to avoid alienating its domestic audience, which could serve to politicise EU enlargement as has happened in other member states like Germany and Austria.

On Ukraine and Moldova, the latest states to enter EU accession talks, Meloni's Italy has also aligned with the European Commission and the broader pro-enlargement camp. Earlier in 2024, the Italian government again demonstrated its favourable stance on enlargement: following the European Council approving the opening of accession talks with Bosnia & Herzegovina, Meloni stated her preference for calling enlargement a project of "reunification", citing the continent's common history and geography. Furthermore, she emphasised Italy's "*leading role in this initiative*".⁶⁵

The party's overall favourable stance towards EU enlargement has been reflected at a European Parliament level as well. The Fratelli d'Italia is one of the ECR-affiliated parties that has voted in favour of the Commission's previous annual enlargement reports and enlargement strategies. In fact, as the current powerhouse of the Eurosceptic group, Meloni has recently helped shape a more coherent ECR stance on the issue, evidenced in its manifesto for the EU elections of June 2024.⁶⁶

In other words, the governing coalition under Meloni has largely opted for continuity rather than change with regard to previous ruling coalitions. The Meloni-led coalition has actually demonstrated greater zeal for supporting the enlargement process than previous right-wing Italian governments led by Silvio Berlusconi.⁶⁷ Besides seeking to maximise benefits relating to Italy's trade and investment ties, Meloni's pro-enlargement stance—and her support for Ukraine's EU aspirations, in particular—can also be seen as a strategic move to legitimise her party on the international stage. In spite of its controversial conservative policies domestically, FdI has managed to establish itself as a reliable partner in the eyes

of its partners, having boosted its pro-Western credentials through *inter alia* its continuous material support for Ukraine and its lukewarm stance towards China, with Italy quitting the Belt and Road Initiative.

Another aspect that needs to be considered as a driver of the party's enlargement position is the domestic political landscape. There, it is also fuelled by intra-coalition dynamics, given the competition brewing between Meloni and her coalition partner and foreign minister Antonio Tajani, the leader of Forza Italia—for decades the powerhouse of the mainstream Italian right, but increasingly sidelined since 2022 by Meloni's FdI—ahead of future electoral campaigns. Meloni has already taken votes from its other junior partner, the Lega, a party that historically has had no clear stance on EU enlargement and has shown an inclination to be pro-Russia.

Interestingly, Meloni and her party justify their support for EU enlargement in strategic terms, adding a strong national element to their enlargement policy grounded in perceived economic, geopolitical, and security interests and reflecting the country's self-perception as an "Adriatic power". This position has allowed the Italian government to tie its conditional support for EU enlargement in the Western Balkans to migration control measures and other strategic interests such as economic ties. In February 2024, Rome signed an agreement with Tirana, externalising the processing of asylum requests in migration hubs in Albania. This aligns with the FdI-led government's tough stance on migration and preference for the externalisation of border controls.

Finally, Meloni's support for EU enlargement could have implications for broader EU integration. A parallel could be drawn between Meloni's supportive stance on EU enlargement and the traditional UK position during its time in the EU.⁶⁸ The UK was initially a strong advocate for EU enlargement, particularly in the 1990s, as a means of preventing deeper political integration and federalism within the EU. By promoting the accession of new member states, the UK aimed to dilute the push for a more centralised EU. To some extent, it could be argued that Meloni's pro-enlargement stance, coupled with her party's broader Euroscepticism, could grow into a policy that resembles the UK's past strategy. By advocating the inclusion of new member states, Meloni could counterbalance the push for deeper vertical integration within the EU, advocating for "*a EuropG ofi nation-s'tatGs*" that includes like-minded candidates, with the European Council continuing to call the shots in an intergovernmental rather than a supranational federalist setting.

Spain's VOX: nativist with unclear position on enlargement

Country background

Spain has been a supporter of EU enlargement in the Western Balkans, albeit with notable reservations when it comes to the need for strict criteria regarding Rule of Law, governance and economic reform to be met.

A noteworthy element of Spain's position is its refusal to recognise Kosovo's independence, which was declared in 2008. This is mainly due to Spain's own concerns about secessionist movements, particularly in Catalonia and the Basque Country. However, Spain has actively backed the candidacies of Serbia, Montenegro, Albania, and North Macedonia, with Madrid remaining consistently in line with the broader EU strategy. In June 2022, Spain supported the EU's decision to grant Ukraine and Moldova official candidate status with the country's foreign minister, José Manuel Albares framing his government's firm backing as part of a larger European effort to safeguard Ukraine's sovereignty and support its long-term recovery and reform.⁶⁹

In spite of its longstanding support for EU enlargement, Spain also tends to align with those EU countries that argue for a more gradual, conditional approach to enlargement, rather than a fast-tracked process, particularly for countries which are still undergoing substantial reforms. Spain joined the "Group of Friends of Qualified Majority Voting in the Common Foreign and Security Policy" in May 2023 to push for QMV in EU foreign policy, in line with France and Germany's calls to adapt EU decision-making to accommodate enlargement, while also advocating for strict conditionality.

In fact, Spain's approach has been quite pragmatic: remaining strongly focusing on conditionality, it has never blocked the enlargement process.⁷⁰ This illustrates an effort to balance solidarity with candidate countries against protecting its own domestic priorities. For instance, in recent discussions within the Atlantic group—an informal intra-EU coalition consisting of countries with strong ties to the Atlantic, including Spain, France, Portugal, Ireland, Belgium, the Netherlands, and Denmark—Spain expressed concerns that the financial costs of enlargement could impact national interests, such as agricultural aid.

Spanish citizens are largely pro-European, with the 2023 Eurobarometer revealing that 71% were in favour of EU enlargement, which is well-above the EU average.⁷¹ As a result, enlargement has never been subject to domestic political debate, as it has been in countries like Austria.

VOX/VoicG

Founded in 2013, the populist radical right-wing party VOX (“voice”) had emerged as a major force in Spanish politics by 2019.

Initially formed by breakaway members from the centre-right PP, VOX capitalised on nationalist sentiments and opposition to separatism in Catalonia and the Basque Country. It aligns with other European far-right movements, advocating for strict immigration controls, anti-Muslim policies, traditional values, and scepticism towards certain EU policies. Despite losing seats in the 2023 elections, it remains Spain's third-largest party.

In the 2023 Spanish general election, VOX lost 19 seats, dropping from 52 seats in the Congress of Deputies to 33. VOX peaked after the November 2019 election, in which it garnered 3.6 million votes and became the third-largest party in the Spanish Parliament. In the European elections in June 2024, it won six seats in the European Parliament, which once again put it in third place among Spanish parties.

VOX has actively promoted nativism.⁷² The party's ideology is rooted in the belief that the Spanish identity must be preserved, emphasising a defence of traditional Spanish values and a strong stance against both internal threats, like secessionist movements, and external threats, particularly immigration. Its preoccupation with issues pertaining to the domestic political agenda contrasts sharply with its vague foreign policy agenda. As noted by Elena Venture of Carnegie Europe: “*VOX's approach to foreign policy derives from this domestic emphasis and is therefore anchored in a firm anti-immigration stance, strong defence of Spain's national interests, and opposition to EU policies, which the party perceives as violating the country's sovereignty.*”⁷³

Likewise, its EU policy is largely shaped by its own domestic agenda. While not opposing Spain's EU membership, it has reiterated the right of EU member states to leave the bloc under Article 50 of the Treaty on European Union (TEU). This point was enshrined in the party's 2019 European elections manifesto, which warns that “*any reform to the contrary would be an attack on the spirit of integration.*”⁷⁴ With regards to enlargement, VOX has not been outspoken and has no coherent or clearly defined stance on the issue, which does not form part of its agenda. However, its MEP and vice-chair Hermann Tertsch voted against the 2023 enlargement package recommending the opening of negotiations with Ukraine and Moldova.⁷⁵

In the 2019-2024 mandate of the European Parliament, VOX was a member of the “soft” Eurosceptic ECR, along with Meloni's Fdl, the Polish Justice & Law Party, the Sweden Democrats and others. However, in July 2024, following the latest EU elections, VOX's leadership announced its decision to quit the Meloni-led group and join the newly-formed successor of the ID, the Orbán-led Patriots for Europe. This shift was made amid an ongoing process of reconfigurations taking place to the right of the political mainstream.⁷⁶

For now, the strategic decision VOX made earlier this year to leave regional coalitions and distance itself from the political establishment is part of a broader push to distinguish itself in Spanish politics. VOX's lack of a defined position on EU enlargement may change due to its new alliances.⁷⁷ Historically, VOX's rise was driven by opposition to Catalan separatism, not immigration as with other European far-right parties. However, in recent years, VOX has followed the example of other far-right parties and increasingly focused on migration. Having now joined forces with parties including Orbán's Fidesz and France's RN, VOX could well adopt a more formal stance on EU enlargement, especially with regard to Ukraine and the Western Balkans. Orbán supports the accession of the Western Balkans, but is against Ukraine's membership due to its political and economic implications. It remains to be seen whether VOX will adopt a similar differentiated stance in the months ahead.

Netherlands' Party for Freedom: anti-enlargement rhetoric meets coalition politics

Country background

Over the past two decades, the Netherlands has displayed an increasingly cautious and stringent approach towards EU enlargement.⁷⁸

In the early 2000s, the Netherlands was broadly supportive of EU enlargement, viewing it as a means to stabilise the Western Balkans. However, the expansion of the EU in 2004 and subsequent enlargements in 2007 and 2013 altered the internal balance of power within the Union, leading to concerns in the Netherlands about its diminished influence. This, coupled with the Eurozone crisis, heightened fears about the economic implications of further enlargement.⁷⁹ The crisis highlighted the potential financial burdens on the Netherlands as a significant net contributor to the EU budget, especially if new members were economically weaker.

The Dutch approach has been marked by a "strict but fair" policy. Over the past decade, the country adopted a more constructive approach to EU enlargement under the previous government led by Mark Rutte, backing various policy mechanisms to help the Western Balkan countries meet the accession criteria.⁸⁰ However, they also demanded progress on key reforms, particularly in governance and the Rule of Law, before they would support further enlargement. For example, in 2019, the Dutch Parliament rejected the European Commission's recommendation to open accession negotiations with Albania, citing inadequate progress in combating corruption and organised crime.⁸¹ Following the Russian invasion of Ukraine, the Dutch Parliament demanded the inclusion of geopolitical alignment alongside traditional RoL criteria, emphasising that candidate countries must align their foreign policy with the EU's, including implementing sanctions against Moscow.⁸²

Since February 2022, public support for EU enlargement has risen significantly across Europe, including in traditionally sceptical countries like the Netherlands. The most recent ECFR survey indicated that even in the Netherlands, there has been a noticeable shift in public opinion in favour of enlargement, driven by the geopolitical context and security considerations following Russia's act of aggression against Ukraine. Nevertheless, the Dutch population remains among the most enlargement-sceptic in the bloc. A barometer survey published by Clingendael in March 2024 revealed that the accession of Ukraine alone has the support of a majority of the Dutch people. On the contrary, the Dutch public remains hesitant regarding the potential accession of the Western Balkans: only 40% of respondents were in favour of Serbia's, Albania's and Kosovo's accession while approximately 50% supported the accession of North Macedonia, Bosnia and Herzegovina and Montenegro. Migration and the free movement of people cited among the public's key concerns.⁸³

Partij voor de Vrijheid/Party for Freedom (PVV)

The PVV is led by Geert Wilders, a far-right ideologue known for opposing Islam. Over the years, he has advocated for the Netherlands' withdrawal from the EU and, most recently, called for an end of EU support for Ukraine. With regards to the EU enlargement, in the run up to the Dutch general elections in 2010, the PVV called for a halt to any further EU enlargement, opposing Croatia's accession. Its leader in the European Parliament, Barry Madlener, went so far as to advocate for expelling Romania and Bulgaria from the EU just three years after their accession.⁸⁴

According to its 2023 election manifesto, the PVV wanted "*a sovereign Netherlands, a Netherlands that is in charge of its own currency, its own borders and makes its own rules*". Rejecting a "political union" like the EU, it advocated for a Dutch exit from the EU, a "Nexit".⁸⁵

However, following the electoral results of November 2023, and after entering into coalition talks, Wilders has signalled a U-turn in the PVV's stance on EU membership. Departing from its longstanding position, its manifesto/programme for the EU elections, published in April 2024, called instead for a binding referendum on the matter. The party's focus now seems to be on reforming the EU from within. The party now deems "*intensive economic cooperation*" to be beneficial and wants to limit the power of Brussels without advocating for a complete exit. To that end, it is pushing for the restoration of the Netherlands' power of veto over EU decision-making and for turning the country into a net recipient of EU funds rather than a net contributor. In particular, the manifesto states, "*We are putting our energy to reforming the EU from within*", rejecting the idea of a "*European superstate*".⁸⁶ Geert Wilders, who dictates the party's direction, has realised that cooperating with leaders like Viktor Orbán and observing examples like Meloni in Italy can help it achieve its objectives more effectively than pleading for a Nexit.⁸⁷

Nevertheless, as with the RN in France, despite watering down its overall anti- EU rhetoric, the party has not softened its stance on EU enlargement. PVV has maintained a consistent stance against the accession of the Western Balkan states,

and Bosnia & Herzegovina, Kosovo and Albania in particular, given their significant Muslim populations. Overall, PVV foreign policy is heavily influenced by its view that Islam poses what Wilders terms “*an existing problem*”.⁸⁸ This viewpoint shapes the party's stance on several issues, including EU enlargement. Its longstanding opposition to EU enlargement was reiterated once again in its latest electoral manifesto in April 2024, in which it explicitly states that the PVV stands against “*further expansion of the EU or steps in that direction*”. Notably, since the manifesto was published a few months after the EU decided to open accession negotiations with Ukraine and Moldova, it indicates an objection that extends beyond the Western Balkans.

In an interview with Euronews in December 2023, Wilders once again made it clear that he opposes the inclusion of any new countries in the EU, specifically mentioning Ukraine. He stated, “*No, I think that no other country should join Europe. I'm even in favour of Romania and Bulgaria to leave [sic] the EU*”.⁸⁹ Wilders explained that the Dutch public believes the EU is already too large and that a smaller Europe with fewer responsibilities is preferable. He also argued that Romania and Bulgaria were “*very unready and very corrupt*” at the time of their accession, which contributed to his party's opposition to further enlargement. Given his strong anti-migration rhetoric, coupled with his having already advocated for a restriction of labour mobility within the EU through the introduction of work permits, any further expansion of the single market and the free movement of people would clearly go against the core of his party's agenda.

After six months of negotiations, with Wilders relinquishing his bid to become prime minister, his PVV party joined a government coalition in May 2024 with the centre-right People's Party for Freedom and Democracy (VVD), the right-wing populist Farmer-Citizen Movement (BBB) and the centrist New Social Contract (NSC). The dynamics of the coalition meant the PVV had to moderate some of its extreme positions, such as banning the Quran and mosques. Still, the PVV has remained firm in its anti-enlargement stance. The (preliminary) coalition agreement also included a line on EU enlargement: while the coalition agreement does not reject the EU enlargement process outright, it indicates that the Dutch government will be highly critical and not give any candidate the benefit of the doubt. More specifically, the recently-formed coalition agreed that the government reserves the right to “*restrict the free movement of persons within the EU if and insofar as expansion of the EU is discussed*”, emphasising the importance of retaining national sovereignty and being critical of further enlargement.⁹⁰

Although the Netherlands has always been moderately wary of EU enlargement, the above indicates a notable consensus vis-à-vis the coalition's scepticism towards the acceptance of new member states. In principle, the VVD, NSC and BBB, PVV's three coalition partners, are not inherently against EU enlargement, as long as the candidate states fulfil the relevant criteria. Additionally, however, parties like the centre-right VVD were not willing to invest significant political capital and jeopardise progress in the coalition talks over EU enlargement, which was a red line for the PVV with Wilders reiterating his anti-enlargement views in his pre-election statements. Instead, more pressing issues like the cost of living, migration and the war in Ukraine have dominated the agenda, reducing the immediate focus on enlargement. In other words, accommodating the PVV's stance on EU enlargement was one of the easier issues for the negotiating parties to agree on, along with a tougher approach to migration.

The current coalition's critical stance on EU enlargement suggests it will be difficult for any candidate country to convince the Dutch government of their readiness for membership. Budgetary constraints could also lead to the Netherlands closing embassies, including potentially in the Western Balkans.⁹¹ All the above could suggest a potential departure from the country's more engaged position under former Prime Minister Mark Rutte.

In summary, while the Netherlands has taken a more constructive approach towards EU enlargement in the past, particularly under Mark Rutte's government, the inclusion of the PVV in the current coalition has amplified the Dutch government's scepticism with regard to EU enlargement. This provides a tangible example of the European Far Right capitalising on its political capital to influence the government's position on various fronts, including EU enlargement.

Sweden's Sweden Democrats: vague on enlargement, firm on sovereignty

Country background

Since 2003, Sweden has been a strong advocate for the integration of the Western Balkans into the EU, pushing for reforms and progress towards accession. Like Madrid, Stockholm also insists on the importance of candidate states fulfilling the Copenhagen criteria, which include stable institutions, a functioning market economy, and adherence to EU laws and regulations.

Enlargement was one of the key priorities of the first Swedish presidency of the EU Council in 2001 ahead of the 2004 “Big Bang” enlargement.⁹² Sweden would also promote EU enlargement during its Council presidency in 2009; however, the period was marked by economic and institutional challenges and the presidency focused on pragmatic brokerage rather than strong leadership. Thus, while it supported enlargement, it did not make significant breakthroughs in this area,⁹³ largely due to the broader enlargement fatigue the EU experienced after the membership accessions of the 2004-2007 period. However, alongside Poland, Sweden played a leading role in the launch of the EU’s Eastern Partnership.

The Russian invasion of Ukraine in 2022 significantly shifted the EU's enlargement dynamics, while also reinvigorating Sweden’s support for enlargement. Since then, Sweden has strongly supported the granting of candidate status to Ukraine and Moldova, aligning with the broader EU strategy to integrate these countries more closely into European structures. Building on that, Sweden's presidency in the first half of 2023 focused on reinvigorating the enlargement process, advocating for institutional reforms to accommodate new members and ensuring a strategic approach to future enlargements. Overall, Sweden's political elites favour enlargement, reflecting public sentiment following Russia's invasion of Ukraine, with a Eurobarometer survey in 2023 showing that a strong majority (60%) of the Swedish population backed enlargement.⁹⁴ A 2023 ECFR study revealed that Ukraine figured particularly high as an enlargement priority.⁹⁵ Sweden is traditionally in favour of institutional reform, including a shift to QMV in the CFSP, and has joined the German-led “Friends of Qualified Majority Voting”. Overall, the country has belonged to the pro-enlargement camp since it joined the EU in 1995, with a strong focus on conditionality.

Nevertheless, Sweden's approach to EU policy stands out because it is highly depoliticised and rarely forms part of electoral manifestos or political debate. At the national level, EU affairs are often perceived as economic issues, which receive broad public support without significant debate. Despite the country’s historically vocal supportive stance, due to geographic and political distance EU enlargement is not a major issue in Sweden, as it is in countries like Austria; a potential accession route for Turkey is the only exception to this rule. In addition, support for enlargement remains strong from the government and the major centrist parties. Yet, at the same time there is also low support for pairing enlargement with deepened integration.

Sverigedemokraterna/Sweden Democrats (SD)

Since October 2022, after finishing second in the general elections of the previous month with 20.5% of the vote, the Sweden Democrats (SD), a nationalistic and populist radical right party, have been supporting a minority government formed by a pro-European centre-right coalition comprising the Moderates, Christian Democrats and Liberals. By providing its support on an ad hoc basis to the minority government, the SD have managed to influence certain policies and set the agenda of the ruling coalition in different areas, but primarily migration, law and order, and climate policy.

Similar to other radical right parties included in our study, the SD’s broader position towards EU membership has undergone a shift in recent years from an explicitly anti-EU towards a Eurosceptic stance. Indicatively, there have been non calls for a “Swexit” since 2018.⁵ However, key party figures have been calling for several decision-making powers to be returned to member states. For example, they have called for an opt out in justice and home affairs that would allow the country to defy the recently adopted new EU migration and asylum rules.⁹⁶

In an article they co-wrote published in February 2024, Jimmie Åkesson, leader of the Sweden Democrats, and Charlie Weimers, Vice-President of the European Conservatives and Reformists (ECR), proposed that references to the EU be removed from the Swedish Constitution, and in particular the phrase “*Sweden is part of the European Union*”, which was incorporated into the Swedish Constitution in 2010.⁹⁷ This move largely reflects the party’s focus on prioritising Sweden’s sovereignty and interests in its EU dealings, indicating its nativist viewpoint.

On foreign policy, the SD have become increasingly pro-NATO and critical of Russia since the latter's invasion of Ukraine, mirroring the change of stance of several ECR members such as the Fratelli d'Italia and the Polish Law & Justice Party. Earlier in 2024, its MEP and Committee on Foreign Affairs member Charlie Weimers openly opposed the potential inclusion of Victor Orbán's Fidesz party in the ECR group, primarily to "*secure that ECR remains an Atlanticist and Putin-critical group*".⁹⁸

Despite their overall pro-Western foreign policy orientation, the SD have been against or lukewarm at best about further EU enlargement, with the exception of Turkey's EU prospects, to which they have adopted an openly hostile position. In their 2019 European election manifesto, the SD questioned whether the EU was "*capable of admitting more members*", citing economic challenges and the questionable capacity of new members to control their borders as their two key areas of concern.⁹⁹ In an interview with Swedish media in March 2024, MEP Weimers reiterated the party's economic argument against further enlargement, stating that the "*Union mainly benefits from more net paying countries*" rather than grant recipients. Instead, he called for alternatives to membership "*to secure good relations with the WGst*", should candidate states not be in a position to meet the conditionality criteria, warning against any "*relaxation of the demands that were made with Romania and Bulgaria for political reasons*".¹⁰⁰

Since becoming a support party for Ulf Kristersson's government, the SD's opposition to Sweden's EU policy in the national parliament has decreased significantly. Indicatively, there has been a drastic drop in the Sweden Democrats' dissenting opinions, from 39% during the first Löfven government (2014-2018) to only 4% between October 2022 and December 2023. The Sweden Democrats dissented on twelve occasions, in relation inter alia to the conclusions on the enlargement and stabilisation and association process, and to Bosnia and Herzegovina's candidate status.¹⁰¹

In the European Parliament, the SD have either abstained or voted against the Commission's EU enlargement reports and strategies, as well as the Association Agreements with Moldova and Ukraine.¹⁰² This is in contrast with Italy's Fratelli d'Italia and closer to the stance adopted by the majority of what were ID members at the time, rather than the ECR group. According to AssistEU's classification, the SD is clearly closer to the former ID / current PöF than they are to the ECR in areas such as EU enlargement, the free movement of persons, emergency aid and monetary issues. According to Weimers himself, this is because the SD have a more fiscally conservative policy on budgetary issues compared to the ECR group; he also notes that the ECR group was heavily influenced by the Polish delegation during the previous mandate (2019-2024), and that Poland is a significant net recipient of EU funds.¹⁰³

In sum, the SD have been willing to acknowledge "*the mixed results of the EU's eastern expansion*", arguing that the enlargement has supported state development but have also come at a cost due to low-wage competition, organised crime, corruption, and migration challenges. They claim that the EU is not currently capable of integrating more members without making these issues worse still. To support the development of neighbouring countries, they recommend enhancing trade rather than providing accession aid. The SD also oppose EU Pre-accession Assistance, arguing that reliance on accession aid undermines the long-term self-sufficiency of candidate countries and suggesting that aid should go to poorer, vulnerable populations in developing countries.

Overall, despite their Euroscepticism, the SD approach to EU enlargement is not as aggressive as that of other radical right parties in Europe. In fact, in spite of its expressed scepticism towards the accession of more member states, the SD do not actually have a concrete or well-defined policy on EU enlargement.¹⁰⁴ Their electoral campaigns are largely focused on domestic issues, on migration and crime prevention in the main, rather than EU-related issues. Despite a series of objections pertaining to the Rule of Law and budgetary implications, their overall influence on Sweden's stance towards EU enlargement is limited compared to other political priorities in relation to which they have successfully shaped the government's agenda.

As it did during the national elections of 2022, their latest EU election campaign largely revolved around migration and crime prevention, which SD members tend to link to immigration from the Middle East rather than the Western Balkans or Eastern European states. EU enlargement remains an issue of limited political interest domestically; in contrast with other member states in our study, in Sweden it does not provide fertile ground for politicisation for the sake of political gains. However, given the party's emphasis on sovereignty and the repatriation of decision-making powers to the national level, the SD have opposed a move towards QMV in the Council. Thus, despite its lack of a coherent EU enlargement position, the SD are openly against a series of reforms and deeper integration measures that would be needed to potentially accommodate new member states.

There are interesting parallels between the SD and Finland's Finns Party, another Nordic radical right party. Unlike the SD, which is currently providing conditional support to a minority government, the Finns Party has been part of a four-party coalition since 2021. Like several other parties in our study, they have toned down their anti-EU rhetoric without abandoning their core Eurosceptic views.

Similarly, they have embraced a pro-NATO stance following Russia's invasion of Ukraine, backing Finland's bid to join the military alliance. As in the case of the SD, this can be explained by particularities of the country: namely, its geographic proximity to, and difficult past with, Russia/the Soviet Union. Unlike the SD, however, the Finns have openly expressed an anti-enlargement position, even though they also tend to focus mostly on domestic issues such as migration and climate policy. Overall, the attention paid to enlargement by Nordic radical right parties remain limited, with Ukraine dominating their positions, since they see supporting Ukraine as politically advantageous.

Austria's Freedom Party: a purely anti-enlargement party ready to govern

Country background

Overall, Austria has been a staunch supporter of the EU enlargement process, particularly in relation to the Western Balkans, a policy which largely reflects the country's geographical proximity and historical ties to the region. Vienna has been a consistent supporter of the EU's Economic and Investment Plan for the Western Balkans, which aims to foster long-term economic recovery and development in the region.¹⁰⁵ It has also been a pioneer in the "Friends of the Western Balkans", an informal group initiated by Foreign Minister Alexander Schallenberg in 2023 and consisting also of the foreign ministers of Greece, Italy, Croatia, Slovakia, Slovenia, and the Czech Republic.¹⁰⁶

In May 2022, Schallenberg and Austria's Europe minister Karoline Edtstadler proposed the gradual integration of six Western Balkan countries into the EU framework. This proposal includes cooperation in areas like the single market, customs, energy, and transport infrastructure, along with enhanced collaboration with Frontex and Europol.¹⁰⁷ However, when it comes to supporting Ukraine and Moldova's accession bids, the current Austrian government, which is ruled by a coalition between the centre-right Austria's People Party (ÖVP) and the Greens, has indicated support. However, it has also put pressure to ensure that the Western Balkans are not left behind.

Ahead of the December 2023 Western Balkans Summit and European Council Meeting, Austrian Chancellor and ÖVP leader Karl Nehammer argued that "*there should be no preferential treatment for Ukraine, especially over Bosnia and Herzegovina, which is now also in accession negotiations*". He opposed fast-tracking Ukraine's accession negotiations, insisting instead on offering Ukraine and Moldova a perspective for accession, but without expedited procedures. Alternatively, Vienna insisted that the EU should open accession talks with Bosnia-Herzegovina if it does so with Ukraine.¹⁰⁸

Ultimately, Bosnia-Herzegovina successfully secured the opening of accession talks a few months later, in March 2024. However, Austria's stance in December 2023, prompted critics to argue that Austria was using Bosnia-Herzegovina's accession bid to indirectly block the path available to Ukraine.¹⁰⁹ Besides Vienna's longstanding support for the accession of the Western Balkans, another factor contributing to its more sceptical position vis-à-vis Ukraine and Moldova has been the domestic political landscape in Austria and the FPÖ's increasing political sway after winning the most votes in the September 2024 general elections. As outlined in the next section, the FPÖ's growing influence has sparked a series of contentious debates on issues such as support for Ukraine and migration policies.

It is worth noting that, despite the consistent pro-enlargement position maintained by the country's governmental elites, with regard to the Western Balkans at least, several polls held over the years indicate that the Austrian population tends to be highly sceptical about enlargement.¹¹⁰ A 2023 survey by the Austrian Society for European Policy (ÖGfE) revealed that Bosnia & Herzegovina had the highest approval among Austrians, with a mere 29% in favour of the nation's accession, 41% opposed, 19% indifferent, and 11% undecided, whereas Kosovo had the lowest approval at 16%, with a 53% rejection rate. Only 24% supported Ukraine's EU accession, while 49% were opposed, 15% were indifferent, and 11% undecided. Opinions had remained stable since July 2022.

Freiheitliche Partei Österreichs/Freedom Party of Austria (FPÖ)

The FPÖ was founded in 1956, originally comprising various nationalist groups. Unlike the majority of far-right parties across the EU, it has been part of various governmental coalitions as a junior partner over the years, first with the Social Democratic Party (SPÖ) (1983-1986) and later with the ÖVP on two separate occasions (2000-2006 and 2017-2019). Under Jörg Haider's leadership after 1986, the FPÖ adopted a more Eurosceptic, largely nationalistic and xenophobic stance. Its latest involvement in a governmental coalition, along with its return to power in the last elections after months of leading the polls, has allowed the party to influence Austria's policy direction from within.

The FPÖ's stance towards the EU has thus evolved from initial support for European integration to increasing Euroscepticism, especially during Austria's EU accession negotiations in the early 1990s. Although it has never called for an exit from the EU, it opposes EU centralism and advocates for national sovereignty. It also rejects treaty reforms that would increase Brussels' power and opposes majority voting in the EU Council. However, under Herbert Kickl, the FPÖ has recently intensified its anti-EU rhetoric. Similar to other radical right parties across the bloc, foreign policy has never been a central focus for the FPÖ, while migration has always figured high on its agenda. The party prioritises the protection of Austria's identity, following a conservative and narrowly nationalist approach encapsulated by their slogan "Austria First".

Historically, the FPÖ harbours anti-American sentiments and demonstrates considerable sympathy for Russia. Following Russia's annexation of Crimea in 2014, the FPÖ condemned EU sanctions against Moscow. However, although the FPÖ held the Foreign Ministry portfolio during the ÖVP-FPÖ coalition of 2017-2019, it did not result into any concrete shifts away from the country's traditional foreign policy orientation, which mirrors that of the EU. Nevertheless, in contrast with several like-minded parties across Europe, such as the Sweden Democrats, the FdI, or even the RN, the FPÖ has not altered its stance towards the Kremlin since the Russian invasion of Ukraine in 2022. It continues to oppose sanctions against Russia, arguing that they violate Austria's neutrality. Its leader Herbert Kickl has advocated for understanding both sides, partly blaming the US for the conflict. The party is also critical of EU military support for Ukraine.

On EU enlargement, the FPÖ has an overall position that ranges from sceptical to hostile, depending on the candidate state. As Stephan Lehne, senior fellow at Carnegie Europe, highlights in a research paper published in April 2024, the FPÖ has effectively exploited public scepticism towards EU enlargement to bolster its political standing, heavily criticising the government for its favourable stance towards the accession of the nations of the Western Balkans.¹¹¹ While the FPÖ's negative stance towards enlargement is underpinned by its opposition to further migration flows and to the EU straining its budget further by allowing the accession of more net-recipient states, there is also a more opportunistic element to its stance, given that the polls indicate the Austrian population as a whole is highly sceptical vis-à-vis enlargement.

To date, the FPÖ has adopted a highly critical stance towards the EU's position on Ukraine's accession bid, with its leader Herbert Kickl, who has described Victor Orbán as his political "role model", being particularly outspoken on the matter.¹¹² In November 2023, a month before the EU's decision to open negotiations with Ukraine and Moldova, he lambasted the EU for wanting to admit "*a country at war with another country*" as "political insanity". He also accused Brussels elites of dragging the EU and Austria "*into an economic war that is incompatible with our eternal neutrality*". He pointed out that Ukraine's accession would have very serious consequences for the bloc's budgetary balance, arguing that "*Ukraine alone would need around 15% of the total EU budget*". He has also placed especial focus on agricultural subsidies, claiming that under the current financial framework for 2021-2027, "*Ukraine would be entitled to nearly a third of the budget for agricultural subsidies, and an additional 61 billion euros from the EU's cohesion funds*." Finally, he argued that "*Ukraine does not fulfil the Copenhagen criteria for joining the EU in the slightest*" due to "*massive corruption problem*"; and called on the ÖVP-Greens governing coalition to vote against Ukraine's accession.¹¹³

Similarly, in an interview in March 2024, Petra Steger, a member of the Austrian parliament and the FPÖ's spokesperson on European affairs, argued that "*a serious taboo has been broken in Europe, with the opening of EU accession negotiations with a country at war*". She also placed particular emphasis on the Copenhagen criteria, questioning whether Ukraine fulfils even a single criterion from either a political or economic point of view. However, particularly noteworthy was her statement that: "*the FPÖ is of the opinion that we should not forget about the real candidate countries*".¹¹⁴ Despite the party's sceptical stance towards EU enlargement overall, the above indicates a distinction between the way it views the potential accession of the Western Balkans, on the one hand, and of Ukraine, on the other.

Another interesting tendency is the distinction drawn by senior FPÖ figures between Western Balkan states themselves. For example, in May 2023, the party's co-leader Dominik Nepp remarked that the EU often appears "insincere" in relation to the accession prospects of the Western Balkan countries, creating the impression of double standards in the accession process. He noted that Serbia has faced the imposition of constant new conditions during its negotiations, arguing that other countries have received more favourable treatment. Regarding Kosovo, Nepp stressed that its EU membership should only occur once a mutually acceptable resolution to the Kosovo issue has been found and agreed on. This sentiment has also been echoed by Maximilian Krauss, head of the FPÖ parliamentary group in the Vienna Assembly, who condemned the "*blackmail methods*" the EU has applied to Serbia, especially in the pressure it has applied on the country to impose sanctions on Russia.

This differentiated approach is driven by political calculations. Like the AfD in Germany, the FPÖ has tailored its political narrative to gain votes by highlighting issues that resonate with the electorate, and particularly with Austria's sizeable Serbian community. This strategy includes adopting a pro-Serbian stance as opposed to the hard line it takes towards countries like Albania and—especially—Kosovo, in relation to which they have retained a broader Eurosceptic and anti-immigration rhetoric. In other words, the FPÖ's position is not only about EU enlargement as a whole, and is nuanced to favour the potential accession of specific countries like Serbia and, to some extent, Montenegro, provided that they fulfil the Copenhagen criteria, rather than treating the Western Balkans as a single entity. A series of reports and studies seem to confirm this view, suggesting that a part of the Serbian community in Austria has increasingly espoused the FPÖ's anti-migrant views—somewhat paradoxically, given its status as the second largest migrant community in the country.

Particularly under its former leader and former vice-Chancellor Heinz-Christian Strache, the FPÖ courted Serbian votes by opposing Kosovo's independence and appealing to anti-Muslim sentiment among Orthodox Christian Serbs.¹¹⁵ Strache promised to reverse Austria's recognition of Kosovo, although he did not do so during in 2017-2019, when the ÖVP was part of the government coalition and he himself served as vice-Chancellor. The strategy sought to resonate with the over 100,000 Austrian citizens of Serbian origin. Despite these efforts, analysis conducted in 2020 by the Austrian market research company OGM showed that the FPÖ had had only limited success. The Serbian community in Vienna largely remained loyal to the centre-left Social Democratic Party of Austria (SPÖ) in the general elections of 2019, with about 46% supporting the SPÖ. Only 9% of Viennese Serbs voted for the FPÖ, indicating that the party's outreach had not significantly altered established voting patterns.¹¹⁶

Nevertheless, the recent public interventions by key party figures, with Nepp and Krauss lambasting Kosovo as well as what they called the EU's double standards towards candidate states can, in part, be viewed through this prism: as a revamped effort to lure the Serbian community of over 100,000, which is considerable given Austria's total population of 9 million. This is indicative of a tendency to politicise EU enlargement for electoral gains.¹¹⁷

Understanding the challenge posed by Eurosceptic radical parties

Making sense of the challenge: The key strands in anti-enlargement stances

Post-Brexit, exiting the EU or the Euro has become a taboo topic for most radical right parties across Europe. In Western Europe, the only exception is the German AfD, as our analysis has demonstrated. Instead, EU membership now provides these parties with leverage to influence EU policies, particularly in areas such as migration, climate change, enlargement and support for Ukraine. Hungary's Viktor Orbán and his intergovernmental bargaining have demonstrated this new strategy in recent years.

Another interesting trend is the emergence of a new Euro-centric discourse among many far-right parties, which now position themselves as "Defenders of Europe". This includes rhetoric centred on preventing the "decline of Europe" and protecting European civilisation, and is more pronounced in parties like the SD and the RN and less so in the AfD and PVV. Recent studies describe this as "ethnoregionalism": focusing on the interests of the "European people" within a narrow geographic scope limited to current EU borders.¹¹⁸

Despite moderating their anti-EU rhetoric and refraining from questioning the merits of EU membership, the AfD, FPÖ, PVV, and RN continue to oppose EU enlargement, whereas the SD and VOX maintain a more lukewarm or ambiguous stance. In contrast, Fdi is strongly supportive of EU enlargement.

From the above findings, it is evident that there are certain overlaps in their rationales against the accession of new member states. However, this study revealed that not all parties place the same emphasis on the issue of EU enlargement or the EU project in general. The SD and VOX are notable examples: neither has a concrete or well-defined policy on EU enlargement and both lack a coherent and well-articulated stance on the topic. It is noteworthy that in Spain, a significant majority of the population supports EU enlargement, including the accession of the Western Balkans, Ukraine, and Moldova. In Sweden, the population is generally either indifferent or supportive. This contrasts with countries like Austria and Germany, where EU enlargement is a more contentious topic in the public arena.

Overall, these parties' stance on EU enlargement is underpinned by five main driving forces: **a. financial concerns**, **b. migration and security**, **c. foreign policy**, **d. popular support for enlargement and a strategy to win votes**, and **e. concerns over the functioning of the EU and the place/weight of their respective countries**.

▪ Financial concerns

Firstly, **these parties oppose the financial costs associated with the accession of economically less developed states**. The PVV, for example, centres its tough stance on a strongly "frugal" economic position, arguing that admitting poorer countries would place undue financial strain on the Netherlands and other net contributors. This argument is also cited by the French RN, Germany's AfD, the Swedish SD, and Austria's FPÖ. Notably, all of these parties come from countries that are already net contributors to the EU budget.

▪ Migration & security

Even though enlargement has not been particularly politicised in countries like the Netherlands, **it is intrinsically linked to migration and freedom of movement**. This issue is particularly sensitive to the Dutch public and is a key point in the PVV's agenda. In France, the RN links EU enlargement with the risk of increased illegal immigration and organised crime, thus aligning it with its domestic political agenda. Similarly, the AfD in Germany and FPÖ in Austria have consolidated their electoral base with their anti-migration agenda, which is focused on Muslim populations, and by citing the need for cultural preservation. In Austria, the FPÖ has opposed the accession of countries with significant Muslim populations, such as Bosnia and Herzegovina.

▪ Foreign policy

Furthermore, **foreign policy considerations and relations with Russia impact significantly on the stance certain radical right parties have taken to EU enlargement**, particularly regarding the potential accession of Ukraine and Moldova. The AfD, for example, maintains a more tolerant stance towards Russia and opposes the accession of countries like Ukraine and Moldova. Their anti-enlargement narrative includes concerns about importing ongoing conflicts into the EU, while denying any influence from the Kremlin. In contrast, Italy's ruling FdI party has a pro-Western, pro-NATO strategic orientation and is particularly critical of the Kremlin and its ongoing military campaign in Ukraine. By embracing a supportive stance towards Ukraine and maintaining Italy's pro-enlargement position, its leader, Giorgia Meloni, is seeking to legitimise her party on the international stage as a reliable partner in the eyes of Brussels and Washington. Similarly, the Sweden's SD have ramped up their anti-Russian rhetoric following Russia's invasion of Ukraine and have refrained from condemning the potential accession of Ukraine, despite their overall sceptical stance towards enlargement.

▪ Popular support for enlargement and a strategy to win votes

Public opinion and the domestic political landscape are key factors which influences these arguments and driving forces. In countries like Austria, Germany, and France, public opinion is largely against or sceptical of EU enlargement, which is associated with migration and employment issues. Despite this, the ruling coalitions in Austria and Germany maintain supportive stances towards enlargement, while parties like the FPÖ, AfD and RN capitalise on public scepticism to maximise their electoral gains. Demographics and the politics of the ethnic minority vote can also shape positions on enlargement. In Germany, the AfD strategically crafts its narrative to attract votes by focusing on issues that resonate with their potential target base, which includes Russian-Germans in states like Saxony. Additionally, the AfD is potentially targeting Croats and Serbs when it opposes the accession of Bosnia and Herzegovina. This tactic is not unique to Germany's AfD: in Austria, the FPÖ appeals to specific ethnic groups, such as the Serbs in Vienna, by promoting nationalistic sentiments such as "Kosovo is Serbia".

▪ Concerns over the functioning of the EU

Several of the parties in our study, including the RN, have tried to draw a parallel between a potential enlargement of the EU and the bloc's deepening. The latter could only come about through an institutional reform of the EU that could potentially include a shift towards QMV in areas like foreign policy—a move which Eurosceptic parties largely view in terms of EU capitals ceding their decision-making powers to Brussels, and thus of a potential loss of sovereignty. As

explained in the next section, this reasoning has implications not just for EU enlargement, but also for the bloc's broader policy direction in the years ahead.

Interestingly, this anti-enlargement argument represents a novel trend that contrasts with the historical stance of anti-federalist forces (e.g. the UK). As pointed out earlier in this study, such forces have traditionally supported enlargement as a way to dilute closer integration and deeper federalism within the EU. This emerging trend marks a paradox in the history of the EU, reflecting a shift in how pro- and anti-integration actors view enlargement—no longer merely as a tool to resist deeper integration, but potentially as a threat to sovereignty.

As it is evident from the above analysis, radical parties do not all share the five drivers for enlargement nor do they all place equal measure of significance to them. The following table summarises the positions of the parties examined and classifies the parties according to the relative strength in their domestic political scene:

Party	Coalition Status	Stance on EU Enlargement	Key Drivers / Rationale
AfD (Germany)	Opposition	Anti	Financial concerns: Opposes funding more net-recipient states Migration & security: Argues enlargement (esp. Western Balkans, Ukraine) brings organised crime & illegal immigration Foreign policy: Pro-Russia stance, opposes Ukraine's accession Electoral calculations: Sceptical electorate in Eastern Germany; appeals to Russian-Germans/Serb diaspora Concerns over EU functioning: Strongly against any deeper integration/ shift towards QMV
RN (France)	Opposition	Anti	Financial concerns: Opposes spending on "poorer" new members Migration & security: Highlights risk of increased illegal immigration and organised crime Electoral calculations: Capitalises on public scepticism about enlargement Concerns over EU functioning: Opposes potential shift to QMV, fears loss of sovereignty
FdI (Italy)	Leading partner in government coalition (under PM Meloni)	Pro	Migration & security: Ties support to migration control agreements Foreign policy: Pro-Western, critical of Russia, seeks to bolster international legitimacy Electoral calculations: Consolidates leadership within the right-wing coalition (Geo)economic interests: "Adriatic power" self-perception; trade & investment
VOX (Spain)	Opposition (occasionally a	Lukewarm/ambiguous	Low prioritisation: Enlargement is not a core issue; lacks a coherent public

	partner in regional coalition governments)		stance Foreign policy: Some MEP vote against Ukraine/Moldova talks, but no explicit overarching position Electoral calculations: Domestic issues (migration, cost of living) take precedence; enlargement seldom featured in campaigns
PVV (Netherlands)	Junior partner in government coalition	Anti	Financial concerns: "Frugal" arguments against poorer net-recipient countries Migration & security: Strongly anti-immigration; sees free movement as a threat Foreign policy: Opposes Ukraine's accession; lumps it with general anti-enlargement stance Electoral calculations: Segments of Dutch public sceptical about migration and added budgetary burdens
SD (Sweden)	Support to a minority government	Lukewarm/ambiguous	Financial concerns: Prefers net-paying countries, wary of net recipients Migration & security: Doubts new members' capacity to control borders effectively Foreign policy: Recently pro-NATO, critical of Russia, but not pressing for further enlargement Electoral calculations: Enlargement not a major vote driver for SD Concerns over EU functioning: Questions EU's capacity to absorb more states
FPO (Austria)	Likely to lead next government coalition	Anti (Selective openness towards Serbia and Montenegro)	Financial concerns: Austria is a net contributor; wary of straining EU budget Migration & security: Strong anti-immigration platform Foreign policy: Orbán-friendly, criticises admitting "a country at war" (Ukraine)
			Electoral calculations: Majority of Austrians are sceptical; FPÖ capitalises on that sentiment Concerns over EU functioning: Questions deeper integration

Eurosceptic radical right parties across Europe have begun emulating Viktor Orbán's model to increase their chances of assuming power. Notably, compared to previous decades, these radical right-wing Eurosceptic parties are increasingly engaging in the EU public debate, aiming to set their terms and shape policies in various areas. Rather than being purely reactive, they now actively participate in discussions, particularly on migration and climate issues, reflecting a strategic shift towards influencing EU policies from within. This approach has recently helped parties of this sort to become part of government coalitions, most notably the PVV in the Netherlands.

Against this backdrop, enlargement could be used as a bargaining chip in future negotiations, with Eurosceptic parties potentially leveraging the issue to extract concessions or delay deeper integration measures. Current support from parties like the Sweden Democrats is ambiguous and largely conditional. However, far- right and radical right parties emphasise national sovereignty and resist transferring more decision-making power to Brussels. As the enlargement process advances, their positions may shift, likely to opposing measures such as extending QMV and treaty changes.

For years, Hungary under Orbán has made effective use of EU processes (e.g. unanimity in enlargement talks) to extract unrelated concessions in other areas of perceived national interest. The practice of seeking unanimity at every stage of the enlargement process allows countries like Hungary to use it as a bargaining tool. Under the FdI, Italy could in the future follow that path. As shown above, unlike other like-minded Eurosceptic parties, which resist further enlargement, the FdI views the ongoing accession process as a means to bolster Italy's influence both within the EU and the candidate states themselves. Meloni's government has already partly used its support for EU enlargement as a tool for striking migration-related deals, such as outsourcing border management to non-EU Albania. Keeping accession candidates in the "waiting room" could be seen as beneficial for striking deals that push migration management responsibilities onto those countries, especially given the political sensitivity of managing migration and its prominence on the agendas of these radical right parties.

Although there has been no decisive alteration in the balance of power at the European Parliament level, where a pro-EU coalition of mainstream parties maintains a fragile majority, radical right wing parties across Europe have been gaining traction. More significantly, their rise at the national level and involvement in governmental coalitions affects the composition and dynamics of both the European Council and the Council of Ministers, crucial bodies both when it comes to setting high-level policy agendas and adopting EU laws. As EU enlargement largely hinges on political will, it is the Council that ultimately has the determining role.

Public support for EU enlargement is notably lower in Western EU member states where radical right parties hold sway, including France, Austria, and the Netherlands. **The inclusion of far-right parties in national coalitions, such as Wilders' PVV in the Netherlands, may amplify scepticism towards enlargement among mainstream ruling parties.** This could lead to stricter EU enlargement criteria, potentially hampering the accession of certain candidate states, and especially those with significant Muslim populations, and imposing more obstacles for candidate states. **Hence, decision-making on EU enlargement could be influenced by the surge of radical right parties, especially as they join governmental coalitions or act as leading opposition forces.**

Despite softening their rhetoric, most radical right parties in Western Europe remain fundamentally Eurosceptic or anti-EU, opposing the expansion of a Union they criticise. This has significant implications for the future of EU enlargement. While some parties, like Italy's FdI, support enlargement, the majority remain either sceptical or against.

The strategy implemented by the UK for decades sought to leverage horizontal expansion to counter deeper integration, preventing steps towards federalism. In recent years, Orbán, another staunch anti-federalist, has favoured EU enlargement, at least with regard to the Western Balkans, a region where he has cultivated strong ties with local leaders. Having like-minded leaders like Vucic, the Serbian President, in the European Council would enable a "blocking minority" capable of further hindering EU reforms and promoting a "Europe of nation-states". To a certain extent, the FdI's own position in favour of enlargement could be seen in this light, given its focus on nativism and national sovereignty, along with its own commercial, investment, and security interests in several candidate states, primarily in the Western Balkans.

The emphasis radical right parties place on national sovereignty makes them wary of transferring more decision-making power to Brussels and strongly resistant to measures like the introduction of QMV and/or treaty changes. Further

enlargement would potentially lead to a Union with over 30 member states; inevitably, this raises questions regarding the governability and efficiency of an already often dysfunctional decision-making structure.¹¹⁹ As mentioned above, internal EU reforms of the sort championed by President Macron in France and the German "traffic lights" coalition are viewed as essential for the effective integration of new members. Most of the internal reforms (e.g. QMV, reforming CAP and the MFF) championed by the French-German expert report on EU institutional reform would expand EU's competences in various policy areas. However, the growing influence of radical right parties could further stall these reform efforts, which have already been challenged by mainstream parties in smaller member states.

According to a paper produced by the secretariat of the EU Council and leaked to the *Financial Times* in September 2023, the accession of nine more member states could end up costing existing member states over €256 billion, while all member states would have to contribute more to the EU regular budget and receive less from it. It also acknowledged that several existing member states would turn from net recipients to net contributors. As the largest country in the group of nine candidate member states, Ukraine could be entitled to up to €186 billion over the seven years covered by the EU's long-term budget (MFF), with nearly half the funds directed at agriculture, according to the same paper. However, these economic estimates remain provisional and are subject to potential revisions based on factors such as negotiations, shifts in EU priorities, or updated financial assessments.¹²⁰ Furthermore, by placing too much focus on the narrow budgetary aspects of enlargement, the discussion largely overlooks the economic, political and/or strategic costs of non-enlargement.¹²¹ Regardless of whether such estimates are precise or tend to omit potential counter-benefits for existing member states, they could be used by Eurosceptic and populist forces to resist further enlargement on economic grounds, as certain parties in our case studies have already done.

If enlargement becomes a more tangible prospect, the opposition from these radical right parties is likely to intensify. The CAP has been a particularly sensitive area in EU policy, and especially vulnerable to misinformation and politicisation. Russian disinformation campaigns, for instance, have sought to create concerns about Ukraine's future EU membership by sowing doubt over its impact on European agriculture; focusing on the CAP, they have amplified misconceptions.¹²² Eurosceptic parties in Western Europe have then echoed these arguments, focusing on the risks to their agricultural sectors and linking enlargement with broader budgetary concerns. Faced with political pressure from their populations, more enlargement-friendly parties from the "political centre" would be tempted to adjust their agenda accordingly. Again, this is a trend we have seen in other areas of policy in recent years (e.g. migration).

Against this backdrop, a country worth keeping an eye on next year is Czechia. Although it has been a net recipient since its accession to the EU in 2004, it is likely to transition to a net contributor to the EU budget in the next MFF. The country is also poised to hold parliamentary elections during the second half of 2025, with the radical right ANO 2011 (which is also a member of the PöE in the European Parliament) is currently leading the polls and could join the future government coalition. As this study has shown, the PVV in the Netherlands provides the most recent example of a radical right party influencing a ruling coalition to harden its stance on EU enlargement.

Any major decisions impacting the functioning of the EU, including enlargement, still require unanimous agreement from all member states following primarily bargaining between member states. In many cases, certain countries are likely to hold national referenda before beginning any ratification process on expansion. For example, in France, it has been constitutionally required since 2005 that any further accession must be approved by a referendum or a three fifths majority in both the French Senate and the National Assembly.¹²³ Even though it is not constitutionally mandatory for enlargement, Austria has the legal framework in place to hold referenda on issues of significant national interest. While there is no such constitutional provision in either the Netherlands or Sweden, Eurosceptic and anti-enlargement parties could apply political pressure for future referenda on the potential accession of new member states, especially as their electoral sway increases. Such referenda could also provide these forces with fertile ground to exaggerate the perceived risks and costs of EU enlargement.

A recent survey conducted across all 27 EU member states by Leuven-based Ipsos on behalf of the Wilfried Martens Centre for European Studies revealed that a substantial majority of EU citizens (65%) support having a direct vote on which candidate states could be allowed to join the bloc. However, this does not necessarily equate to a pro-enlargement stance; rather, it could also serve as a tool for Eurosceptic groups to potentially block any further expansion of the Union.¹²⁴ All the above indicate that enlargement is poised for further politicisation in the years ahead, potentially even in member states where it has yet to feature in the national political dialogue.

The Trump Factor

Finally, even though this study has largely focused on internal EU dynamics and the rise of radical right parties dictating much of the enlargement discourse, it is important to note that external geopolitical trends, particularly potential seismic shifts in US foreign policy, could exacerbate the complexity surrounding EU enlargement. Donald Trump's return to office could have ramifications for the enlargement process on various levels. For example, a second Trump administration is highly likely to take a more transactional approach to transatlantic relations, exacerbating US-EU disagreements over NATO funding, trade issues, and the role of multilateral organisations. This might encourage Eurosceptic and nationalist leaders in both EU member and candidate states, providing them with a justification for undermining Brussels' authority and delaying the institutional reforms required for successful enlargement.

Local nationalist leaders in Western Balkan states, such as Serbia's Aleksandar Vucic or Milorad Dodik, the President of the Republika Srpska, could feel empowered to pursue more assertive policies driven by nationalist, secessionist or expansionist agendas. This might include delaying reforms necessary for EU accession or intensifying nationalist rhetoric that deepens internal divisions and heightens regional tensions. Encouraged by Trump's transactional approach, candidate states may de-prioritise reforms in governance, the Rule of Law, and democratic standards. Leaders might view alignment with US interests as a counterbalance to EU conditionality, reducing incentives to adhere to stringent EU criteria.

Ukraine and Moldova's EU accession pathways are heavily reliant on Western unity, and the US-EU partnership in particular, being sustained. A Trump administration potentially less supportive of Ukraine in its war with Russia and more focused on bilateral deals could weaken EU confidence in the long-term security framework needed to integrate these states. Radical right parties in member states could exploit Trump's reduced commitment to Ukraine to argue against EU enlargement in favour of Realpolitik. They might frame Ukraine and Moldova's accession as a financial burden and a security risk, reinforcing their opposition to expansion.

The European public, influenced by radical right narratives, might question the feasibility of integrating Ukraine and Moldova due to the high economic and political costs associated with their accession. Radical right parties in member states could exploit a Trump-aligned geopolitical environment to enhance their domestic and European credibility. By associating themselves with Trump's nationalist rhetoric and policies, they could appeal to voters disillusioned with traditional pro-EU parties.

Alternatively, the increased prominence of Eurosceptic rhetoric could deepen divisions within the EU. Radical right parties in member states could align their agendas with nationalist Western Balkan leaders, potentially lobbying for weaker EU oversight of accession criteria. Simultaneously, such shifts may decrease the EU's clout over aspiring states, hampering efforts to bring them into line with the Union's democratic, legal, and economic criteria. This could prompt Brussels to emphasise short-term geopolitical stability over the EU's normative commitments to democracy and the Rule of Law. In this scenario, the threat of a less cohesive EU reacting to external forces may accelerate the politicisation of enlargement.

The growing influence of Eurosceptic parties emboldened by external geopolitical shifts could also obstruct necessary institutional reforms within the EU. Without such reforms or revising budget contributions, enlargement would face additional politically sensitive obstacles, further delaying integration.

The Path Forward

Overall, the impact of radical right parties at the national level, particularly in the European Council and the Council of Ministers, can significantly shape high-level policy decisions, including those related to enlargement. The rise of these parties presents a significant challenge, as enlargement intersects with other critical issues such as migration, the CAP and cohesion policy, all of which are particularly sensitive to their voter base and have substantial budgetary implications for the EU. These parties are therefore likely to oppose the necessary reforms and deeper integration associated with enlargement. Additionally, more mainstream parties with an official pro-enlargement stance might be tempted to follow suit to avoid losing votes to these radical right parties.

As these parties continue to influence both national and European politics, monitoring their impact on EU policy and the broader European project will be crucial. Balancing enlargement with internal reform will remain a challenge. This evolving political landscape will test the EU's ability to balance expansion against the required institutional reforms, potentially making enlargement a more contentious and politicised issue in the coming years. The interplay between internal EU dynamics, external pressures, and the growing influence of Eurosceptic forces is poised to shape the trajectory of enlargement in increasingly complex and contested ways.

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The Journey of Albania's Justice Reform: Progress Amidst Ongoing Implementation Challenges

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Executive Summary

The Albanian justice system has long been plagued by corruption and a negative reputation, stemming from its misuse under the Communist regime and subsequent political manipulation during the transition period towards democracy. Despite ongoing reforms, public trust remains low, with judicial professionals perceived as highly corrupt.

To advance its EU membership, Albania undertook critical judicial reforms supported by international partners, and in particular by the EU and the US. Key measures included constitutional amendments, the creation of oversight bodies, anti-corruption initiatives, and enhanced judicial independence. These efforts aimed to establish a more transparent, efficient, and accountable justice system, laying the groundwork for Albania's EU integration.

Following the granting of EU candidate status to Albania in 2014, the Assembly of Albania established a Special Parliamentary Commission for Reform in the Justice System to address fundamental issues within the judiciary. The commission's objectives included analyzing the current state of the justice system, drafting strategic reform documents, and proposing necessary constitutional and legal changes.

On July 22, 2016, Albania's constitutional reform was unanimously approved by 140 MPs, despite initial criticisms and political pressures. The reform aimed to overhaul the justice system through seven key pillars: constitutional justice, judicial power, criminal justice, legal education, legal services, anti-corruption measures, and system funding and infrastructure. It involved changes to the Constitution and the passing of over 25 laws. The reform adopted a two-fold approach: restructuring the justice system for better functionality and implementing a rigorous vetting process for judges and prosecutors to ensure integrity and competence. This dual strategy sought to establish a more efficient, transparent, and trustworthy judicial system.

The judicial reforms introduced a comprehensive vetting process for judges and prosecutors, established by Law no. 84/2016. This process, known as "the vetting process," is central to the reform, aiming to evaluate the legality of the assets held by prospective judges and prosecutors, their professional standing, and any potential links they may have to organized crime. The vetting process is monitored by international observers to ensure independence. It evaluates candidates on the basis of specific criteria.

Despite broad political consensus, the creation of new justice institutions and vetting bodies was delayed. The vetting process, a significant element of the reform, revealed extensive corruption and led to the removal or resignation of more judges and prosecutors than anticipated. This created administrative backlogs as well as further scepticism among citizens. In 2023, Albania introduced a new judicial organogram, reducing first-instance courts from 29 to 12 in number and consolidating the various appeals courts into a single institution in Tirana. This reform sought to address the human resources vacuum caused by the vetting process, but faced significant challenges in implementation. While some regions saw efficiencies improve, others struggled with delays and increased travel burdens. The vetting process for judges has faced challenges, with some judges passing despite being unable to justify their wealth and, in other cases, being dismissed and reinstated after winning their case at the European Court of Human Rights (Sevdari case). This issue stems from inconsistencies in vetting criteria and difficulties in verifying asset declarations.

The Special Anti-Corruption and Organized Crime Structure (SPAK), established in 2019, is a key component of Albania's judicial reform, targeting high-level corruption and organized crime. SPAK has successfully prosecuted several high-profile cases, demonstrating its commitment to accountability. Prior to SPAK, no senior-level convictions had been recorded, despite numerous high-profile cases. While SPAK has made notable strides in prosecuting high-profile cases, the varying outcomes underscore the complexities and challenges of judicial reform in Albania. SPAK's prosecutions have enjoyed mixed success, reflecting both significant achievements and ongoing challenges.

Critics argue that SPAK is politically biased, selectively targeting opposition figures while allegedly protecting others aligned with the government. Observers have noted that SPAK's progress in handling certain high-profile cases has been slower than expected, leading to public frustration and impatience for swift justice. Additionally, SPAK faces challenges related to limited financial and human resources which affect its ability to conduct thorough and timely investigations. But despite facing criticism regarding its political impartiality, the institution has garnered substantial support from both the Albanian public and the international community. This backing is pivotal in navigating Albania's complex political landscape and fostering meaningful judicial reforms.

Several international organizations have evaluated SPAK's work positively, and the institution has earned significant public trust. Surveys indicate that SPAK is the most trusted Albanian institution; a majority of Albanians view corruption as a serious problem that SPAK can operate without political influence. However, the Albanian public's trust in SPAK is largely due to the oversight of international bodies including the US Embassy and the EU Delegation, rather than a restored faith in local judges and prosecutors.

Albania's progress in the Rule of Law sector has been closely monitored by the European Union, as it is crucial for the country's EU accession. The European Commission's (EC) progress reports from 2021 to 2024 highlight that Albania is moderately prepared in its judiciary's functioning, with no significant change in its overall assessment. While advances have been made in the vetting process, the 2023 report raised concerns about its quality. Reports from 2021 to 2024 emphasize the need for better coordination among judicial institutions and highlight a lack of suitable human resources, which impacts the effectiveness of specialized bodies.

Persistent issues such as unfilled vacancies, lengthy proceedings, and a backlog of cases continue to affect the judiciary's effectiveness.

Despite these challenges, Albania has made progress, leading to the initiation of talks on the "fundamentals" cluster for EU accession, a significant step which has been hailed by some as confirmation of progress, though others view it as a political move by the EU to address integration fatigue rather than a reflection of genuine progress.

Albania has taken steps forward in the field of justice, but it has a long way to go to achieve its ultimate goal of creating a judicial system that is fully independent and trusted by its citizens. This remains the biggest challenge for both the judiciary and the political leadership.

At the moment, with the opening of EU accession negotiations for Cluster 1, there is significant momentum to further advance the ongoing judicial reform and its implementation, addressing deficiencies and challenges. It is up to the Albanian leadership to seize this momentum, ensuring the judicial reform becomes an exemplary process that encourages others, positioning Albania as a leader in this critical endeavor.

Background

In the contemporary period of the Albanian state, the justice system has created a negative reputation for itself. This is because, under the Hoxha regime, 'popular justice' was used as a 'stick' with which to hit political opponents, while after the fall of the regime, it was used by politicians to ensure their impunity. Paradoxically, instead of fighting corruption, the justice system ended up becoming the symbol par excellence of it. Judges and prosecutors with expensive watches and bags, totally immersed in corruption, are still fresh in Albanians' memories. Despite the current efforts to reform and cleanse the system, the legacy of corruption and impunity among justice professionals remains a stark reminder of the challenges that lie ahead, which include deeply eroded public trust. According to a survey carried out by the Institute for Development Research and Alternatives (IDRA)¹ in 2016, Albanian citizens perceived corruption to be widespread across different institutions, with judges and prosecutors considered the second most corrupt group (76 points out of 100 where 0 = not at all corrupt and 100 = very corrupt), ranking just below custom officers (77 points). The situation has not changed significantly 8 years on. The "Trust in Governance 2023" opinion poll highlights that the courts and prosecution service are among the least trusted institutions, with 33.4% and 33.7% of participants respectively expressing distrust.²

The prospect of Albania's European membership has pushed the country to undertake transformative reforms in the creation of new institutions, adapting to EU standards. The European Commission recommended in October 2013 that the Council grant Albania the status of a candidate country. To open membership negotiations, the Commission found that Albania must fulfil the key priorities related to:

(a) public administration and judicial reform (with a focus on professionalism and depoliticization); (b) the fight against corruption and organized crime; and (c) strengthening the protection of human rights, including property rights. The European Parliament requested that these priorities be addressed, and the progress achieved to date consolidated.³ In June 2014, the European Council granted Albania the status of a candidate country. From the domestic perspective, since the autumn of 2013, Albania has a left-wing government led by the leader of the Socialist Party, Edi Rama, and the reformation of the 'rotten justice' system has been part of the program.

This thematic brief closely examines the judicial reform undertaken by the Albanian government, which consists of four distinct thematic elements. The first highlights the needs and shortcomings that necessitated the reform, providing an overview of the most critical stages of the process. The second analyzes the outcomes of the reform, with a special emphasis on its two main pillars. The third addresses the problematic aspects of the implementation phase, assessing the vetting process and the work of SPAK. The fourth and final element offers an overview of the findings from the European Commission's progress reports on Albania for the years 2021, 2022, 2023 and 2024 providing an assessment of its performance with regard to Chapter 23 through a year-over-year comparison.

Part 1 - The Starting Point and the Initial Phases of the Judicial Reform

1.1. Needs Assessment of the Judicial Reform

As pointed out by several international institutions that assess the Rule of Law and fundamental freedoms around the world, Albania has long suffered from endemic corruption within its judicial system. Although the independence and impartiality of the judicial system was protected in Albanian legislation, in practice it was highly politicized and failed to fight corruption and organized crime. Regarding the institutions of justice, there was no structured vetting process in place to ensure judges were not linked to corruption. The courts were also marked by poor levels of professionalism, with judges only receiving six months of training.

In 2013, Albania was ranked 116th out of 176 countries on the Transparency International Corruption Perception Index⁴, making it the worst performer in the Western Balkan region for a third consecutive year. The same year, the Corruption Perceptions Index ranked Albania as one of the most corrupt countries in Europe. Areas of particular concern were party financing, de facto impunity for high-level officials, undue influence exerted by private business interests over political decision-making, and the prejudiced application of the Rule of Law by an ineffective judiciary.

According to the Council of Europe Commissioner for Human Rights on Albania⁵, "the high level of corruption in the judiciary seriously hinders the proper functioning of the judiciary and destroys public trust in justice and the Rule of Law in Albania". While according to the assessment of the Group of States against Corruption (GRECO)⁶, "the justice system in Albania suffers especially from: (i) the low level of public trust; (ii) its weak position vis-a-vis other powers; (iii) lack of control over the selection of High Court judges; (iv) the exclusivity of the Minister of Justice to initiate the initiation of disciplinary proceedings against judges of first instance and of appeal; (v) the inactivity of the National Judicial Conference, which has had a negative impact on selection, career progression, training as well as disciplinary proceedings against judges".

According to the European Commission report of 2014⁷, "the functioning of the judicial system continues to be affected by politicization, limited accountability, poor interinstitutional cooperation, insufficient resources and backlogs". Furthermore, it suggests that "Albania needs to vigorously pursue judicial reform with the constructive cooperation of all stakeholders and through continued engagement with the Venice Commission, including on the new judicial reform strategy for 2014-20 which is being prepared, and a comprehensive review of the applicable legislative framework".

Several international institutions highlighted the then severe situation of the Albanian justice system, sounding the alarm for Tirana to take necessary measures for its reform. If Albania wanted to advance its EU membership process, reform of the justice system was a must and international partners, led by the EU and the US, strongly supported it politically, technically and financially.

The next section presents an overview of the steps Albania took to reach the point at which it could embark on its judicial reform. This journey involved a series of critical measures, including the establishment of a comprehensive legal framework, the implementation of anti-corruption initiatives, and the enhancement of judicial independence. Key milestones included the creation of the Special Parliamentary Commission, the adoption of constitutional amendments, the creation of new oversight bodies, and collaboration with international organizations to ensure alignment with European standards. These efforts laid the groundwork for a more transparent, efficient, and accountable justice system in Albania.

1.2. The Special Parliamentary Commission & The Internationalization of the Process

In Albania, where public opinion is massively in favour of EU membership, the bloc was able to use the transformative power of 'conditionality' to set in motion the justice reform that was a prerequisite for the integration process. Of course, the EU also supported it with financial aid and expertise. From the Albanian perspective, unburdened by incumbency the then PS-LSI coalition government of 2013-2017, the "Alliance for European Albania" led by Edi Rama as Prime Minister,

pursued more daring structural reforms in key areas including justice, education, health, governance, pensions and public administration. The government program was guided by the vision of "an Albanian Renaissance" and by its mission "to move faster to build the Albania of the Next Generation"⁸

Following the granting of EU candidate status to Albania in 2014 and the need to undertake fundamental reforms which this entailed, the Assembly of Albania, by dint of Decision No. 96/2014, established a Special Parliamentary Commission for Reform in the Justice System charged with analyzing the current situation in the justice system, defining the objectives of the justice reform, and proposing necessary constitutional and legal changes.

More specifically, the Commission's objectives included:

- **Analyzing the state of the organization and the operation of the justice system**, with the aim of highlighting problems and areas in need of improvement, in cooperation with the Ministry of Justice and through comprehensive discussions with the institutions of the justice system, local and international experts, other interested parties, and the public.
- **Drafting a strategic document on the objectives of justice system reform**, based on its analysis of the state of the organization and operation of the justice system.
- **Proposing for approval a complete raft of draft laws required for the reform of the legislation** regulating the organization and functioning of the institutions of the justice system.

As we wrote above, in addition to the political and financial support the EU provided for the justice reform, its involvement through the Group of High-Level Experts "played a pro-active role in all the stages of the reform: preparing the analysis, drafting the strategy, drafting the legal changes and reforms' implementation"; this was considered by academics to be an "internationalization of the reform in justice"⁹. Of the 24 high-level experts, eight were from international organizations: the EU Euralius Mission, the US OPDAT mission, the Council of Europe (Venice Commission), or the OSCE-ODHIR mission.

Following an invitation from the Special Commission for collaborators, the Public Consultation Network of Professionals at the Special Commission was created. This consisted of about 1900 people¹⁰, who included representatives from non-profit organizations, courts and prosecutors' offices at all three levels, lawyers, professors from the Faculties of Law and School of Magistracy, and experts engaged in research in the field of justice. For each pillar of the justice reform, each of the groups charged with drafting the most important organic draft laws of the justice system was supported closely by a consultation group made up of judges, prosecutors, public notaries, lawyers, officers of the judicial police, lawyers, et al.

Albania's international partners—including the Ambassador of the EU Delegation, the Ambassador of the USA, the Ambassador of the OSCE Presence, the ambassadors of the European Union countries, the UNICEF Office in Albania and the US Deputy Secretary of State—participated in every public consultation activity and provided support for the reform process while stressing its necessity. The involvement of international partners from the beginning of the reform process was key to the progress made. Their participation has added credibility to the entire process and been a key factor in garnering political support and the trust of citizens. International partnerships have been instrumental in ensuring the reform's transparency and effectiveness, thereby strengthening public confidence in the process as a whole.

1.3. The Three Phases of the Special Commission's Work

In June 2015, the Group of High-Level Experts presented the analytical document. Structured in ten chapters, the analytical document identified the following problems in the judicial system: i) a high level of corruption; ii) a lack of independence and transparency; iii) a lack of professionalism; iv) a lack of efficiency; and v) a lack of public trust in the judicial system.

By dint of Decision No. 14, dated 30.07.2015, the Commission approved the "Analysis of the Justice System in Albania"¹¹, a document which concluded the **1st phase** of the process and is the first widely consulted document which analyzed the current state of the justice system, and the problems that had affected it in terms of its organization, operation, good governance, efficiency and administration, objectively, scientifically and professionally and from the legal point of view vis-a-vis the applicability of the law.

The Special Commission, by dint of Decision No. 15, dated 30.07.2015¹², approved in principle both the "Strategy of Reform in the Justice System"¹³ and the **action plan** for developing the strategy for reforming the justice system. These two documents, which concluded the **2nd phase** of the process, broke down the strategic objectives of the reform of the

justice system into concrete measures, while also identifying the laws that would become subject to intervention in the 3rd phase of the Special Commission's activities.

In the 3rd phase, the Group of High-Level Experts (domestic and international) began work on the draft law entitled "On some additions and amendments to the Constitution of Albania". Based on a request made by the High-Level Expert Group for the Venice Commission to provide its opinion on the draft law, the Special Commission decided to submit the request for its opinion on the draft law on additions and changes to the Constitution of the Republic of Albania to the Venice Commission (VC) (along with an official request from the Assembly).¹⁴

On 11-12 March, 2015, the Venice Commission approved its final opinion on the revised text of the draft constitutional amendments drawn up by the Group of High-Level Experts, which then reflected on the changes and presented its reflections, along with the comments and proposals made by the members of the Commission, to the Special Parliamentary Committee.

At the meeting of June 14, 2016, the Special Commission approved article by article and in its entirety the draft law "On some additions and amendments to the law no. 8417, dated 21.10.1998, 'Constitution of the Republic of Albania'", though it retained the right to reflect on the provisions of the Parliament. The Commission played a very important role in drafting justice reform, as it was located in Parliament and thus imbued a comprehensive and democratic legitimacy on the process, since it also involved the opposition. The Commission also included all the relevant institutions in its consultations—-independent bodies as well as others in academia, civil society and the media—thereby stimulating a broad and wide- ranging debate on the reform. Later, we will see that this synergy was lost during the implementation phase, when the political support was not as all-encompassing.



The three phases of the Special Commission's work

Part 2 - The Two Main Pillars of Albania's Judicial Reform

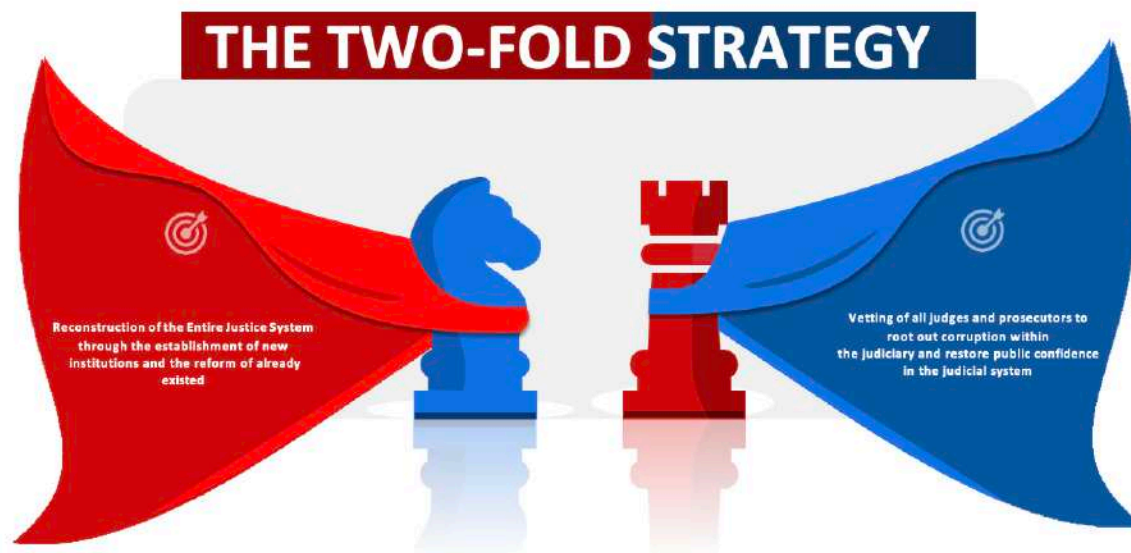
2.1. The Outcomes of the Judicial Reform

The constitutional reform was approved unanimously by all 140 MPs on 22 July 2016, enjoying the support of MPs who were de facto critical of it and were later the subject of investigations by the reformed institutions of justice. Despite voting in favour in Parliament, many MPs were critical of the design of the reform. However, given the international pressure—the ambassadors of the EU and US sat in parliament during the Parliamentary debate to demonstrate their support—voting against would have been viewed as taking a stance against Albania's main strategic allies.

The debate on reform saw the Democratic Party (DP) consistently blocking progress due to its failure to strike a bargain with the Socialist Party (SP). The SP claimed foreign control over the reform to justify its inability to respond to the

demands of the Democrats. The DP's non-engagement allowed the SP to take sole credit for the reform, presenting it as a key political achievement, while opposition parties argued that the SP has exploited the reform for its own political gain. Citizens broadly welcomed the reform, though they initially treated it with scepticism, given their prior experiences.

The reform was conceived of over 7 pillars:¹⁵ the justice system under the Constitution and the Constitutional Court, judicial power, criminal justice, legal education, legal services, measures in the fight against corruption, and funding and infrastructural support of the system. The reform made changes to the Constitution and more than 25 laws.



The two-fold approach to judicial reform in Albania

Judicial reform in Albania followed a two-fold approach. On one hand, it rebuilt the entire justice system, implementing comprehensive changes to improve its structure and functionality. On the other, it introduced a rigorous vetting process for all judges and prosecutors, designed to ensure that only those with integrity and competence remained in their positions. This dual strategy sought to create a more efficient, transparent and trustworthy judicial system.

2.2. The New and Reformed Justice Institutions

Transparency and merit-based criteria for the recruitment, appointment, transfer, promotion, and dismissal of judges were insufficient and piecemeal. For example, the professional evaluation and career of judges appointed to the courts of first instance and appeal courts fell under the High Council of Justice (KLD), while Supreme Court judges were not subject to a performance evaluation.¹⁶ To address these issues, the reform modified the functioning of each key institution to ensure their independence and the integrity of their members. Before the reform, the election of high officials to the judiciary and the position of general prosecutor was highly politicized. The reform changed that by enabling independent institutions to take charge of appointments. The reform had a substantial impact both on the role and functioning of the existing bodies and through the creation of new bodies.¹⁷

The Reformed Institutions:

- **High Judicial Council (HJC) and High Prosecutorial Council (HPC)** - The judicial reform significantly enhanced the roles and functions of the HJC and HPC. In addition, these reforms aimed to ensure the independence and accountability of the judiciary and prosecution. The HJC and HPC were granted greater authority over the appointment, evaluation and disciplining of judges and prosecutors, thereby reducing political interference and promoting merit-based selections. Additionally, new measures were introduced to improve transparency and efficiency within these councils, aligning their operations with European standards and best practices.
- **The High Court (HC) and Constitutional Court (CC)** - The reform updated the rules and criteria for the selection of candidates for HC and CC judges, shifting the competence from Parliament to the President, acting on recommendations made by the HJC. In the case of the High Court, the reform aimed to streamline its operations by amending constitutional provisions in order to limit its jurisdiction and reduce the backlog of cases. This included depriving the High Court of initial jurisdiction in certain cases and restricting the right to file appeals. The

Constitutional Court was restructured to ensure greater independence and efficiency. This involved revising the appointment process for judges in order to reduce political influence and enhance the court's ability to uphold constitutional principles effectively.

- **The School of Magistrates** - The reforms have significantly enhanced the role and responsibilities of the School of Magistrates. New categories of training have been introduced, including initial training for chancellors and continuing education for court administration staff and legal advisors. This expansion sought to ensure that all members of the judiciary were well-trained in and continuously updated on legal standards and practices. Additionally, the School of Magistrates became the sole gateway for lawyers who aspired to join the judiciary, ensuring a standardized and rigorous selection process.¹⁸ These changes were crucial in building a more competent and professional judicial system.

The Newly-established Justice Institutions:

- **The High Inspector of Justice (ILD)** - The post was established to oversee the conduct of judges and prosecutors, ensuring accountability and integrity within the judiciary. The ILD is responsible for investigating complaints and disciplinary violations, maintaining a balance between public interest and judicial independence. This role is crucial in promoting transparency and trust in the judicial system.
- **The Justice Appointment Council (JAC)** - The Council was created to ensure a merit-based and transparent process for appointing judges and prosecutors. The Council evaluates candidates for judicial positions, including those for the High Court and Constitutional Court, and makes recommendations based on the candidates' qualifications and integrity. The process aims to reduce political influence and enhance the professionalism of the judiciary.
- **The Special Anti-Corruption and Organized Crime Structure (SPAK)** - In many ways, the SPAK was the **cornerstone of the new and reformed justice institutions**. It was formed primarily to create a structure independent of external influence from criminal and political groups. SPAK replaced the previous system in which corruption cases were dealt with by the ordinary courts. The reforms created three organs that specialize in organized crime and corruption: the Special Prosecution Office (SPAK), the National Bureau of Investigation (NBI)—whose focus is on prosecuting and investigating criminal corruption and organized crime and bringing criminal charges against high-ranking state officials—, and the Special Anti-corruption and Organized Crime Courts (first-instance and Appeal Courts, GJKKO), where these crimes are tried. The structure came into operation in 2019 and has since played a crucial role in Albania's efforts to align with European standards and combat systemic corruption.
- The reforms included creating special vetting bodies (Law no. 84/2016 "On the transitional re-evaluation of judges and prosecutors in the Republic of Albania") to screen all judges and prosecutors and evaluate potential links to corruption. As it is popularly known by the public, "the vetting process" is something entirely new introduced in the context of the reforms. The process includes examining the legality of justice professionals' assets, their professional standing, and any possible connections they may have to organized crime.
- The purpose of this law was to define special rules for re-evaluating all judges and prosecutors in the context of a process that assesses their professional training and moral integrity while verifying the legal source of their assets and discovering possible connections with, or influences from, organized crime and corruption. The institutions that carry out the re-evaluation process were newly-created:
 - The Independent Qualification Commission - IQC (which makes the initial decision);
 - The Special Appeal Chamber - SAC (which takes the final decision in case of appeal);
 - The Public Commissioners (who represents the public interest before the Special Chamber).

The IQC was organized into four trial panels composed of three members each, assigned by lots, while the SAC is composed of five judges. To ensure the full independence of the vetting process, a team of international observers, composed of experienced judges and prosecutors selected by different EU member states in the context of an **International Monitoring Operation (IMO)**¹⁹, was established in Tirana with the aim of monitoring and overseeing the entire vetting process.

The Constitution and the law provide that **the revaluation would be carried out based on three criteria:**

1. **Assessment of Wealth/Assets** - All judges and prosecutors were obliged to submit a declaration of their wealth along with documents proving the authenticity of the declaration and the legality of the sources from which the wealth stems, to the High Inspectorate of Declaration and Control of Assets and Conflict of Interest. The property control was also carried out on spouses, cohabitants and adult children, as well as any other person mentioned on the family certificate of the subject of the re-evaluation. The High Inspectorate of Declaration and Control of Assets and Conflict of Interests (ILDKPKI) was obliged to check these declarations.
2. **Image Control** - The reassessment institutions and the Classified Information Security Directorate (Intelligence Service body) were obliged to verify whether the subject has inappropriate contacts with persons involved or suspected of involvement in organized crime.
3. **Evaluation of Professional Ability** - This criterion concerns the evaluation of the professional and ethical abilities of the subject of the reassessment over the last 3 years, based on the decisions given and evaluations received by the relevant bodies.

There are three possible outcomes of this assessment:

- a) **Skills** - The judge/prosecutor has shown acceptable qualities at work, fair judgement, has respected the rights of subjects involved in judicial processes, is effective and efficient at work.
- b) **Shortcomings** - The judge/prosecutor has shown unacceptable work quality, poor judgement, did not respect the rights of the parties, and is not effective. It is recommended that they follow a new training program for up to one year at the School of Magistrates
- c) **Unsuitable** - The judge/prosecutor has shown unacceptable work quality, poor judgement, did not respect the rights of the parties, and is not effective. Following a training program of up to one year at the School of Magistrates cannot bring them up to the required level. In this case, the subject is dismissed from the position of judge or prosecutor and cannot reapply for a position within the system for a period of 15 years.

The law has given the public an important role to play in this process of re-evaluating judges and prosecutors, both as participants and by denouncing corruption. On the basis of Law no. 84/2016 "On the transitional reassessment of judges and prosecutors in the Republic of Albania", the Independent Qualification Commission maintained and updated a register of denunciations²⁰. This register contains data related to the number of denunciations, the data of the declarant, and the reassessment subject about whom the complaint was made. In addition, the Special Appeals Chamber has a relevant section on its official website, through which citizens can report corruption²¹.

According to the IQC, citizens had made around 6,600 denunciations of prosecutors and judges by July 31, 2024; a significant portion of the denunciations have served as evidence and informed the decisions of the IQC—in some cases, they have proved decisive²².

The role of the International Monitoring Operation (IMO)

The International Monitoring Operation (IMO) has been and still is an essential mechanism in Albania's judicial vetting process, as established by Article B of the Annex to the Albanian Constitution and the vetting law. With its primary role to monitor and oversee the re-evaluation process comprehensively, ensuring transparency and fairness, the IMO has operated and continues to operate within the framework of European integration and Euro-Atlantic cooperation and is led by the European Commission.

The IMO's²³ management board consists of three EU representatives: the Head of Unit responsible for Albania at DG NEAR, the Head of the Rule of Law Section at the EU Delegation in Tirana, and the Head of the Interinstitutional and International Relations Unit at DG JUST²⁴. The operational team includes eight international observers (seven from EU member state judiciaries and one from the US judiciary), all with over 15 years of experience as judges or prosecutors.

These observers have the authority to recommend appeals to the Public Commissioner, focusing on enhancing factual clarity, harmonizing case law, or addressing legal ambiguities. Their recommendations, issued by a commission of at least three IMO representatives, do not always aim to overturn decisions but often seek to improve legal interpretation and judicial standards. Observers may also file dissenting opinions on decisions by the Independent Qualification Commission (IQC) or the Special Appeal Chamber.

The initial mandate of the vetting bodies, including the IMO, was for five years (2017-2022) but was extended to 2024 for the IQC and 2025 for the Special Appeals Chamber by a parliamentary vote on 10 February 2022²⁵. The Albanian Assembly approved the extension with 118 votes in favour, none against, and four abstentions, despite opposition criticism regarding impartiality.

During the parliamentary debate, then-Democratic Party Chairman Lulzim Basha supported the extension of their mandate, citing concerns over government control of the process if left solely to domestic institutions. His position aligned with a joint statement from the EU Delegation to Albania and the US Embassy in Tirana, urging MPs to prioritize national and institutional integrity over partisan interests. The IMO's continued involvement reflects its pivotal role in safeguarding the integrity and credibility of Albania's judicial reforms, a cornerstone of its EU accession efforts.

Part 3 - The Implementation of Judicial Reform in Albania

3.1. Problematic Aspects from the Implementation Phase

In this section, several years on from the approval of justice reform, we will try to identify and assess different issues which continue to detract from the good governance of its components. Though there have been undeniable achievements, different opinions are now being voiced in the ongoing debate on the need to improve justice reform by 'correcting' those problems that have been encountered which were not anticipated during the planning phase of the reform and for which no mitigation was foreseen.

The problems faced during the implementation of justice reform are mentioned in the international reports. Looking back to the first years of the implementation phase, the justice institutions were characterized by institutional deadlocks, considerable delays in the appointment process for the new and existing institutions, and other obstacles caused by the lack of available resources. Moreover, institutional conflicts among key political actors (President vs Parliament) and accusations of attempts to "capture" the justice system, a lack of adequate infrastructure, and a combination of the above slowed down the work of the new structures.²⁶

One of the main problem areas in the implementation stage was the inability to fill the vacancies in the newly-created and existing institutions, after the vetting process led to an exodus of judicial professionals from the system. Due to the human resources vacuum thus created, the Albanian government announced a new judicial map in 2022: the "re-organization of the country's first-instance and appellate courts and prosecutors" chart, which significantly reduced the number of courts in the country. Specifically, the number of first-instance courts was reduced from 29 to 12, and all six appeals courts were merged into a single institution based in Tirana.²⁷ These changes, which came in for criticism from a number of legal professionals, sought to improve the efficiency of the judicial system, allowing it to deal with the enormous backlog.

The implementation of this new judicial organogram began in phases, starting in February 2023, but has faced significant challenges during its implementation. While it was intended to streamline judicial processes and reduce case backlogs, results have been mixed. Some regions have reported improvements in efficiency, but others continue to struggle with delays coupled with increased travel burdens for citizens seeking justice. Additionally, the centralization of the appeals courts has led to logistical challenges and concerns about access to justice for those who live outside the capital. The transition has also met with resistance from legal professionals, who argue that the changes may compromise the quality of the judicial services provided. Overall, while the new judicial map has potential benefits, its effectiveness in resolving backlogs and other systemic issues has yet to be fully realized.

Reports also note that during the implementation phase, despite the increase in the budget allocated to justice institutions, there have been various cases of falling financial support for specific structures. Moreover, there is still a pressing need to properly fund the institutions which investigate and prosecute corruption and organized crime. In the context of these developments and the debate on the judiciary, in 2024 PM Rama proposed the creation of a Special Parliamentary Commission to undertake reforms in this area, which relates to good governance, the Rule of Law, and the fight against corruption. This includes justice reform, and all these areas are part of Cluster 1 of the EU acquis. The Special Parliamentary Commission "For Deepening Reforms for Good Governance, Rule of Law and Anticorruption for Albania 2030 in the European Union", the so-called 'anti-corruption commission', was proposed in a resolution approved by the Parliamentary Group of the Socialist Party and approved by Parliament, albeit by a majority vote, in May 2024. It is led by the MP Fatmir Xhafaj (SP), who previously headed the Special Commission on Justice Reform in 2014-2016.²⁸

The commission has faced significant criticism from the justice system and civil society, as well as being rebuffed by these stakeholders.²⁹ Sali Berisha, leader of the Democratic Party, has accused Prime Minister Edi Rama of deciding unilaterally on the commission without proper parliamentary discussion. Berisha and other opposition members argue that the commission is an attempt by Rama to exert control over the reform process and maintain power. Critics have also targeted Fatmir Xhafaj, the commission's leader, questioning his credibility due to his brother's arrest on drug trafficking charges.

As a result, the Democratic Party views the commission as lacking impartiality and transparency and has refused to participate in the commission to date, citing concerns that it is merely a tool for Rama to exercise executive control.

Further efforts are needed to ensure follow-up prosecutions in vetting cases where there are indications of criminal offences being committed by judges and prosecutors. The low number of prosecutions resulting from the vetting process in Albania is indeed a significant issue. Despite the vetting process revealing numerous cases of misconduct and corruption among judges and prosecutors, there have been relatively few prosecutions. This discrepancy can be attributed to several factors: Firstly, the vetting process is primarily focused on assessing the integrity and professional conduct of judicial officials, rather than directly initiating criminal proceedings. Secondly, there are systemic challenges within the prosecution services, including limited resources and capacity to handle the volume of cases referred by the vetting institutions.³⁰ Additionally, there is often a lack of coordination between the vetting bodies and the prosecution services, which hampers identified cases being followed up effectively.³¹

There have been instances of judges in Albania passing the vetting process despite not being able to justify their wealth,³² as well as cases like that of the prosecutor Antoneta Sevdari, who was dismissed on the evidence brought to light by the evaluation but later reinstated by decision of the ECHR.³³ This issue arises due to several factors, including inconsistencies in the vetting criteria and the challenges involved in verifying the accuracy of asset declarations. In some cases, the vetting bodies may lack the necessary resources or expertise to thoroughly investigate complex financial situations, leading to questionable approvals.³⁴ These gaps in the vetting process undermine the credibility of the judicial reform and raise concerns about the effectiveness of the measures intended to ensure integrity within the judiciary. Addressing these issues will require strengthening the vetting procedures and ensuring that more rigorous and transparent evaluations are conducted of judicial officials' assets and financial backgrounds.

3.2. Driving High-Profile Anti-Corruption Convictions

The Special Anti-Corruption and Organized Crime Structure (SPAK) has been a cornerstone of Albania's judicial reform efforts. Established in 2019, SPAK has been instrumental in tackling the high-level corruption and organized crime that have long plagued the country's political and economic landscape. One of SPAK's notable achievements is the prosecution of several high-profile cases involving former government officials and business figures. These cases have underscored SPAK's commitment to holding powerful individuals accountable, regardless of their status. After the creation of the Special Anti-Corruption Structure (SPAK), Albania has moved beyond a highly problematic phase in dealing with corruption within its own ranks.

Prior to SPAK, no senior-level convictions had been recorded, despite numerous high-profile cases. For instance, Lulzim Basha (DP) was indicted for abuse of power and breaking tendering rules as the transport minister responsible for building the Durrës-Kukës highway that connects Albania with Kosovo, and Fatmir Mediu (Republican Party, a DP ally) was charged with abuse of power in his role as defense minister after the 'Gërdec' ammunition depot explosion that killed 26 people and injured over 300. Both cases were closed by the Supreme Court in 2009 without being fully investigated, allowing the officials involved to remain in Cabinet positions.

With the establishment of SPAK, Albania entered a new phase marked by a stronger commitment to pursuing senior-level convictions and addressing corruption more effectively. Some notable examples of the high-profile cases SPAK has handled include:

- **The Tahiri Case:** Former Interior Minister and prominent SP figure Saimir Tahiri was prosecuted for drug trafficking and corruption. SPAK found him guilty of aiding his cousins in international drug smuggling operations. In 2019, he was convicted of abuse of office and handed a 5-year prison sentence, which was later reduced to 3 years and 4 months due to an abbreviated trial.³⁵ The reduction of Saimir Tahiri's sentence had a notable impact on public opinion regarding judicial reform. Many Albanians viewed the initial conviction as a demonstration of the judiciary's

independence and the fact that the courts could make decisions based on legal grounds rather than political pressure. However, the reduction of his sentence met with mixed reactions. Some people felt that the reduction undermined the credibility of the judicial reform efforts, since it indicated that influential figures could still evade full accountability.

- **The Llalla case:** Adriatik Llalla, the former General Prosecutor of Albania, was convicted by SPAK for concealing assets. Llalla was found guilty of hiding assets worth approximately one million euros and was sentenced to two years imprisonment in September 2021. Following his conviction, Llalla fled Albania, leading to the issuance of an

international arrest warrant. His whereabouts were initially unknown, but he was later found in Italy. Adriatik Llalla has not been extradited from Italy to Albania; rather, he has been granted political asylum, which has effectively halted the extradition process.³⁶ This case highlights the challenges facing judicial reform initiatives in Albania. While efforts like those by SPAK are crucial, the inability to bring convicted individuals to justice can be seen as a setback. When high-profile individuals evade justice by fleeing the country, it undermines public trust in the judicial system's ability to enforce the law impartially and effectively, thereby reinforcing the belief that the judicial system is biased. Still, the case of Adriatik Llalla is not the only instance of a high-profile individual fleeing Albania after being implicated in corruption.

- **The Ahmetaj case:** Former Deputy Prime Minister and former Minister of Finance Arben Ahmetaj (SP) is under investigation by SPAK in relation to several serious charges including money laundering, passive corruption, false declaration of wealth, and abuse of duty. One of the most significant aspects of the investigation involves the "incinerator case," in which Ahmetaj is accused of receiving substantial bribes from businessmen involved in waste management contracts. These bribes allegedly included payments for luxury accommodation and properties. As part of the investigation, SPAK has seized properties linked to Ahmetaj, including villas in coastal areas owned by his current partner and ex-wife. In July 2023, the Albanian Parliament voted to approve SPAK's request to arrest Ahmetaj. This vote was necessary due to the legal immunity enjoyed by MPs. Ahmetaj is currently in Switzerland; although an international arrest warrant has been issued,³⁷ Switzerland has not approved Albania's request for his extradition and instead granted him political asylum. This situation has further complicated efforts to bring him back to Albania to face charges. High-profile cases like those of Adriatik Llalla and Arben Ahmetaj, who have sought asylum abroad, highlight the challenges faced by the judicial system in holding influential figures to account. This has led to a growing perception that the system is unable to deliver impartial and effective justice, thereby eroding public trust in the reform efforts.
- **The Dako case:** Vangjush Dako (SP), the former mayor of Durrës and a prominent member of the Socialist Party, is under investigation by SPAK in relation to multiple charges. Dako is accused of abuse of office in two significant cases. The first involves the construction of a building in Durrës, for which planning permission for seven floors was received, but which had 11 floors when completed in 2014. This building was later damaged in the 2019 earthquake. The post facto legalization of the additional floors was allegedly carried out in violation of the law. The second case concerns a tender for the rehabilitation of the coastal promenade in Durrës. The project, carried out between 2014 and 2015, saw its budget value increased tenfold due to miscalculations, resulting in a significant financial loss to the state. Dako has also been implicated in a vote-buying scheme in place during the June 2017 parliamentary elections. Wiretapped conversations revealed his collaboration with the Avdylyaj clan, a local crime family, to secure votes for the Socialist Party. SPAK has closed the initial phase of its investigations and officially declared Dako a defendant. In February 2024, the Special Court against Corruption and Organized Crime decided to release him from prison and place him under house arrest.³⁸ This decision was made while the investigations into his alleged misdeeds were still ongoing.
- **The Habilaj family case:** The Habilaj case is one of the most significant investigations undertaken by SPAK. The Habilaj family, and Moisi Habilaj in particular, was at the center of a major drug trafficking network that operated between Albania and Italy. The group was involved in smuggling large quantities of cannabis and other drugs. The Habilaj family was linked to high-profile political figures, including former Interior Minister Saimir Tahiri. Tahiri was accused of facilitating the Habilaj family's activities, although he was ultimately convicted of abuse of office rather than direct involvement in drug trafficking. In May 2021, the Special Court against Organized Crime and Corruption sentenced Moisi Habilaj and other members of the group to a total of 37 years in prison for drug trafficking and involvement in a structured criminal group. SPAK seized numerous assets belonging to the Habilaj family, including properties, vehicles, and businesses. However, some of these assets were later returned following legal challenges.³⁹ Albania faces major obstacles to effectively seizing assets from convicted criminals. Despite legal efforts to confiscate properties and funds acquired through illegal activities, many assets remain under the control of the criminals' relatives or associates. The case of Kelmend Balili, a convicted drug smuggler, is a typical example: his seafront hotel

and several apartments are still managed by his family, despite being seized by the authorities.⁴⁰ This situation underscores the difficulties in enforcing asset seizure laws and the need for more robust mechanisms to ensure that criminal assets are permanently removed from the criminals' control.

While SPAK has made notable strides in prosecuting high-profile cases, the varying outcomes underscore the complexities and challenges of judicial reform in Albania. The success of SPAK's prosecutions has been mixed, reflecting both significant achievements and ongoing challenges.

3.3. Navigating the Storm: SPAK's Challenges in Dealing with High-Level Corruption

SPAK has encountered several challenges to maintaining confidentiality during its investigations. Despite strict protocols, there have been instances where information has been leaked by insiders, undermining ongoing investigations and eroding public trust. The Tahiri-Habilaj case is a notable example of a SPAK investigation whose outcome was compromised by an internal leak. During the investigation into former Interior Minister Saimir Tahiri and his alleged connections with the Habilaj drug trafficking network, there were reports of sensitive information being leaked from within the prosecution office.

Political interference poses another challenge to SPAK's work. High-profile cases often attract significant media attention and political pressure, which can lead to attempts to influence or gain access to sensitive information. One notable instance of alleged political interference involves the investigation of former Prime Minister Sali Berisha. There were concerns that political pressures could influence the proceedings, given Berisha's prominent position and influence in Albanian politics.

Sali Berisha was under house arrest as part of a SPAK investigation. The investigation centers on allegations of corruption, particularly related to the privatization of the former "Partizani" sports complex. Berisha, who leads the opposition Democratic Party, was initially required to report to SPAK every two weeks and was prohibited from leaving the country. However, having failed to comply with these requirements, the court escalated his restrictions to house arrest. The court also barred him from communicating with anyone outside his immediate family. Albanian justice has ended the house arrest of opposition leader Sali Berisha, but he is still prohibited from leaving the country until the end of investigations. Berisha and his legal team have denied the charges, claiming that the case is politically motivated.⁴¹ He has claimed that the new justice system is an "ugly copy" of justice under the old dictatorship, suggesting that SPAK is protecting the current government and Prime Minister Edi Rama.

Sali Berisha has been vocal in his criticism of SPAK, portraying it as a tool manipulated by Prime Minister Edi Rama to target political opponents. Berisha argues that the investigations against him are politically motivated and part of a broader strategy by Rama to undermine the opposition and consolidate power. By framing SPAK as biased and controlled by the government, Berisha aims to discredit the institution and its findings. This narrative serves two main purposes: First, by casting doubt on SPAK's impartiality, Berisha seeks to diminish its authority and the legitimacy of its investigations in the eyes of the public. Then, if Berisha is found guilty, he can claim that the verdict was politically driven, thus protecting his political image and maintaining support among his followers. This strategy is not uncommon in political contexts where leaders face legal challenges, as it helps to rally their base and create a narrative of victimization.

Similarly, Ilir Meta, the former president and prime minister of Albania, has adopted the same orchestrated anti-SPAK rhetoric. He was arrested by the SPAK on charges of corruption, money laundering, and failure to declare assets. His arrest has sparked significant controversy. Meta's political party, the Freedom Party, condemned the arrest, describing it as politically motivated and an attack on the opposition. The arrest has intensified political tensions in Albania, with reactions ranging from support for the justice system's actions to accusations of political persecution.

The campaign to discredit SPAK has indeed intensified and now involves both disinformation and direct threats. Media outlets and senior political figures from both the government and the opposition are now spreading disinformation to undermine SPAK's credibility. This includes accusations of political bias, selective justice, and inefficiency. In addition, SPAK judges and prosecutors, along with their family members, have faced physical and verbal threats intended to intimidate and pressure them into abandoning or altering their investigations.⁴² Such actions not only endanger the lives of these officials, but also threaten the integrity of the judicial process. High-profile figures, including politicians and media personalities, have publicly criticized SPAK, accusing it of being a tool for pursuing political vendettas. These statements are often amplified by media aligned with these figures, spreading further doubt and mistrust. Critics argue that investigating key opposition figures like Berisha and Meta could strengthen Rama's power in the upcoming elections, leaving the country

without an effective opposition. Others retort that being in opposition should not be used as an excuse to avoid accountability for past governance issues.

As of recent, Erion Veliaj, the Mayor of Tirana, has also been critical of SPAK, accusing it of political interference and failing to perform its duties effectively.⁴³ Veliaj has been under investigation by SPAK for alleged corruption and abuse of office, particularly related to the “5D” file and Tirana’s incinerator affair. SPAK has initiated a property investigation into Veliaj and his family members, including his wife and brother. This investigation involves scrutinizing their assets and financial transactions to identify any illicit activities. Veliaj has claimed that SPAK’s actions are politically motivated and part of a broader effort to undermine his position and reputation. He argues that the investigations are biased, and that SPAK is being used as a tool by political opponents to target him.

The situation highlights the complex, challenging and often adversarial environment in which SPAK operates. While Veliaj accuses SPAK of political bias against him, the opposition claims that SPAK is not doing enough to bring him to justice and is protecting him on the instructions of Prime Minister Edi Rama. Critics argue that SPAK’s decision to “fragment” the incinerators file, singling out municipal directors rather than the mayor, is a move to shield Veliaj—even though these directors are directly overseen by the mayor. This dual criticism from both government and opposition underscores the contentious nature of SPAK’s work, suggesting that SPAK is under significant political pressure from various sides. High-level personalities under investigation are trying to undermine SPAK’s credibility in order to protect themselves. By questioning SPAK’s motives and effectiveness, they aim to cast doubt on its findings and reduce its impact. This pressure not only complicates SPAK efforts to conduct impartial investigations, it also influences public perceptions, making it harder for the institution to gain the necessary support and cooperation from the public and other stakeholders.

One other case in which the SPAK found itself at the epicenter of accusations of political interference was that of Fredi Beleri, the ethnic Greek mayor-elect of Himara, who was arrested just days before the local elections in May 2023 on charges of vote-buying. His arrest and subsequent trial have sparked significant controversy, with accusations from various political figures including Sali Berisha, who claimed that the case was orchestrated by Prime Minister Edi Rama to manipulate the political landscape. Beleri’s supporters argued that the charges were politically motivated, and that SPAK was being used as a tool to suppress opposition. Meanwhile, the Greek government has also criticized the case, with Athens accusing the Albanian authorities of politically motivated actions against Beleri. They argued that his arrest on charges of vote-buying was intended to influence the political processes and suppress the representation of the Greek minority.

Apart from the criticism of political bias and selective targeting of opposition figures, there are also other challenges with regards to SPAK. Some observers have noted that the progress in handling certain high-profile cases has been slower than expected. This has led to frustrations among the public and stakeholders, who are eager for swift justice. SPAK has also faced challenges stemming from limited resources, which can impact its ability to conduct thorough and timely investigations. These include both financial and human resources. While SPAK has made efforts to be transparent, some critics argue that its communication with the public could be improved, with clearer and more frequent updates on ongoing cases used to foster greater public trust and understanding. Additionally, there are concerns about the safety and independence of SPAK’s prosecutors and judges, who have faced threats and intimidation.

The Center for the Study of Democracy and Governance recently presented its study on the work of the Special Prosecutor’s Office (SPAK) and the Special Courts against Corruption and Organized Crime.⁴⁴ The findings highlight significant challenges in prosecuting senior officials. Out of 586 defendants sent for trial in corruption cases, only 32 were high officials, representing just 5.46% of the total. This statistic underscores the ongoing difficulties in bringing powerful officials to justice. Additionally, the sentencing of high-ranking officials remains problematic. Thus, of the 479 convictions for corruption, only 20—a mere 4.17% of the total—involved high-ranking officials. Despite efforts to hold individuals in high positions accountable, the report indicates that the number of sentences passed on these officials remains notably low, suggesting persistent challenges in tackling high-level corruption.

3.4. SPAK: Albania’s Beacon of Trust with Strong International Backing

While SPAK has not yet fully convinced all its critics of its political impartiality, it enjoys robust support from the international community, which views its efforts as a beacon of potential for meaningful changes in Albania’s judicial system. This support is crucial in helping SPAK navigate the country’s difficult political landscape. International partners, including the EU

and the US, recognize the significant strides SPAK has made towards combating high-level corruption and organized crime and stress the structural elements of the reform, which are designed to ensure the future independence and impartiality of the judicial system.

These elements include the appointment of prosecutors by the High Prosecutorial Council and the independent management of its budget; together, they bolster SPAK's capacity to operate free from political influence. The legal framework governing SPAK includes provisions that protect its operations from political interference. SPAK collaborates with international organizations which provide oversight and support. This international involvement helps to reinforce SPAK's independence and accountability. SPAK officials, including prosecutors and investigators, have protected tenure, meaning they cannot easily be removed from their positions. This protection helps shield them from political retaliation.

Several international organizations have evaluated SPAK's work positively, and the institution has also managed to earn public trust. In a recent national survey on Albania published by the International Republican Institute (IRI)⁴⁵, nearly 86% of the respondents thought that corruption in Albania was a serious problem, while 69% affirmed that they believed SPAK can do its work without political influences. A survey conducted by Euronews Albania in May 2024 found SPAK to be the most trusted Albanian institution, with 32% of respondents expressing their trust in it.⁴⁶ In this survey, 54 percent of the respondents evaluated SPAK's work positively. The US Embassy in Tirana (40.5%) and the EU Delegation (35.8%) remain the most trusted institutions overall. The Albanian public's trust in SPAK seems to stem more from the oversight of international bodies like the United States Embassy and the European Union Delegation, rather than from a restored faith in local judges and prosecutors.

This situation underscores a significant failure of the Albanian political class to instil confidence in the country's judicial system. The reliance on international validation indicates that the public perceives local institutions as lacking independence and integrity. This perception is further reinforced by the political class's responses to cases handled by SPAK, which often justify the public's preference for international oversight over local representation. This dynamic reveals a deep-rooted concern: that the Albanian political personnel are not capable of creating a trustworthy and transparent judicial system. As a result, the public continues to look to international entities for assurance, rather than their own local institutions. This is a pressing issue that needs to be addressed to build a more self-reliant and credible judicial system in the country.

Part 4 - Year-over-Year Progress Assessment

4.1. Albania's Progress Review on Judiciary from 2021 to 2024

Albania's progress in the Rule of Law sector has been constantly monitored by the European Union, as it is one of the most critical areas in which the Albanian government needs to achieve concrete results in order to advance its EU accession path. One of the primary documents that monitor developments in this sector are the progress reports published by the European Commission (EC).

The last four EC progress reports on Albania have consistently highlighted several key points. Albania is moderately prepared in the functioning of its judiciary, with no change in the overall assessment over the past four years. While there have been advancements in the vetting process, the 2023 report raised concerns about its quality, indicating critical areas needing attention. Despite establishing necessary strategies and action plans, reports from 2021 to 2024 emphasize the need for improved coordination among judicial institutions. Albania's specialized bodies lack adequate human resources, impacting their effectiveness. The legal framework for judicial independence and impartiality is in place, but practical implementation is hindered by internal and external interference. Institutions for conducting disciplinary investigations into magistrates are established but lack human resources, leading to a backlog of complaints. Judicial reform has reduced political influence over appointments, but more transparency and competitiveness in evaluations are needed. Improvements in training by the School of Magistrates are noted, but further enhancements and alignment with European standards are still needed. SPAK's work in fighting high-level corruption is positively evaluated, but its capacity needs strengthening. Persistent issues such as unfilled vacancies, lengthy proceedings, and a backlog of cases continue to affect the judiciary's effectiveness. Thus, the EC's consistent recommendations over the past four years highlight ongoing issues, despite some progress.

The same issues highlighted in previous European Commission reports were reiterated in the 2024 Rule of Law Report.⁴⁷ This report underscores Albania's ongoing challenges vis-a-vis the judiciary, including the need for improved coordination among judicial institutions, the lack of adequate human resources, and persistent issues with judicial independence and

impartiality. The 2024 Rule of Law Report on Albania emphasizes several key points: It acknowledges some progress in judicial reforms and anti-corruption efforts, particularly noting the positive impact of the vetting process. However, it also highlights significant concerns, such as the need for better coordination among judicial institutions, the shortage of human resources affecting the functionality of specialized bodies, and ongoing issues with judicial independence due to internal and external interference. The report stresses the importance of enhancing the quality of training for new recruits and graduates from the School of Magistrates and calls for further improvements in the transparency and competitiveness of the judicial appointment process. Additionally, it points out the need to strengthen the capacity of SPAK to fully meet its operational needs and address the backlog of cases that continue to hinder the efficiency of the judiciary.

Despite the glass being as much half-empty as it is half-full with regard to Albania's progress in judicial reform, the country seems to have unlocked the next step in its bid to join the EU. The EU-Albania Intergovernmental Conference (IGC) to start accession talks on Cluster 1 (the so-called "fundamentals") took place on 15 October.⁴⁸ This significant step, which decoupled Albania's EU accession path from that of North Macedonia, was seen by many analysts as a confirmation of the country's progress by Brussels. However, others viewed it as more of a (geo)political decision, with Brussels turning a blind eye to Edi Rama's problematic governance in an effort to address EU integration process fatigue and the bilateralization of problems that have created multiple obstacles to enlargement.

Overall, the EU remains the key pressure point for Western Balkan governments, including the Albanian, to implement reforms. The opening of negotiations allows Brussels to better monitor progress and put its transformative power into practice, serving the interests of Albanian citizens. Regardless of why Brussels decided to proceed with Albania, the opening of Cluster 1 is poised to positively impact the full implementation of reforms. The table below offers a detailed review of the progress Albania made in 2021-2024 with regard to Chapter 23, which covers the judiciary and is one of the most challenging chapters in the EU accession negotiation process.

CHAPTER 23: JUDICIARY AND FUNDAMENTAL RIGHTS Functioning of the Judiciary	CLUSTER 1: THE FUNDAMENTALS OF THE ACCESSION PROCESS				
	Rule of Law and Fundamental Rights				
	EC Progress Report 2021	EC Progress Report 2022	EC Progress Report 2023	EC Progress Report 2024	Brief Conclusion
	General Assessment	General Assessment	General Assessment	General Assessment	General Assessment
	Albania is moderately prepared vis-a-vis the functioning of the judiciary.	Albania is moderately prepared vis-a-vis the functioning of the judiciary.	Albania is moderately prepared vis-a-vis the functioning of the judiciary.	Albania is moderately prepared vis-a-vis the judiciary and fundamental rights and has made some progress.	The last four EC reports have consistently declared that Albania is moderately prepared vis-a-vis the functioning of its judiciary. Over these years, there has been no change in the Commission's evaluation, and the general assessment remains the same.
	The Vetting Process	The Vetting Process	The Vetting Process	The Vetting Process	The Vetting Process
	The vetting process has continued to deliver tangible results despite the challenges posed by the COVID-19 pandemic.	A time-limited constitutional extension of the mandate of the vetting bodies was adopted, thus ensuring the uninterrupted and consistent continuation of the vetting process.	The vetting process for judges and prosecutors has advanced with overall good results, although the pace of proceedings in appeals needs to be stepped up in light of the revised constitutional deadline, but with due regard for the quality of the process.	The vetting process has continued and is close to completion in first instance, with overall positive impact on the independence and accountability of the judiciary. The International Monitoring Operation (IMO), deployed under the oversight of the European Commission, continued to carry out an independent oversight of the process. On	Over the past four years, the EC's reports have highlighted the progress made in the vetting process. The 2023 report raised concerns about the overall quality of the process, indicating that while progress has been made, there are still critical areas that require attention to ensure the integrity and effectiveness of the vetting procedures. The first-instance
				21 October 2024, the vetting institutions had completed 798 vetting cases at first instance amounting to 99% of the total.	vetting process concluded in December, having reviewed all 805 judges and prosecutors. Of these, 373 passed, 105 resigned prior, and the rest were dismissed. However, this is not the end of the road. The Special Appeals College, responsible for handling appeals, will continue its operations until December 2026 to ensure that all pending appeals are thoroughly reviewed and adjudicated.
	Justice Institutions Coordination	Justice Institutions Coordination	Justice Institutions Coordination	Justice Institutions Coordination	Justice Institutions Coordination
	The cross-sectoral 2017-2020 justice strategy and action plan have been updated and remain in force until the end of 2021. The Ministry of Justice has established the necessary interinstitutional coordination structures to support the implementation of the reform. Coordination mechanisms across the justice institutions, communication and transparency should be	The new cross-sector justice strategy and its action plan for 2021-2025 have been adopted by the Council of Ministers and need to be implemented effectively. Further improvement of coordination between the justice institutions remains necessary.	The Ministry of Justice reports regularly on the implementation of the 2021-2025 cross-sector justice strategy and its action plan. Albania needs to ensure effective cooperation between justice institutions, the allocation of sufficient resources, and the efficient and systemic functioning of the justice sector in the context of implementing the justice strategy and its action plan.	Implementation of the Cross-cutting Justice Strategy 2021-2025 still needs to be improved. The quality of the strategy and its monitoring are generally satisfactory. However, the implementation rate and reporting capacity of the competent judicial institutions are still low. In addition, the quality of statistical data remains poor. Coordination is weak between the HJC and the	While the reports highlight that the necessary cross-sectoral strategies and action plans have been established over the past four years, the reports from 2021, 2022, 2023 and 2024 consistently emphasize the need for improved coordination among judicial institutions. This indicates that the practical implementation of these strategies has faced significant challenges.

	further enhanced.			HPC. Their coordination with the Ministry of Justice, the High Justice Inspector (HJI) and other judicial institutions on key judicial policies and their systemic follow-up to operational conclusions remains weak.	
	Independence and Impartiality	Independence and Impartiality	Independence and Impartiality	Independence and Impartiality	Independence and Impartiality
	The legal and institutional framework put in place by the 2016 justice reform ensures strong independence and impartiality guarantees for magistrates. However, attempted internal and external interference with the judicial system continues to remain an issue of concern. Integrity and judge-craft should continue to remain the focus of magistrates' training.	The 2016 justice reform created the legal and institutional framework to guarantee the independence and impartiality of magistrates. The independence of the judiciary is guaranteed by the Constitution. However, concerns continued to be raised about alleged attempts to interfere and exert pressure on the judicial system. The training of magistrates should remain focused on integrity and judge-craft.	The 2016 justice reform set out a satisfactory legal and institutional framework to guarantee the independence and impartiality of magistrates. However, concerns continued to be raised about alleged attempts to interfere with and exert pressure on the judicial system. The training of magistrates should further focus on integrity and judge-craft. Targeted action to reduce undue influence and increase public trust in the judiciary should be considered further.	The independence and impartiality of the judiciary is satisfactory in the higher-level courts, including courts of appeal, and needs to be improved in the courts of first instance. Concerns remain about attempted interference and pressure on the judicial system from public officials and politicians. During the reporting period, two serious incidents were recorded against magistrates, who were promptly placed under protection. Several public political attacks, inappropriate language and threats have been directed at magistrates.	The last four reports from the European Commission confirm the significance of the judicial reform in Albania, as it has established the necessary legal framework to ensure independence and impartiality. However, these reports also recognize that this has not always been the case in practice. Internal and external interference with the judicial system continues to be a significant issue of concern.

	Accountability	Accountability	Accountability	Accountability	Accountability
	The High Justice Inspector (HJI) has performed its functions in full during the reporting period, notably by initiating and conducting disciplinary investigations against magistrates. Additional staff, premises and an increased budget has been allocated to HJI. The recruitment of additional inspectors is still required, as well as targeted measures to address the backlog of cases and allow the HJI to perform regular thematic inspections. During the reporting period, HJI has received 3054 complaints of which 1347 were inherited from the previous Inspectorate. HJI has handled 173 complaints and started eight investigations.	The High Justice Inspector (HJI) continued to be fully operational, initiating and conducting disciplinary investigations against magistrates. The HJI has continued to be understaffed and unable to reduce the accumulated backlog, despite the allocation of additional staff and premises and an increased budget. The recruitment of additional inspectors and improvement of HJS's capacity remains necessary. During the reporting period, the HJI received 1257 complaints. It processed 4124 complaints in total and started 22 investigations, of which 17 resulted in disciplinary proceedings.	The High Justice Inspector (HJI) continued to be operational, initiating and conducting disciplinary investigations against magistrates. Nearly half of the planned inspectors (12 out of 26) are in office. The recruitment of additional inspectors and the improvement of HJI's capacity remain necessary. The HJI has adopted a revised methodology to reduce the backlog of 1606 cases that it inherited, of which 1072 have yet to be processed. The HJI has not accumulated a backlog of new cases since it was set up. During the reporting period, the HJI received 789 complaints. It processed 534 complaints and started 28 disciplinary investigations, leading to its requesting disciplinary measures against six magistrates from the Councils.	Challenges persist in the attractiveness of the position for magistrate inspectors. The HJI's capacity to conduct high-quality inspections should be increased. Further development and conduct of thematic inspections remain a priority. The Councils, the HJI and the High Inspectorate of Declaration and Audit of Assets and Conflicts of Interest (HIDAACI) should make further efforts in performing thorough asset checks and, where applicable, background checks on magistrates and candidate-magistrates. These checks should be consistent with the high standards set in the vetting process.	While the institutions responsible for conducting disciplinary investigations against magistrates are established, their effectiveness is significantly hindered by a lack of human resources. This shortage contributes to a high backlog of complaints that need to be verified and processed, thereby delaying justice and reducing the overall efficiency of the disciplinary system.

Professionalism and Competence	Professionalism and Competence	Professionalism and Competence	Professionalism and Competence	Professionalism and Competence
The system for recruiting, selecting, appointing, transferring and dismissing judges and prosecutors is managed exclusively by the self-governing institutions of the judiciary. Constitutional and legal changes have reduced political influence during the appointment process, ensuring a merit-based career system. The quality of the initial and continuous training at the School of Magistrates (SoM) has improved. An important milestone was reached at the end of 2020 with the appointment of three new judges to the Constitutional Court. With seven judges in office, the Constitutional Court has regained the quorum of six members required to hold plenary sessions. It is thus fully functional and meets the condition specified for the first IGC.	The system for recruiting, selecting, appointing, transferring, and dismissing judges and prosecutors is managed exclusively by the self-governing institutions of the judiciary. Continued implementation of judicial reform further reduced political influence throughout the appointment process, thus ensuring a merit-based career system. The evaluation process, including the ranking of candidates needs to be more transparent and take into account the recommendations made by the Venice Commission.	The system for recruiting, selecting, appointing, transferring and dismissing judges and prosecutors is managed exclusively by the self-governing institutions of the judiciary. The continued implementation of judicial reform has reduced political influence throughout the appointment process, thus contributing to a more merit-based career system. The evaluation process, including the ranking of candidates, needs to be more transparent and allow for more competition, in line with the Venice Commission's recommendations.	Despite strong legal safeguards, merit based appointments and career development are weakened in practice by the HPC's failure to evaluate prosecutors and the HJC's slow pace of qualitative evaluations for judges. The continued use of transfers as an alternative to promotions is a serious concern. The limited number of judges at several courts, coupled with the lack of an integrated case management system, leads to a worrying situation where the random allocation of cases is not widely applied in courts and is not applied at all in prosecutors' offices.	The continued implementation of judicial reform has successfully reduced political influence throughout the appointment process, thereby fostering a more merit-based career system. However, the last progress reports from the Commission highlight the need for a more transparent and competitive evaluation process, in line with the Venice Commission's recommendations.

Quality of Justice	Quality of Justice	Quality of Justice	Quality of Justice	Quality of Justice
The quality of the initial and continuous training at the School of Magistrates (SoM) has improved. The SoM should simplify the application process for its continuous training activities. Further efforts are needed from the SoM to reinforce its academic staff and to ensure competitive and transparent recruitment procedures. The SoM should focus on further improvements to the quality of the methodology and diversity of the content of the initial and continuous training.	The quality of the initial and continuous training at the School of Magistrates (SoM) requires improvement. A further increase in the cohorts of students, and therefore of graduates, is also required in light of the ongoing dismissals arising from the vetting process. The SoM needs to intensify its efforts to strengthen its academic staff and to ensure competitive and transparent recruitment procedures. The continuous training should improve its methodology and focus more on daily needs as well as on case studies for judges and prosecutors.	The overall quality of the initial and continuous training at the School of Magistrates (SoM) requires further improvement. The SoM needs to continue improving the quality of its new recruits and graduates through <i>inter alia</i> a comprehensive revision bringing its entry examination into line with European standards. A comprehensive analytical projection of the short- and long-term needs of the judicial system, including the number of magistrates required, is still missing. The quality of final court decisions needs to be further improved. Access to fully reasoned decisions and their timely publication remains very limited.	Further improvements to the judicial training system are still necessary. There was no specific progress in the performance of the School of Magistrates' comprehensive revision of the annual entry exam, the review of initial and continuous training curricula, and the quality and integrity of its staff. The 2024 annual entry exam was marred by allegations of irregularities due to reported technical problems. The initial and continuous training of judges does not ensure their further specialisation. The HJC and the High Court have taken some steps to make case law more consistent, which still requires further consolidation. Access to reasoned decisions and their timely publication are very limited. Judicial quality is seriously hampered by the high number of judicial vacancies at appeal courts	The European Commission acknowledges the improvements in the quality of training provided by the School of Magistrates. However, it reiterates the need for the School to continue enhancing the quality of new recruits and graduates. This will necessitate <i>inter alia</i> a comprehensive revision of the entry examination that aligns it with European standards. Additionally, the quality of final court decisions must be further improved.

				and first instance courts of general jurisdiction, the lack of progress in appointing court chairs at all levels and the insufficient amount of court staff, particularly legal assistants.	
	High-Level Corruption and Corruption in the Judiciary	High-Level Corruption and Corruption in the Judiciary	High-Level Corruption and Corruption in the Judiciary	High-Level Corruption and Corruption in the Judiciary	High-Level Corruption and Corruption in the Judiciary
	The vetting of members of the judiciary is bringing results in the fight against corruption. SPAK has contributed to an increase in the seizure and confiscation of criminal assets in corruption-related cases.	SPAK has conducted criminal proceedings and financial investigations in several high-level cases. Some final convictions of high-ranking state officials have been pronounced. The vetting of members of the judiciary continues to bring results in the fight against corruption within the judiciary. Increasing the number of final convictions of high-level officials remains an important priority to further tackle a culture of impunity.	SPAK has conducted criminal proceedings and financial investigations in several high-level cases. Criminal convictions were pronounced by the SPAK Courts in high-profile cases. Increasing the number of final convictions in high-level cases remains an important priority to further tackle the culture of impunity. The vetting of judges and prosecutors continues to bring results in the fight against corruption within the judiciary. However, further efforts are needed to ensure due judicial follow-up in vetting cases where there are indications of criminal	SPAK has continued to deliver good results in the investigation, prosecution and convictions in high-level corruption cases, including those involving high-level politicians and officials as well as cases involving the protection of EU financial interests. SPAK's capacity in financial investigations has increased and the systematic use of financial investigations and asset confiscations has improved. However, the number of referrals to SPAK from other authorities has decreased. Other bodies tasked with fighting corruption, in particular the General Prosecution Office and the	The annual reports of the European Commission positively evaluate the work of SPAK in fighting high-level corruption in Albania. They highlight the need for the Albanian government to further strengthen SPAK's capacity to fully meet its operational needs. Additionally, the vetting process enjoys positive evaluations, with the last four progress reports noting its effectiveness in combating corruption within the judiciary. However, more effort is needed to ensure the quality of this process.

			offences.	state police, still face challenges in detecting and effectively investigating corruption. The imminent end of vetting of all judges and prosecutors at first instance is a major milestone with a positive impact on fight against corruption in the judiciary.	
	Efficiency	Efficiency	Efficiency	Efficiency	Efficiency
	The efficiency of the judicial system has been affected by the length of proceedings, low clearance rate and a high backlog. Appeal courts have a high number of inherited cases and judicial vacancies remain a problem, with only 40 out of 78 appeal judges in office. A new judicial map must be adopted and implemented urgently to re-distribute judges and resources within the judicial system. The Courts with the highest backlog are the High Court and the Administrative Court of Appeal.	The length of proceedings, the low clearance rate, and the high number of unresolved cases continue to detract from the efficiency of the judicial system. Appeal courts continue to have a high number of inherited cases and are affected by the high number of judicial vacancies, with only 30 out of 78 appeal judges in office. The new judicial map aims to re-distribute the backlog among the courts more fairly by reallocating judges and courts to the areas with the greatest backlog. The courts with the highest backlog are the High Court,	The unfilled open vacancies, the length of proceedings, the low clearance rate and the high number of unresolved cases continue to affect the efficiency of the judicial system. A robust implementation plan for the judicial map is still missing and needs to be put in place urgently. The majority of courts in Albania function with reduced personnel—on average, at less than half of their normal capacity—due to judicial vacancies. The average number of cases per judge remains high, which is a concern, especially at appeal level.	The justice system's efficiency needs to be improved. Efficiency continued to be negatively affected by challenges including the increased length of proceedings and a high backlog of cases, notably at the Court of Appeal and the Administrative Appeal Court. The annual intake of magistrates by the School of Magistrates is still insufficient. The codes of procedure are hampered by formalities and do not provide adequate tools to address the high backlog. Serious delays are experienced with the legal	Despite Albania's efforts to improve the efficiency of its judiciary system, the final results are not a cause for celebration. The same issues that plagued the system four years ago persist, negatively impacting its effectiveness. The judiciary continues to struggle with unfilled vacancies, lengthy proceedings, increased workload, and a significant backlog of cases.

		the Tirana District Court, and the Administrative Court of Appeal.	Attempts to stabilise the backlog have not yet produced results. The courts with the largest backlog are the High Court, the Appeal Court and the Administrative Court of Appeal.	deadlines on publishing the reasoned decisions by courts.	
	Recommendations	Recommendations	Recommendations	Recommendations	Recommendations
	-Further advance the process of re-evaluating judges and prosecutors; -Continue to consolidate the capacity of the judicial system and governance institutions, by <i>inter alia</i> further strengthening the legal education system and finalising and implementing the new judicial map; -Take decisive steps towards a roll-out of a new integrated case management system, and ensure its interoperability across the entire justice system in line with the European Commission's Efficiency of Justice (CEPEJ) methodology.	-Further advance the process of re-evaluating judges and prosecutors (vetting) and, where possible, increase the pace of procedures with due regards to the quality of the process; -Consolidate efforts to enhance the efficiency and transparency of all courts and prosecution offices by <i>inter alia</i> taking fast and decisive action to set up a modern Integrated Case Management System and rolling out a solid implementation plan for the new judicial map; -Continue to consolidate the capacity of the judicial system and its self-governing institutions,	-Further advance the process of re-evaluating judges and prosecutors (vetting) and speed up procedures, in particular on appeal, with due regard to the quality of the process; -Consolidate efforts to improve the efficiency of all courts and prosecution services and reduce the backlog of cases, by <i>inter alia</i> filling open vacancies, improving the functioning of the courts and streamlining/simplifying judicial proceedings, taking further decisive action to set up a modern integrated case management system, and creating a robust implementation and communication plan for the	-Further strengthen accountability by: (i) speeding up vetting procedures in appeal; (ii) speeding up evaluations of magistrates and implementing conflict-of-interest regulations by the HJC and the HPC; (iii) aligning provisions applicable to the selection of non-magistrate members of HJC and HPC with those applicable to magistrates as regards asset declaration and background checks, ensuring the highest integrity and merit principles, and a high degree of consistency with the ranking of the ad-hoc pre-selection committee (iv) filling the magistrate-	In its last four progress reports, the European Commission has consistently made similar recommendations for Albania. This repetition highlights that, despite some progress, the issues within the Albanian judiciary are complex and require a long-term approach and dedicated efforts to resolve.
		while making quality and efficiency improvements at the School of Magistrates.	- new judicial map that ensures respect of the right to access to justice and the applicable legal framework, in particular on transfers and promotions; -Continue to strengthen the capacity and independence of the judicial system and its self-governing institutions, while making quality and efficiency improvements at the School of Magistrates, by <i>inter alia</i> revising the admission examination in line with European standards.	- inspector vacancies at the High Justice Inspectorate; -Improve the quality of justice by making progress in filling vacancies for court chairs, magistrates and legal advisers at all levels of the judiciary and quality improvements at the School of Magistrates, in line with European standards, including the comprehensively revising the School of Magistrates' entrance exam, increasing the relevance of training and ensuring quality and integrity of its staff; -Improve judicial efficiency by: (i) ensuring the necessary budget for the Integrated Case Management System and rolling it out in a timely manner; and (ii) enacting the HJC roadmap to increase efficiency and reduce the backlog in the judicial system.	

Conclusion

The judiciary system in Albania has undergone significant changes since 2016, marking a departure from its previous problematic state. Despite these substantial steps towards reform, Albania has yet to complete even half of the journey towards its ultimate goal. The country faces a long road ahead to establish judicial institutions that enjoy full independence and can earn the trust and confidence of its citizens.

As Albania opened its first negotiating cluster for EU accession on October 15, 2024, Chapter 23, which covers the judiciary, will be a major focus. Albania must provide clear evidence of progress to accelerate the process and, eventually, close one of the most complex negotiation chapters with the EU. The negotiation process could potentially benefit judicial reform in Albania, as pressure from Brussels and the incentives tied to meeting obligations could drive the Albanian political class to address the challenges facing the judicial system in a more effective and timely manner.

It is crucial that the Albanian political class demonstrates the necessary political maturity and secure political dialogue and consensus to avoid future conflicts that could undermine parts of the judicial reform. Restoring political dialogue between the government and the opposition and ensuring the proper functioning of Parliament are both essential steps in this direction. Without these, Albania risks reverting to the same old patterns of political conflict that have historically undermined significant reforms in the country.

Through the weight given to the Fundamentals chapter, the EU has provided Albania with a great opportunity to use its citizens' consensus and political will to exercise their democratic rights and obligations to ensure the good governance of their democratic institutions. And this is the transformative power the enlargement process has for candidate countries.

Taking into account the imperfections, Albania's judicial reform represents enormous progress in establishing a functional democracy in a candidate country, especially since such radical reforms are usually undertaken during the negotiating phase. This is hugely significant for a post-communist country. The success of the justice reform will also test the working hypothesis of the irreversibility of democratic reforms, as well as the suitability of EU instruments for supporting such reform.

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- ¹⁰Example from a consultation meeting in Shkoder, where the High-Level Expert discusses the analysis of justice reform: <https://www.zeriamerikes.com/a/justice-reform/3075195.html>
- ¹¹The document is available here: <https://euralius.eu/images/Justice-Reform/Analysis-of-the-Justice-System-in-Albania.pdf> ¹²The decision is available here: https://www.reformanedrejtisi.al/sites/default/files/vendim_nr.15_dt.30.07.2015.pdf ¹³The Strategy of Reform in the Justice System is available here: https://euralius.eu/images/Justice-Reform/Strategy-on-Justice-System-Reform_24-07-2015.pdf
- ¹⁴Decision no. 17, dated 28.09.2015: https://www.reformanedrejtisi.al/sites/default/files/vendimi_nr_17_dt_28_09_2015.pdf
- ¹⁵Law no. 76/2016 amended the eighth part of the Constitution relating to the "Constitutional Court", the ninth part the provisions on "Judicial Power", the tenth part on "Prosecution", the eighteenth part on "Transitional Provisions", which regulates the transition to the new justice system and Constitution. An Annex was attached, detailing the transitional reassessment of judges and prosecutors (the vetting process).
- ¹⁶Analytical document, p. 282: The main problem with the performance evaluation system was the impact which the delay in the extraction of the evaluation results had on effectiveness and efficiency. Another problem was the difficulty of the assessment process, which seems to have been very long and detailed. The KLD Inspectorate did not have sufficient resources to develop the process effectively. Finally, it is worth highlighting that the former evaluation system mainly addressed the professional performance of judges, assigning little importance to their ethical performance.
- ¹⁷These laws are: 1) Law no. 84/2016 "On the temporary reassessment of judges and prosecutors"; 2) Law no. 95/2016 "On the organization and operation of institutions to fight corruption and organized crime"; 3) Law no. 96/2016 "On the status of judges and prosecutors"; 4) Law no. 97/2016 "On the organization and the functioning of the Prosecutor's Office in the Republic of Albania"; 5)

Law no. 98/2016 "On the organization and functioning of the judicial power in the Republic of Albania"; 6) "Law no. 99/2016 "For some additions and changes in law no. 8577, dated 10.2.2000 "On the organization and functioning of the Constitutional Court of the Republic of Albania"; 7) Law no. 115/2016 "On governing bodies in the justice system".

¹⁸The Strategy of the School of Magistrates of the Republic of Albania is available here: <https://rm.coe.int/strategy-som-2019-2023/16809eb828>

¹⁹Based on Article B of the Annex to the Albanian Constitution: https://www.eeas.europa.eu/delegations/albania/most-frequently-asked-questions-international-monitoring-operation-imo_en

²⁰The IQC register for public denunciations: <https://kpk.al/regjistri-i-denoncimeve/>

²¹Special Appeals Chamber, reporting section: <https://kpa.al/denonco/>

²²Media on the numbers reported by the public, July 2024: <https://shqiptaria.com/lajm/ekskluzive-qytetaret-vune-drejtisi-ndihmuan-vettingun-te-fundose-te-gjyqtarwt-e-prokurorwt-e-korruptuar>

²³More information is available on the official website of the Delegation of the European Union to Albania:

https://www.eeas.europa.eu/delegations/albania/international-monitoring-operation_en?s=214

²⁴More information is available here: https://www.eeas.europa.eu/delegations/albania/most-frequently-asked-questions-international-monitoring-operation-imo_en?s=214

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²⁶Meljana Bregu & Juliana Gjinko: "The Impact of the European Union on the Endorsement of the Justice Reform in Albania", May 2024.

²⁷Fjori Sinoruka: "Albania approves new judiciary map despite lawyers' opposition". July 2022, BalkanInsight. Available at:

<https://balkaninsight.com/2022/07/21/albania-approves-new-judiciary-map-despite-lawyers-opposition/>

²⁸Parliament passes the establishment of the Special 'Anti-corruption' Commission: <https://www.reporter.al/2024/05/30/ps-voton-e-vetme-komisionin-kontrovers-te-antikorrupsionit/>

²⁹Blerina Gjoka: "Spurned by Stakeholders, Albanian Govt's Anti-Graft Initiative Unravels", October 2024, BalkanInsight. Available at: <https://balkaninsight.com/2024/10/08/spurned-by-stakeholders-albanian-special-reform-initiative-dead-in-the-water/>

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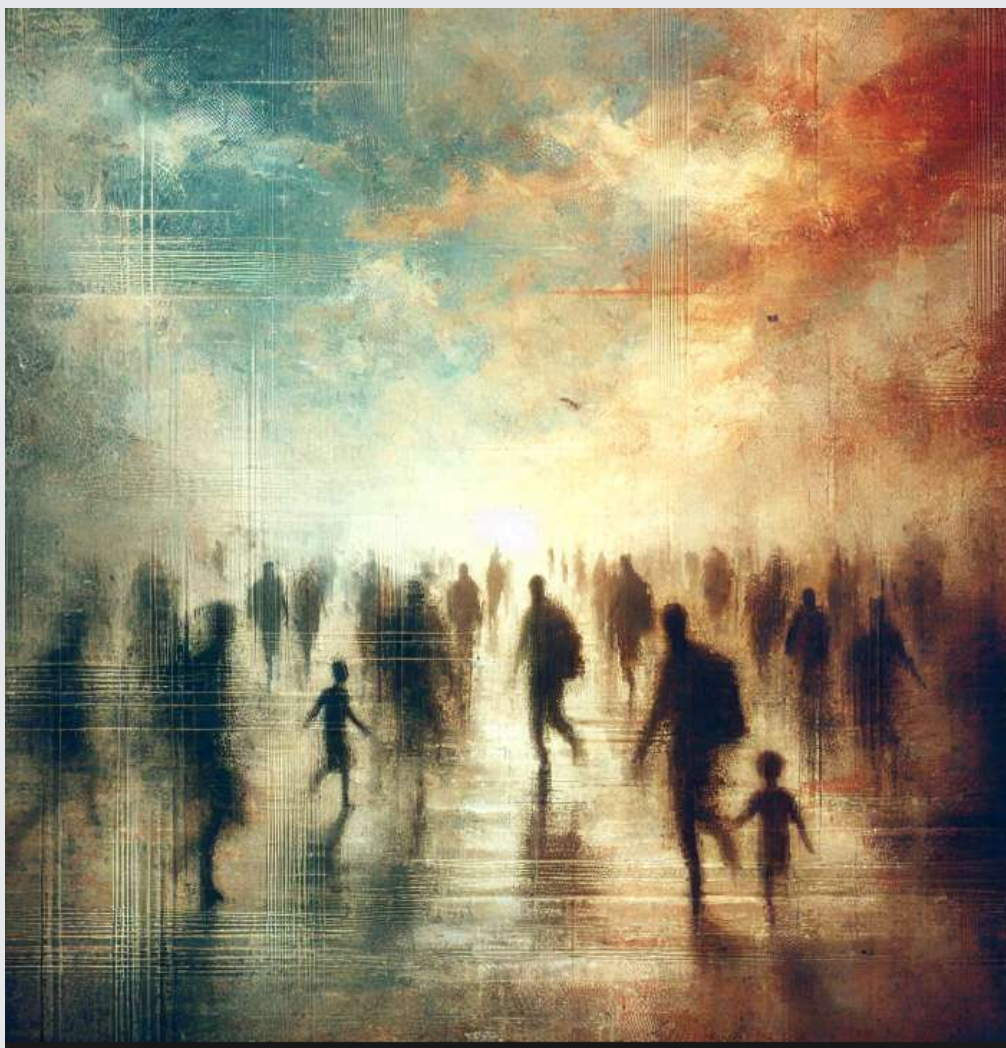
Migration Trends in Greece: Key Developments and Challenges in 2023 – 2024

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Executive Summary

This Working Paper provides an in-depth analysis of migration trends, asylum processes, integration policies, and legislative developments in Greece, covering data from 2023 and the first nine months of 2024. It examines key demographic changes, policy shifts, and challenges shaping Greece's migration governance.

One of the most pressing issues remains Greece's population decline, driven by low birth rates, increased mortality, and emigration. Between 2011 and 2021, the country's permanent population decreased by 383,805, with net emigration (-156,339) and natural decline (-227,466) as primary drivers. At the same time, the migration population decreased by 16.1% compared to 2011 census, while the employed migration work force dropped by 55% between 2011-2023 (from 375,000 to 170,000). It is estimated that approximately 250,000 people of migrant origin have left the country in mid-2010'. As of September 2024, 816,790 legally residing immigrants accounted for 7.79% of the total population, with Albanians (57.5%) remaining the dominant group, followed by Chinese nationals (6.1%).

Meanwhile, migration pressures have intensified. In 2023, 46,095 arrivals were recorded, a 169.22% increase from 2022. This upward trend persisted into 2024, with 37,049 new arrivals by September, represented a 25% increase from the same period in 2023. Specifically, arrivals on the Aegean Island surged by 94% between January and August 2024 (compared to 2023), though they declined by 33.81% in September 2024. The majority of new arrivals originated from Syria (10,930), Afghanistan (7,071), and Egypt (3,530), with women and children comprising 42%. Additionally, UAMs accounted for 17% of arrivals, with mostly of them from Somalia, Afghanistan, and Syria. Overall, the number of unaccompanied and separated children has seen a dramatic increase, from 1,490 in 2023 to around 3,000 in 2024.

However, despite rising arrivals, returns remained significantly lower, continuing the negative balance trend of the previous year. In 2024, only 5,280 deportations were carried out, compared to 37,049 new arrivals, mirroring the pattern from 2023 (5,140 returns vs. 29,714 arrivals). At the same time, the number of in-camp residents on the Greek islands dropped 35%, with Lesbos (-71.41%) and Kos (-30.44%) seeing the largest decreases. Consequently, the asylum system has faced mounting pressure, with applications rising by 40.03% (50,039 cases) between January and September 2024. Syrians (28.7%) and Afghans (20.3%) led these applications while transfers from the islands to the mainland increased by 121.16% compared to 2023. Simultaneously, irregular arrivals rose by 24.69%, yet returns remained persistently low (5,280 vs. 37,049 arrivals).

Greece has continued to provide support for displaced Ukrainians, issuing 26,848 temporary protection permits by December 2023, which increased to 31,781 by September 2024. Importantly, temporary protection was extended until March 2025, ensuring legal residency, employment access, and essential rights for beneficiaries.

The European Court of Human Rights (ECHR) has found Greece guilty of carrying out systematic pushbacks of asylum seekers, marking a significant ruling in the context of the country's migration policy. It was the first time that Greece has been publicly condemned for carrying out a policy it has long denied, and the first time the human rights court has examined a complaint of pushback by authorities in the country. As a response to these allegations, Greece introduced a new Complaints Mechanism aimed at enhancing protection for TCNs and strengthening oversight of human rights violations.

Regarding naturalization trends, 13,875 foreign nationals acquired Greek citizenship in 2023, an increase from 13,259 in 2022. Notably, second-generation applicants accounted for 50.84% of these naturalizations, reflecting a slight decline from 51.79% in 2022.

On the legislative front, the Immigration Code (Law 5038/2023) introduced electronic applications for issuing and renewing resident permits, flexible permit types, and investment-based permits. Furthermore, a new regularization program granted three-year residence, and work permits to undocumented migrants, addressing labor shortages in agriculture, construction, and tourism. This permit allows access to employment, family reunification, and potential naturalization. Applications opened on February 9, 2024, and close on December 31, 2024. By year-end, 43,625 applications had been submitted, with 9,314 receiving temporary permits, 27,351 under review, and 6,298 rejected. Despite initial estimates, the total number of regularized migrants falls far below the projected 300,000.

Despite Greece's long-held slogan that it pursues a "strict but fair" migration policy, the country struggles to balance border security with its humanitarian obligations amid growing irregular migration pressures. While regularization remains an important tool, bilateral agreements with third countries can help address labor market needs and strengthen migration

diplomacy. To ensure long-term success, Greece needs to improve these agreements by improving administrative procedures, strengthening worker protection, and recognizing skills. In terms of integration, Greece's efforts have been rated "Equality on Paper" (MIPEX), highlighting significant gaps in the integration of refugees and migrants. Although progress has been made in access to the labour market and education, fragmented implementation and the absence of a comprehensive inclusion strategy continue to hinder effectiveness.

Introduction

This Working Paper provides an overview of the latest trends and developments in international migration flows and policies in Greece. It presents comprehensive data and policy insights covering the entirety of 2023 and the first nine months of 2024, offering valuable context for identifying emerging migration patterns.

The analysis explores the composition and socio-demographic characteristics of the immigrant population in Greece, examining its size, distribution, and labour market participation. Special attention is given to the flows and stock of asylum seekers and irregular migrants, particularly those entering through Greek- Turkish sea and land borders.

Additionally, the report highlights key policy developments in migration and asylum policy during 2023- 2024, addressing the challenges and priorities Greece faces in managing migration and integration policies.

The report is structured into six chapters:

Chapter 1 provides a broad overview of recent migration trends, drawing on the statistical data to analyze the size, composition, and main characteristics of the migrant population, including their participation in the labour market.

Chapter 2 examines the presence of asylum seekers and refugees, assessing their size, demographic profile, and legal status. It also covers asylum applications, Dublin cases, relocation efforts, the decongestion of the Aegean Islands, and transfers to the mainland, with a particular focus on unaccompanied minors (UAMs).

Chapter 3 addresses irregular migration flows, returns, and readmissions, providing insights into deportation procedures, detention policies, fast-track asylum processes, and push-back allegations.

Chapter 4 focuses on the reception and integration of Ukrainian refugees in Greece, outlining specific policies and measures implemented to support this group.

Chapter 5 examines the reception system, accommodation schemes, and broader integration policies for asylum seekers and refugees. Special emphasis is placed on the housing and protection of unaccompanied minors.

Chapter 6 discusses policy and legislative developments, including citizenship acquisitions, racism and xenophobia.

1. The Migration Population in Greece

The 2021 Census underscores a notable decline in Greece's population, primarily driven by lower birth rates among Greek women, increased mortality, and emigration of Greek citizens.¹ While emigration remained below 100,000 (Table 1), its impact was still significant. Specifically, the Greek population saw a decrease of 422,007, largely due to a natural decline of 326,658 and emigration totaling 95,349. In contrast, the foreign population expanded by 38,202, as a natural increase of 99,192 that surpassed emigration figures of 60,990. Looking at the broader picture, between 2011 and 2021, Greece's permanent population shrank by 383,805, a result of both natural decline (-227,466) and net emigration (-156,339).

Table 1: Resident population by sex, age, and citizenship, 2021

CITIZENSHIP	Total	SEX		AGE GROUPS			
		Male	Female	0-24	25-49	50-74	75+
GREECE TOTAL	10,482,487	5,125,977	5,356,510	2,467,326	3,385,106	3,423,531	1,206,524
Greek	9,716,889	4,736,290	4,980,599	2,295,945	3,007,737	3,219,132	1,194,075
EU countries except Greece	116,669	41,776	74,893	19,588	50,852	42,156	4,073
European countries outside EU	439,254	216,022	223,232	98,643	216,386	118,484	5,741
Countries of Africa	33,471	21,667	11,804	9,592	18,086	5,589	204
Countries of the Caribbean, South or Central America	3,565	1,125	2,440	394	1,846	1,244	81
Countries of North America	5,607	2,511	3,096	593	1,941	2,407	666
Countries of Asia	158,530	102,075	56,455	39,530	85,718	32,228	1,054
Countries of Oceania	1,494	641	853	138	483	720	153
Foreigners with undeclared citizenship	3,265	1,751	1,514	610	1,249	1,070	336
Stateless or unspecified citizenship	3,743	2,119	1,624	2,293	808	501	141

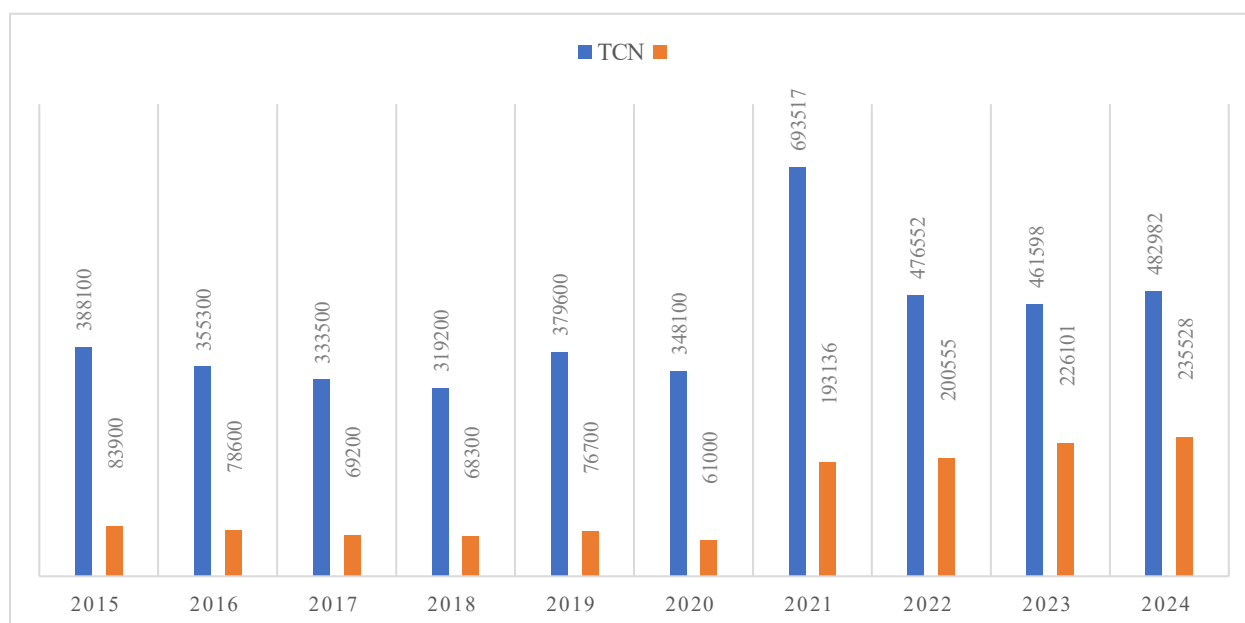
Source: 2021 Population Census, [ELSTAT](#)

Migration flow data from the 2021 National Census, published in August 2023, reveal that Greece is home to 765,598 individuals with foreign citizenship, representing a portion of the country's total population of 10,482,487, according to the Hellenic Statistical Authority (ELSTAT). ²

As of January 1, 2023, Greece's net migration was estimated at 16,355 individuals, reflecting the difference between 96,662 immigrants and 80,307 emigrants. Looking ahead, the net migration rate for 2024 is projected at -0.543 per 1,000 population, marking a 30.21% improvement compared to 2023. In contrast, the 2023 the net migration rate stood at -0.778 per 1,000 population, already showing a 15.98% improvement from 2022.³

According to the Ministry of Migration and Asylum's monthly and yearly reports, the number of third- country nationals residing in Greece as of September 2024 was 482,982, reflecting a slight increase of 4.63% compared to September 2023 (461,598) (Figure 1).⁴ When factoring in 77,750 beneficiaries of international protection, 235,528 EU citizens, and 20,530 co-ethnics, the total number of legally residing immigrants in the country is estimated at 816,790, which represents 7.79% of the country's total population. Additionally, between January and September 2024, 50,039 asylum applications were submitted,⁵ marking a substantial 29% increase from the 35,735 applications filed during the same period in 2023.⁶

Figure 1: Stock of foreign population in Greece (TCN and EU citizens), 2015-2024 (as of September)



Source: [Information Note on Migration September 2024, Ministry of Migration and Asylum](#)

According to migration and migrant population statistics published by Eurostat in March 2024, the non- national population residing in Greece as of January 2023 totaled 764,800, representing 7.3% of the country's total population.⁷ Of this group, 649,900 individuals (6.2%) were citizens of non-EU countries, while 114,900 individuals (1.1%) were citizens of EU member states, underscoring the diverse composition of Greece's non-Greek population.

Data from the 2024 Labour Force Survey (2nd Quarter) reveals a 10.69% decrease in the total foreign population (aged 15 and over), with 264,900 foreign citizens residing in the country in 2024 (2nd Quarter), compared to 296,600 in 2023 (3rd Quarter).⁸ However, despite this decrease, the foreign population, which includes both third-country nationals (TCNs) and EU-27 citizens, accounted for 8.10% (848,571) of Greece's total resident population in September 2024 (Table 2). This marks 1.9% increase compared to September 2023, when the foreign population represented 7.2% (758,016) of the total.

Table 2: Stock of foreign population in Greece, 2024 (as of September 2024)

	Size of immigrant stock	% of total resident population
Total TCN population	592,513	5.65
Total EU27 countries' citizens (non-Greek)	235,528	2.25
Total recognized refugees	77,750	0,74
Total expatriates	20,530	0.20
Total Residence Permits of Temporary Protection	31,781	0.30
Total immigrant stock	848,571	8.10
Total population in Greece	10,482,487*	100.00

Sources: [Monthly Information Note September 2024 - Ministry of Migration and Asylum](#) /*2021 Population Census Data published in August 2023

A closer look at the valid residence permits for TCNs, as detailed in the September 2024 report from the Ministry of Migration and Asylum (Table 3), reveals a steady rise of 3.19% in the number of TCNs, increasing from 468,038 in December 2023 to 482,982. This upward trend is further underscored by a 4.63% increase in the total number of valid residence permits in September 2023,⁹ compared to the same period in the previous year.

Table 3: Valid resident permits for third-country nationals by gender, 2015-2024

Valid resident permits TCNs	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Men	298.800	303.289	291.785	286.774	286.886	282.426	n/a	n/a	n/a	n/a
Women	273.569	276.447	264.801	257.669	260.045	255.466	n/a	n/a	n/a	n/a
Total	572.369	579.736	556.586	544,43	546.931	537.892	693.517	476.552	468,038	482.982

Sources: Table compiled by the authors on the basis of data for 2015 provided by the Ministry of Migration Policy, database of permits for TCNs upon request, while data for 2016-2023 are available online. **Note:** Data refer to 31 December of each year. Data for 2020 refer to 30 April. Data for 2024 refer to 30 September 2024.

Composition and Features of the Immigrant Population

In terms of the composition of the migration population, Albanians make up the largest group, comprising and estimated 57.5% of Greece's foreign population. Chinese nationals follow as the second-largest group, accounting for 6.1% of the foreign population (Table 4). Over recent years, the number of Chinese citizens in Greece has steadily risen, with China moving from third place in 2021 (3.9%) to second place in 2022 (4.9%) and 2023 (5.7%), marking a 0.8% increase from the previous year. This positive trend has continued into the first nine months of 2024, with a further 0.4% increase. Following closely are the Pakistani, Georgian, and Bangladeshi communities, which rank as the third, fourth, and fifth largest immigrant groups, representing 4.6%, 4.1%, and 3.1% of the foreign population, respectively. These trends, as outlined in a September 2024 report by the Ministry of Migration and Asylum, paint a clear picture of the evolving diversity within Greece's immigrant population.¹⁰

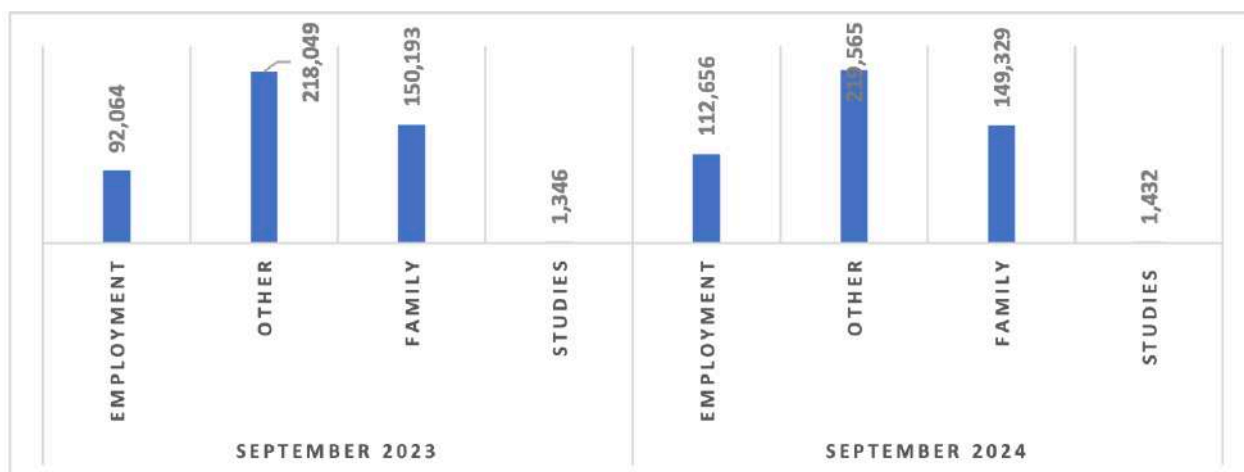
Table 4: National Composition of the Migrant Population (top 10 nationalities)

Country of Origin	Population		TCN valid permits 2022 -2023			
	Census 2011 Number	Census 2021 Number	on 31.12.2023		on 31.09.2024	
			Number	Percentage	Number	Percentage
Albania	480,851	374,296	278,745	59.6	277,478	57.5
China	n/a	n/a	28,358	6.1	29,651	6.1
Pakistan	34,178	35,309	19,157	4.1	21,995	4.6
Georgia	27,407	26,083	19,456	4.2	19,849	4.1
Bangladesh	11,333	17,189	10,566	2.3	15,119	3.1
Russia	13,809	13,415	14,854	3.2	14,550	3.0
Ukraine	17,008	16,408	13,613	2.9	13,781	2.9
Egypt	10,455	n/a	9,906	2.1	10,710	2.2
India	11,333	n/a	9,129	2.0	9,621	2.0
Philippines	9,807	n/a	7,022	1.5	8,226	1.7

Sources: [Information Note December 2023](#), [Information Note September 2024](#), Ministry of Migration and Asylum, & [National Census 2021](#), data published in August 2023.

As of September 2024, the total number of valid residence permits in Greece has reached 482,982, reflecting a 4.63% increase from September 2023 (461,598). When breaking down the permits by purpose, as detailed by the Greek Ministry of Migration and Asylum, the largest category is "other," with 219,565 permits. Following this, "family reunification" comes in second, with 149,329 permits, while "employment" ranks third, with 112,656 permits (Figure 2).

Figure 2: Stay permits by purpose (September 2023 - September 2024)



Source: [Information Note September 2024](#), Ministry of Migration and Asylum

A comparison of the 2024 data with 2023 reveals a slight decline in residence permits issued for "family reunification," with a reduction of 864 permits (-0.58%). In contrast, permits issued for "other" purposes saw a modest increase of 1,516 (+0.70%), while those granted for "employment" experienced a significant rise of 20,596 (+22.39%), signaling an upward trend in these categories (Figure 2).

Over the past three years, the strategic investor permit scheme has attracted approximately 97,375 individual permanent investors and their family members (Table 5). As of September 30, 2024, a total of 46,350 beneficiaries, including their family members, held this type of permit, comprising 10,257 renewals and 36,093 first issuances. This represents an 11.2% increase compared to the residence permits issued in 2023 and a 31.5% rise compared to 2022.

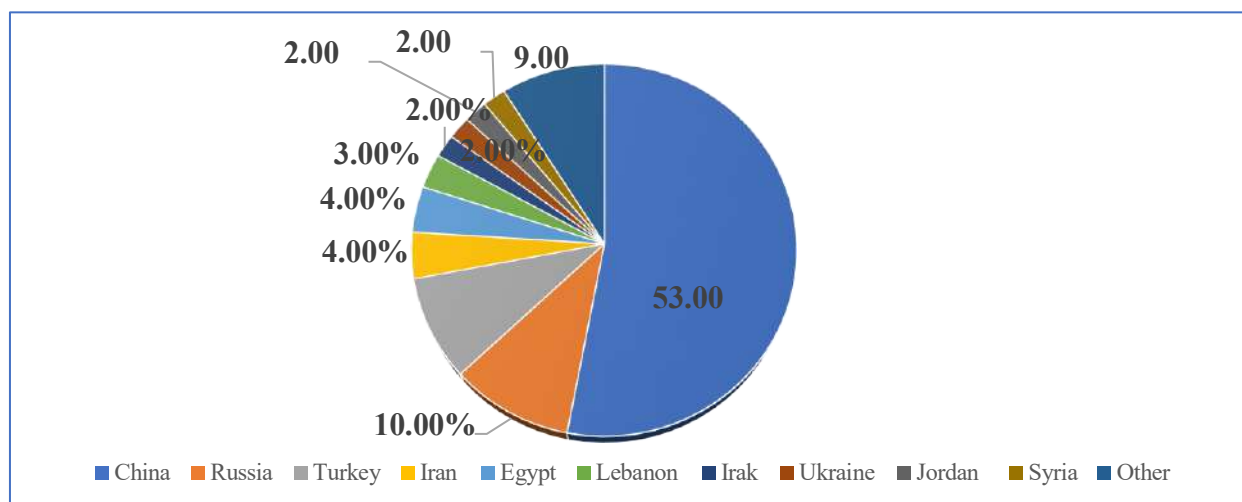
Table 5: Permanent residence permits for investment 2022-2024

Type of resident permit	2022			2023			2024 (as of September)		
	Permanent Investor	Family Member	TOTAL	Permanent Investor	Family Member	TOTAL	Permanent Investor	Family Member	TOTAL
Permanent residence permits for investment (Golden Visa) – FIRST ISSUANCE	9,802	17,834	27,636	12,126	21,520	33,646	12,742	23,297	36,093
Permanent residence permits for investment (Golden Visa) – RENEWAL	1,630	2,481	4,111	3,035	4,461	7,496	4,172	6,085	10,257

Sources: [Information Note December 2022](#), [Information Note December 2023](#) & [Information Note September 2024](#), Ministry of Migration and Asylum

In terms of nationalities, the majority of beneficiaries of the Golden Visa scheme in September 2024 were from China, with 6,820 beneficiaries - a slight decrease of 1.54% compared to September 2023 (6,927). China was followed by Turkey with 1,067 beneficiaries and Lebanon with 708 beneficiaries. As shown in Figure 3, Chinese nationals accounted for nearly 53% of the total investors under the Golden Visa scheme in Greece as of September 2024.

Figure 3: Top 10 ethnicities with Golden Visas, September 2024

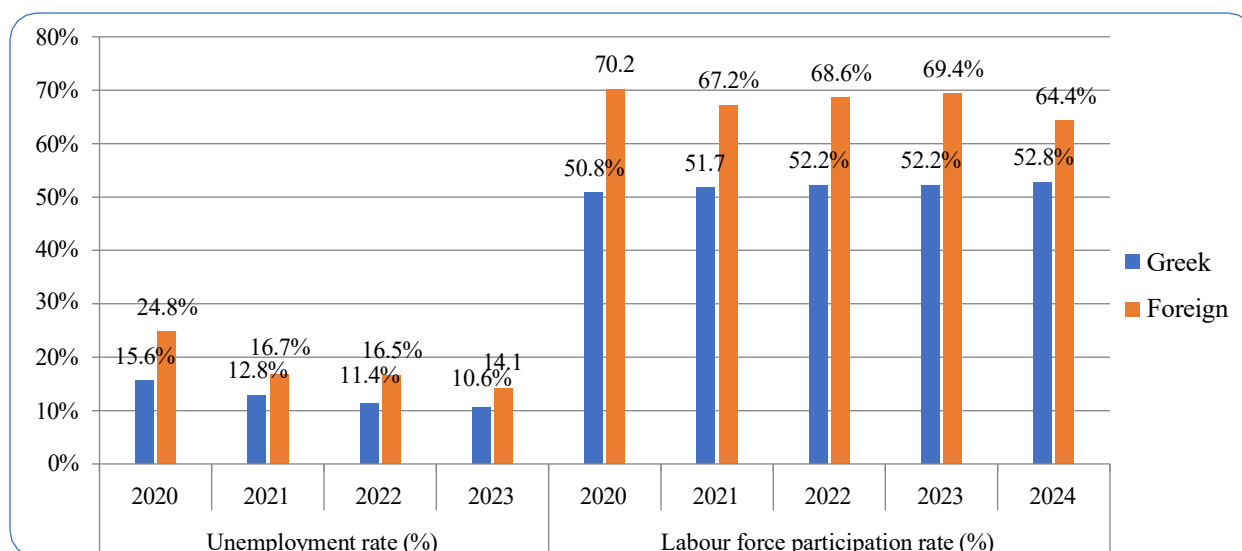


Source: [Information Note B September 2024](#), Ministry of Migration and Asylum

Immigrant Labour Market Participation

In Greece in 2023, the labour force participation rate among the foreign population was 69.4%, compared to 52.2% for the Greek population.¹¹ By the second quarter of 2024, the labour force participation rate for foreigners had decreased to 64.4%, a decline of 5.0%. This reduction narrowed the gap between the Greek and foreign labour force rates by 11.6% (Figure 4).¹²

Figure 4: Rate of participation in labour market (%), 3rd Quarters of 2020, 2021, 2022, 2023 and 2024



Sources: Graph compiled by the author on the basis of the Hellenic Statistical Authority (EL.STAT.) Labour Force Survey, 3rd Quarter of [2020](#), [2021](#), [2022](#), [2023](#) & 2nd Quarter of [2024](#)

According to the Labour Force Survey, in the second quarter of 2024, the highest labour force participation rate was observed among men, aged 30-44 years of foreign citizenship.¹³ During the same period, the majority of employed individuals were working as employees (69.3%), while a significant share of the labour force has self-employed (19.5%). Part-time employment accounted for 6.5% of the labour force, and individuals in temporary jobs comprised 11% of the total active labour force. Additionally, part-time employment decreased by 0.1% compared to the 3rd quarter of 2023 and by 0.7% compared to the 3rd quarter of 2022.¹⁴

Regarding unemployment, Greece had an unemployment rate of 10% in September 2023, the second highest in Europe after Spain's 12%. By June 2024, Greece's unemployment rate decreased to 9.6%, remaining second after Spain, which recorded 11.5%.¹⁵ Additionally, in Greece the seasonally-adjusted unemployment rate showed a slight improvement, dropping from 10% in September 2023 to 9.3% in September 2024. This remains notably higher than the euro area's average, which stood 6.3% in September 2024, down from 6.5% in September 2023.¹⁶ In Greece, the seasonally-adjusted youth unemployment (under 25s) reached its lowest point in September 2024 at 16.3%, a significant decrease of 3.1% compared to 19.4% in September 2023. Despite this improvement, Greece's youth unemployment remained higher than the EU average, which stood at 14.3% in September 2024.¹⁷ As for the migrant unemployment rate, it reached 14.9% in the first nine months of 2024, 0.8% points higher than in September 2023.¹⁸

Legal Developments in Greece's Immigration and Labour Framework

The new Immigration Code (Law 5038/2023) introduces several key changes to the entry and residence for non-EU nationals in Greece,¹⁹ aimed at streamlining administrative procedures and aligning with EU directives, such as Directive 2021/1883/EK. Though originally scheduled to take effect on January 1, 2024, some provisions were delayed allowing for administrative adjustments. The Code introduces several notable updates, particularly regarding residence permits for work and investment purposes:

1. Electronic submission of applications: the Code validates the process of electronically submitting applications for granting and renewing residence permits via the Ministry of Immigration's platform. Upon submission, applicants receive a digital certificate, which remains valid until a decision is issued regarding the residence permit.
2. Flexibility in residence permit types: TCNs already residing legally in Greece with a residence permit or national visa can now request a change in the type of residence permit they hold provided under the new Code.
3. Abolition of the residence permit for executives: the residence permits for executives under Law 4251/2014 have been replaced by a new permit under the investment purposes category. This applied to shareholders of companies with a paid-in capital of at least €500,000, and board members of companies or branches with assets or turnover exceeding €4,000,000.
4. Residence permits for investment purposes: the Code revises requirements for investment-related residence permits, though the Golden Visa scheme for real estate investment remains largely unchanged. Key updates include maintaining a minimum investment of €250,000 for real estate in select areas, as long as 10% of the purchase price was paid by July 31, 2023, and extending the deadline for completing property purchase until December 31, 2023.
5. Second-generation immigrants: the Code introduces enhanced rights for second-generation immigrants born and raised in Greece. These include a 10-year residence permits, double the previous five-year validity, and eligibility for young adults who have lived in Greece and completed three years of schooling by age 23 to apply for a residence permit if they pursue vocational training or university studies.
6. Financially independent persons: the residence permit for this category has been redefined as the "residence permit for TCNs with sufficient resources." Effective on April 1, 2024, this permit is valid for three-year and can be renewed for an equal period.

To ensure a smooth transition to the new regulations, the following deadlines were set:

- The Migration Information System was updated by March 31, 2024.
- The payment deadline for Golden Visa applications based on real estate purchases was extended to April 30, 2024, for those who paid at least 10% of the purchase price by July 31, 2023.

Additionally, the Code addresses Greece's domestic labour shortages, particularly in sectors reliant on seasonal workers.²⁰ Key provisions for seasonal workers, introduced in 2023 and include:

- A streamlined process for seasonal workers to enter and reside in Greece.
- Seasonal workers are permitted to stay for up to nine months within a twelve-month period, an extension from previous regulations.
- Employers must ensure adequate living conditions for seasonal workers and provide proof of employment.

In April 2023, the Ministry of Labor set the maximum number of seasonal workers for the 2023-2024 period.²¹ Of the 167,925 positions available:

- 20,000 were allocated through bilateral agreements with Egypt and Bangladesh.
- 147,925 were allocated to various sectors, with the majority (113,467 or 76.7%) designated for the primary sector.

Within the primary sector:

- 91,630 positions were allocated to seasonal work lasting 3 to 9 months.
- 16,572 positions were for dependent work lasting 12 months.
- 5,265 positions were for Egyptian fishermen, under a bilateral agreement, for a maximum duration of 11 months.

In December 2023, Law 5078/2023 authorized residence permits for TCNs for employment purposes under Article 103.²² The residence permit is valid for three years and can be extended or converted into a different category upon expiration. This provision is designed to address labor shortages by formalizing employment opportunities for individuals who have already established residency in the country.²³

On March 20, 2024, Joint Ministerial Decision No. 95391/20-03-2024 introduced specific provisions for digital nomads, requiring applicants to provide evidence of remote work and sufficient financial resources.²⁴

At the 88th Thessaloniki International Fair in September 2024, Prime Minister Kyriakos Mitsotakis announced Golden Visa updates²⁵ designed to attract foreign investment. These updates include:

- Investments in Greek startups can ensure a five-year residence permit by investing a minimum of €250,000 in a qualifying Greek startup.
- Real estate investment now requires a minimum of €800,000 in high-demand areas.
- Properties purchased through the scheme can no longer be leased as short-term rentals.

Regarding employment rights, Law 5053/2023²⁶ preserves employees' rights during business transfer, ensuring their employment contracts remain intact.²⁷ This law also introduces key changes including:²⁸

- A maximum probationary period of six months.
- On-demand contracts, guaranteeing a minimum number of paid working hours to ensure job security for employees.

To address labor shortages, particularly agriculture, bilateral agreements have been prioritized.²⁹ As for the agreement between Greece and Egypt,³⁰ an electronic platform has been launched on June 10, 2024, and hosted on the website of Greece's Migration and Asylum Ministry that enables employers in Greece to submit applications for hiring Egyptian seasonal workers.

2. Asylum Seekers and Refugee Status

In 2023, 46,095 people arrived in Greece, 28,973 more than in 2022 (17,122) or a 169.22% increase in registered arrival flows in 2023. The total number of arrivals in the first nine months of 2024 is 37,049 recording an increase of 25% comparing to the same period in 2023 (29,714).³¹ Furthermore, the flows of arrivals to the Aegean islands for September 2024 show to have decreased by -33.81% compared to the corresponding one in 2023(11,470) (Table 9).³²

Table 6: Arrival Flows, January 2023 - September 2024

Month & Year	KOS	LESVOS	SAMOS	CHIOS	LEROS	OTHER ISLANDS	FYLAKIO EVROS	TOTAL
January 2023	356	550	272	67	71	56	292	1,664
February 2023	105	219	230	37	47	66	137	841
March 2023	35	639	116	140	6	24	257	1,217
April 2023	22	495	0	66	2	100	253	938
May 2023	79	539	63	78	4	68	530	1,361
June 2023	200	261	29	155	68	315	1,301	2,328
July 2023	319	1,352	211	145	3	548	744	3,322
August 2023	717	1,548	1,236	174	133	1,574	1,190	6,572
September 2023	356	3,639	3,168	469	17	2,944	877	11,470
October 2023	1,361	1,013	1,192	284	0	2,567	877	6,863
November 2023	960	1,268	151	248	50	1,394	513	4,584
December 2023	1,129	1,522	800	190	0	754	539	4,934
Total 2023	5,639	13,045	7,468	2,053	401	10,410	7,079	46,095
January 2024	311	1,403	527	342	116	262	322	3,283
February 2024	477	1,816	369	545	38	222	361	3,828
March 2024	522	348	396	224	18	317	406	2,231
April 2024	174	362	368	255	97	641	596	2,493
May 2024	208	323	678	299	67	1,627	544	3,746
June 2024	138	410	317	164	36	1,305	557	2,927
July 2024	266	390	433	205	161	2,420	821	4,696
August 2024	529	478	565	518	210	3,086	867	6,253
September 2024	200	801	978	488	264	3,790	1,071	7,592
Total 2024 (as per September)	2,825	6,331	4,451	3,040	1,007	13,670	5,545	37,049

Sources: [Information Note December 2023](#) and [Information Note September 2024](#). Ministry of Migration and Asylum statistics.

According to UNHCR statistics, in August 2024, there was an increase in arrivals on the islands with 6,037 people arriving, in contrast to July when 4,319 individuals had arrived. The number of arrivals between January and August 2024 has increased by 94% compared to the same period in 2023.³³ The majority of new arrivals were received by the Dodecanese islands, accounting for 39% of the total, followed Lesvos at 20 %, Samos at 14 %, Chios at 10%, and other Islands at 17%.³⁴ Most of new arrivals in 2024 are from Syria (10,93), Afghanistan (7,071), and Egypt (3,530). As in the previous year, the majority of arrivals from Afghanistan come in family groups. Almost half of the population were women (16%) and children (26%), while 58% of the arrivals were men.³⁵ In 2023, one-fifth of arrivals are children, whereas in 2022, the proportion was one-third. Of those, almost 6 out of 10 were below the age of 12. Moreover, 17% of all children were registered upon arrival as unaccompanied or separated, mainly from Somalia, Afghanistan and Syria. Approximately 53% of the arrivals are men between the ages of 18 and 39, while only 3% are aged 50 years or older.

While there was a negative balance of returns to arrivals in 2023 (5,140 departures compared with 29,714 arrivals)³⁶, this trend continued during the first nine months of 2024, when there was a negative balance with 37,049 arrivals compared with 5,280 departures.³⁷

Compared to September 2023, the number of in-camps residents on the islands decreased in September 2024 by 35%, compared to the corresponding month of 2023, with Lesbos and Kos experiencing the highest decrease, at 71.41% and 30.44%, respectively (Table 7).³⁸

Table 7: Residents on the Islands (September 2023 - September 2024)

TOTAL RESIDENTS	KOS	LESVOS	SAMOS	CHIOS	LEROS	TOTAL + OTHER ISLANDS
September-23	2,385	5,075	4,264	986	2,355	15,143
October-23	3,900	4,253	3,915	1,029	2,713	15,824
November-23	3,882	4,958	3,503	1,040	2,612	16,056
December-23	3,387	5,545	3,905	1,094	2,192	16,139
January-24	3,041	6,072	4,003	1,031	1,840	15,997
February-24	1,965	4,532	2,921	1,116	950	11,488
March-24	1,570	3,317	2,559	1,085	1,001	9,571
April-24	1,191	2,755	2,380	1,138	854	8,348
May-24	1,083	1,848	2,361	628	1,128	7,051
June-24	1,288	1,409	2,269	567	1,004	6,577
July-24	1,670	991	1,743	499	1,129	6,066
August-24	1,690	1,190	2,258	1,010	1,949	8,154
September-24	1,659	1,451	3,258	1,010	1,949	8,154
Difference from 30/09/2022	-30.44%	-71.41%	-23.59%	2.43%	-17.24%	-45.15%

Source: Information Note September 2024, Ministry of Migration and Asylum

As for the transfers of asylum seekers from the islands to the mainland, they decreased by 5% in September 2024 compared to the corresponding month of 2023 (Table 8).³⁹

Table 8: Transfers from the Islands to the mainland September 2023 - September 2024

	KOS	LESVOS	SAMOS	CHIOS	LEROS	OTHER ISLANDS	TOTAL
September 2023	606	1,741	687	292	246	399	3,971
September 2024	910	81	475	395	737	1,162	3,760

Source: Information Note September 2024, Ministry of Migration and Asylum Statistics

The number of asylum applications accepted in 2023 was 24,975 (24,323 in 1st instance and 665 as of 2nd instance). In the first nine months of 2024 the number of asylum applications accepted was 30,138 (29,731 as of 1st instance and 407 as of second instance), thus 20.67% bigger compared to 2023 (Table 9).

Table 9: Recognition of refugee status 1st and 2nd Instances, 2016-2024 (as of September)

TOTAL DECISIONS ON REFUGEE STATUS ISSUED IN THE LAST FIVE YEARS		
YEAR	Recognition of Refugee Status (1 st Instance)	Recognition of Refugee Status (2nd Instance)
2016	2.451	6
2017	9.298	80
2018	12.616	180
2019	13.522	312
2020	26.333	480
2021	13,040	730
2022	18,718	665
2023	24,323	652
2024	29,731	407
TOTAL	150,019	3,512
TOTAL FOR BOTH INSTANCES	153,531	

Sources: [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum

Meanwhile, the total number of asylum applications from January to September 2024 were 40.03% (50,039) higher than the application for refugee status lodged from January to September 2023 (35,735).⁴⁰ The 92.52% of the overall applications (86,846) in the period September 2023 - September 2024 were first-time applications while 7.48% second-time applications.⁴¹

As of September 2023, a total of 629 decisions of subsidiary protection status were issued, including 448 at the 1st instance and 181 at the 2nd instance. In the first nine months of 2024, only 330 subsidiary protection status decisions were issued, making a significant decrease of 47.54% compared to the same period in 2023 (629) (Table 10).⁴²

Table 10: Recognition of Subsidiary Protection Status, 2016-2024 (as of September)

TOTAL DECISIONS OF SUBSIDIARY PROTECTION STATUS ISSUED THE LAST FIVE YEARS		
YEAR	Protection Status (1st Instance)	Protection Status (2nd Instance)
2016	249	1
2017	1,045	43
2018	2,573	94
2019	3,843	311
2020	7,943	565
2021	3,528	1,133
2022	514	394
2023	590	221
2024 (as of September)	244	86

TOTAL	20,533	23,381
TOTAL FOR BOTH INSTANCES	23,381	

Source: [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum

On the other hand, the number of pending decisions decreased by 13.65%, from 25,043 in September 2023 to 21,625 in September 2024 (Table 11).⁴³

Table 11: Pending decisions 1st and 2nd Instances, January 2023 - September 2024

MONTH	PENDING WILLS	PENDING DECISIONS, A' INSTANCE	PENDING DECISIONS B' INSTANCE	PENDING DECISIONS TOTAL	- DIFFERENCE (%)	DECISIONS A' INSTANCE	DECISIONS B' INSTANCE
Jan-23	186	17,472	4,932	22,590	1.23%	4,047	1,281
Feb-23	65	16,942	4,434	21,441	-5.09%	3,516	1,881
March-23	36	15,637	3,910	19,583	-8.67%	4,460	1,642
April-23	24	16,030	3,372	19,426	-0.80%	2,517	1,329
May-23	0	16,154	3,157	19,311	-0.59%	648	444
June-23	0	15,643	2,185	17,828	-7.68%	3,880	1,605
July-23	0	17,067	1,937	19,004	6.60%	2,687	975
Aug-23	0	20,271	1,935	22,206	16.85%	3,391	710
Sep-23	0	23,011	2,032	25,043	12.78%	5,657	727
Oct-23	0	25,363	1,916	27,279	8.93%	8,350	1,029
Nov-23	0	28,594	1,896	30,490	11.77%	7,810	875
Dec-23	0	29,885	2,845	32,730	7.35%	5,454	589
Jan-24	0	29,066	2,960	32,026	-2.15%	7,386	1,008
Feb-24	0	28,915	2,633	31,548	-1.49%	6,203	1,461
March-24	0	27,362	2,731	30,093	-4.61%	5,777	1,076
April-24	0	22,645	2,906	25,551	-15.09%	9,110	1,153
May-24	0	19,431	4,476	21,907	-14.26%	6,735	1,050
June-24	0	18,265	2,643	20,908	-4.56%	6,346	1,019
July-24	0	17,885	3,160	21,045	0.66%	6,845	1,098
Aug-24	0	18,208	3,622	21,830	3.73%	6,555	857
Sep-24	0	18,441	3,184	21,625	-0.94%	6,966	1,468

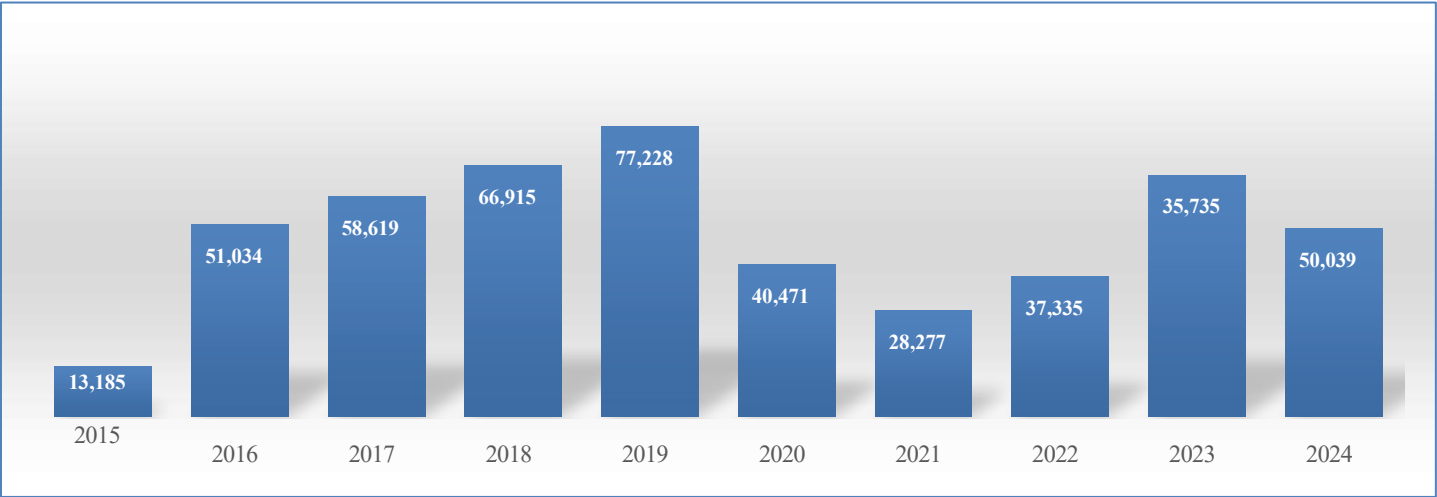
Source: [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum

Overall, asylum applications from January to September 2024 were up 40.03% (50,039) compared to January-September 2023 (35,735). ⁴⁴ A total of 86,846 asylum applications (80,352 of 1st instance and 6,494 of 2nd instance) were accepted in the first nine months of 2024, which marked 63.76% increase compared to the same period in 2023 (33,813 in total). The Asylum Service issued positive decisions for 48.4% of the total applications at the 1st instance and 5% at 2nd instance, respectively, while in September 2023 the respective positive decisions stood at 40% (1st instance). In addition, a comparison of data from September 2023 and September 2024 shows a significant overall decrease of 13.65% in pending cases, dropping from 25,043 in September 2023 to 21,625 in September 2024. Notably, pending 1st-instance decisions fell by 19.86%, while pending 2nd-instance decisions increased by 56.69%. Finally, during the first nine months of 2024, refugee status and subsidiary protection were granted to a total of 838 UAMs. ⁴⁵

Asylum Applications

The developments discussed briefly above have had a visible impact on Greece’s asylum system in the form of an increase of 40.03% in asylum applications in September 2024 (50,039) compared with the same period of 2023 (35,735) (Figure 5). ⁴⁶

Figure 5: Lodged Asylum Applications, 2016 - September 2024



Source: [Information Note on Asylum, September 2024](#), Ministry of Migration and Asylum

Of 50,039 applications been lodged as of September, 58% of them on the islands and 42% on the mainland. ⁴⁷

In relation to the applicants’ nationalities in 2023, the most applications were lodged by Syrians (21.8%), followed by Afghans (14.8) and Palestinians (10.5) (Table 12). As of September 2024, the Syrian along with Afghanis headed the list by 28.7% and 20.3% respectively, while Egyptians, Turkish and Palestinians follow with 10.1%, 6.5% and 3.7%, respectively. Apparently, the situation regarding the applications by country of origin has changed slightly in 2024 comparing with 2023 since new countries such as Nepal and Yemen are entering the list of top ten nationalities. At the same time, the application from Egyptian and Turkish nationals have seen an increase compared to 2023. ⁴⁸

Table 12: Asylum applications by country of origin, 2023 & 2024 (as of September)

Country of origin	2023	Country of Origin	2024 (as of September)
syria	14,015	Syria	14,360
afghanistan	9,488	Afghanistan	10,073
Palestine	6,736	EGYPT	5,073
iraq	6,455	TURKEY	3,245
pakistan	4,077	PALESTINE	1,872
Somalia	2,935	PAKISTAN	1,798
tyrkey	2,714	IRAQ	1,693
Egypt	2,498	Eritrea	1,475
ERITREA	1,826	NEPAL	1,149
congo (DRC)	1,528	YEMEN	1,119
Other	11,940	Other	8,091
Total	64,212	Total	50,093

Sources: [Information Note on Asylum Dec.2023](#) & [Information Note on Asylum September 2024](#)

It is interesting to highlight the shift in the nationalities of asylum seekers. In 2019-2022 Afghans (rather than Syrians) topped of list of those applying for asylum in Greece with 23,828, 11,514, 4,618, and 5,624 applications, respectively. This can be interpreted in the light of the developments in Syria that period, as well as the likelihood of asylum seekers being returned to Turkey based on the “safe third country” concept. In 2023 and 2024 Syrian are dominating again the list.

In 2023, 52,314 first-instance decisions were issued, while a total of 61.923 decisions were issued in the first nine months of 2024.⁴⁹ In September 2023, the number of positive decisions stood at 17.358 (11,906 recognitions of refugee status plus 448 subsidiary protections), which represented 62.2% of the overall asylum applications lodged for the seven first months of 2023.⁵⁰ For the same month in 2024, the number of positive decisions stood at 39,513 (29,731 recognitions of refugee status plus 244 subsidiary protections), which represented 48.8% of the overall asylum applications lodged in the nine first months of 2024 (Table 13).⁵¹ A year-on-date comparison for 2023 and 2024 reveals that first-instance asylum decisions in 2023 shows there were 24,975 decisions, 5,599 more compared to 2022. The upward trend continued in the first nine months of 2024. In September 2024, there were 30,138 decisions, 5,163 more compared to 2023.

Table 13: Asylum applications by country of origin, 2023 & 2024 (as of September)

TOTAL DECISIONS ON REFUGEE STATUS ISSUED OVER THE LAST SEVEN YEARS		
YEAR	Recognition of Refugee Status (1st Instance)	Recognition of Refugee Status (2nd Instance)
2016	2,451	6
2017	9,298	80
2018	12,616	180
2019	13,520	312
2020	16,333	480
2021	13,036	730
2022	18,711	665
2023	24,323	652
2024 (as of September)	29,731	407
TOTAL	150,019	3,512
TOTAL FOR BOTH DEGREES	153,531	

Source: [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum (Table 11a)

Regarding pending asylum decisions (first- and second instance), in September 2023 there were 25,043 pending decisions, 510 higher compared to the 24,993 decisions in September 2022 (Table 14). In September 2024, there were 21,625 pending decisions, 3,418 less compared to September 2023.

Table 14: Pending asylum decisions from January 2023 to September 2024

MONTH	PENDING DECISIONS 1st INSTANCE	PENDING DECISIONS 2nd INSTANCE	PENDING DECISIONS - TOTAL	DIFFERENCE (%)
Jan-23	17,658	4,932	22,776	
Feb-23	17,007	4,434	21,506	-5.58%
March-23	15,673	3,910	19,619	-8.77%
April-23	16,054	3,372	19,450	-0.86%
May-23	16,154	3,157	19,311	-0.71%
June-23	15,643	2,185	17,828	-7.68%
July-23	17,067	1,937	19,004	6.60%
Aug-23	20,271	1,935	22,206	16.85%
Sep-23	23,011	2,032	25,043	12.78%
Oct-23	25,363	1,916	27,279	8.93%
Nov-23	28,594	1,896	30,490	11.77%
Dec-23	29,885	2,845	32,730	7.35%
Jan-24	29,066	2,960	32,026	-2.15%
Feb-24	28,915	2,633	31,548	-1.49%
March-24	27,362	2,731	30,093	-4.61%
April-24	22,645	2,906	25,551	-15.09%
May-24	19,431	2,476	21,907	-14.26
June-24	18,265	2,643	20,908	-4.56%
July-24	17,885	3,160	21,045	0.66%
Aug-24	18,208	3,622	21,830	3.73%
Sep-24	18,441	3,184	21,625	-0.94%

Source: [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum

Unaccompanied Minors

According to the data provided by the Ministry of Migration and Asylum, there were 1,987 UAMs in Greece in December 2023, of whom 84% were boys and just 16% girls.⁵² Ten months later, in October 2024, 1,973 were UAMs in Greece.⁵³ Disaggregated by nationality, the estimated UAM population on 1st October 2024 breaks down as follows: 45% Egyptians, 18 % Syrians, 12% Afghans, 11% Somalia, 4% Pakistani and 11 % other nationalities. Comparing these figures to those from 1st October 2023, the number of UAMs from Afghanistan and Pakistan in October 2024 has fallen by 11% (from 23% in October 2023), and 7% (from 11%), while those from Syria and other countries have been risen by 34% (from 11%).⁵⁴

The Voluntary Relocation program for UAMs launched by the EU Commission in March 2020 and coordinated by the Special Secretariat for the Protection of Unaccompanied Minors, part of the Ministry of Immigration and Asylum, was completed in March 2023. By March 2023, more than 1,368 UAMs had been relocated in Europe.⁵⁵

Dublin Cases & Relocation

In 2023, 121 Dublin transfers to other EU member states took place in the framework of Dublin Regulation, marking a significant decrease compared to 2022. This trend continued in the first nine months of 2024, when only 103 Dublin transfer cases took place. Similarly, there were only 103 Dublin transfers recorded in the first nine months of 2024. Additional obstacles to family reunification under Dublin continued to occur in 2023 and 2024 due to restrictive practices⁵⁶ adopted not only in Greece but by several receiving Member States, which may undermine the right to family life.⁵⁷

As per the relocation program, their numbers stand at 690, in 2023, among them 55 UAMs. During the first nine months of 2024, 970 individuals were relocated to other EU Member States. None of them belonged to the category of UAM. This corroborates a clear downward trend comparing to 2021 and 2022 when 3,571 individuals were relocated to other EU member states under the same scheme.

Transfers to the Mainland

A total of 3,760 asylum seekers were transferred to the Greek mainland in September 2024, marking a small downward trend comparing to 3,971 transfers in September 2023,⁵⁸ while over the whole 2023, the total number of transports stood at 25,736. All in all, the transfers of asylum seekers from the Aegean islands to the Greek mainland have marked an exponential increase of 121.16% comparing with the same period in 2023 (11,354).

Legal Developments in Greece's Asylum Policies & Protection of UAMs

The 2023-2024 developments in Greek asylum policies mark significant strides towards a more streamlined approach to migration management. A key development is the introduction of three-year residence permits for foreign nationals who, as of November 30, 2023, have resided continuously in Greece for at least three years without holding a valid permit. Furthermore, the waiting period for asylum-seekers to gain the right to work has been reduced, from six months to 60 days following the submission of their asylum applications.⁵⁹

On the other hand, the Code (Law 5038/2023) introduced specific provisions for UAMs, including the ten- year residence permit provided they meet two key conditions: completing at least three years of Greek schooling by the age of 23 and gaining admission to vocational training, apprenticeship, or university-level institutions.⁶⁰ Despite the progress made, human rights groups such as the Greek Council for Refugees (GCR) have criticized the Code, arguing that many UAM might struggle to meet the schooling criteria.

The Presidential Decision 77/2023 (Government Gazette A' 130/27-06-2023) represents a critical advancement in Greece's commitment to safeguarding UAMs and other vulnerable groups through the establishment of the General Secretariat for Vulnerable Persons and Institutional Protection.⁶¹ This newly formed body holds the mandate of planning, implementing, and supervising the National Strategy for the protection of UAMs, alongside other at-risk individuals, including TCNs and stateless persons. Beyond its administrative role, the General Secretariat assumes responsibility for the accommodation and relocation of UAMs through coordinating referrals, facilitating their transition to appropriate housing. Finally, Joint Ministerial Decision No. 137051/May 2, 2024, set rules for the operation and licensing of centers that accommodate UAM in Greece.⁶² Complementing this, the Joint Ministerial Decision No. 111204/April 7, 2024, introduces a framework of standard operating rules for supervised apartments dedicated to the semi-autonomous living of UAM.

3. Irregular Migration Flows, Return and Readmissions

According to Hellenic Police statistics, the total number of apprehended TCNs for irregular stay and employment in Greece, in 2023, was 16,606 of whose 16,561 were apprehended for irregular stay and 45 for irregular employment (Table 15).

Table 15: TCNs apprehended for irregular stays and employment, 2023

Month	Irregular Stay	Irregular Employment	TOTAL
January	1,190	0	1,190
February	1,333	5	1,338
March	1,182	6	1,188
April	1,198	5	1,203
May	1,380	0	1,380
June	1,778	0	1,778
July	1,963	2	1,965
August	1,848	1	1,849
September	1,573	15	1,588
October	1,424	1	1,425
November	985	8	993
December	707	2	709
TOTAL	16,561	45	16,606

Source: Greek Police Database, December 2023⁶³

The total is smaller than in 2022, when 22,739 individuals were apprehended (22,572 for irregular stays and 167 for irregular employment).⁶⁴ Meanwhile, there are no available data for the nationalities of the TCNs apprehended by the Greek Police in 2023.

Returns and Deportations

Regarding the inflows, their numbers in the first nine months of 2024 appear to have been 24.69% (37,049) higher than in the first nine months of 2023 (29,714).⁶⁵ However, a significant number of those arrivals have since left the country because of expulsions, returns and relocations. Overall, during the first nine months of 2024 there were 5,280 departures compared with 37,049 arrivals as of September 2024, whereas in September 2023 there were 5,140 departures compared with 29,714 arrivals.⁶⁶

In the first nine months of 2024, 1,654 IOM returns were recorded compared to 1,486 in the first nine months of 2023; voluntary departures stood at 582 in September 2024, compared with 410 in the corresponding period in 2023. This marks an increase of 11.31% (returns) and 41.95% (voluntary departures).⁶⁷

According to the statistics on returns made available by the Ministry of Migration and Asylum in December 2023, Greece recorded 6,340 returns of irregularly staying persons, including TCNs and EU citizens (Table 16). Of those, 2,892 were forced returns carried out via bilateral or EU readmission agreements; 742 were voluntary departures following the issuance of a return decision, and 2,706 were assisted voluntary returns organized by the International Organization for Migration (IOM).

Table 16: Returns by Category, January 2023 & 2024 (as of September)

Month 2023/Category	Forced Return	Voluntary Return	ASR/IOM	Total
January	191	56	276	523
February	168	49	226	443
March	295	46	243	584
April	254	52	155	461
May	292	75	220	587
June	248	69	167	484
July	227	63	199	489
August	275	58	346	679
September	266	67	34	367
October	227	78	360	665
November	244	56	271	571
December	205	73	209	487
Total for 2023	2,892	742	2,706	6,340
Month 2024/Category	Forced Return	Voluntary Return	ASR/IOM	Total
January	199	44	198	441
February	227	70	155	452
March	205	59	172	436
April	298	61	150	509
May	230	64	180	474
June	194	79	124	397
July	199	54	249	502
August	237	79	213	529
September	182	72	213	467
Total for 2024 (as of September)	1,971	582	1,654	4,207

Sources: [Information Note on Asylum December 2023](#) & [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum

In the first nine months of 2024, Greece recorded 4,207 returns of irregularly staying persons. Of those, 1,971 were forced returns carried out via bilateral or EU readmission agreements; 582 were voluntary departures following the issuance of a return decision, and 1,654 were assisted voluntary returns organized by IOM.⁶⁸

Regarding returns, in Greece, in 2022 it was in place the “The Assisted Voluntary Return and Reintegration of Migrants in situations of vulnerability” project is implemented under the program “Asylum and Migration” of the EEA Grants by IOM.⁶⁹ In the context of this project, migrants willing to return to their home country could receive pre-departure counseling to better prepare their return and reintegration, support on the issuance of travel documents, and travel assistance.

Legal and Institutional Development 2023 – 2024

In March 2023, the European Border and Coast Guard Agency (Frontex) Executive Director alongside the then Greek Minister of Migration and Asylum and the Minister of Citizens' Protection, reached an agreement to expand the agency's role in assisting Greece with migrant to returns.⁷⁰ However, this effort comes amid serious allegations regarding pushback practices. In April 2022, the United Nations Special Rapporteur on the Human Rights of Migrants reported that "pushbacks at both land and sea borders have become de facto general policy".⁷¹ The European Court of Human Rights further escalated the issue, issuing a landmark ruling on July 7, 2022, condemning Greece's practice of forcibly pushing boats carrying asylum seekers back to Turkey.⁷² The Court ruled that the Greek authorities failed to act in accordance with their duty to protect lives, highlighting a lack of thorough investigation into the boat sinking incident, which led to the loss of lives.⁷³ This ruling marked a significant step in the legal accountability of Greece's migration practices.⁷⁴

Tragedy struck again on June 15, 2023, when a migrant boat sank off the coast of Greece, claiming at least 78 lives. Survivors of the incident, numbering 40, filed a criminal complaint demanding a thorough investigation into the causes of the sinking and the authorities' response.⁷⁵

One of the most tragic incidents occurred on June 14, 2023, when a shipwreck near Pylos resulted in the deaths of more than 600 people, with only 104 survivors.⁷⁶ Investigations into the actions and omissions of the Hellenic Coast Guard, which allegedly contributed to the disaster, have not yet led to significant accountability. Human Rights Watch and Amnesty International have highlighted the need for a thorough investigation and prosecution of any officials found responsible.⁷⁷

As part of broader efforts to address these issues, Greece's Commission for Human Rights launched the Recording Mechanism of Informal and Forced Returns in early 2022. According to the Interim Report published in January 2023,⁷⁸ at least 50 incidents were recorded between April 2020 and October 2022, involving over 2,000 individuals, including asylum seekers and recognised refugees.⁷⁹

The Second Annual Report, published in June 2024,⁸⁰ offers a detailed examination of informal forced returns from January to December 2023. The report highlights 45 incidents that affected 1,438 victims, including women, children, and individuals with special needs. These victims were subjected to forced returns under coordinated operations involving uniformed and plainclothes individuals, as well as the use of heavy vehicles and watercraft. The report underscores the systematic nature of these operations and the broad impact on vulnerable populations. In the light of these findings, the report calls for greater accountability, transparency, and strict adherence to human rights standards.

4. Ukrainian Refugees

Persons who were permanently resident in Ukraine and fled the country after 24 February 2022 are entitled to temporary protection in the EU with a 90-day visa being provided on entrance.⁸¹ Under this regime, Ukrainian citizens can enter Greece with their passports and immediately apply for temporary protection.⁸²

By December 2023, a total of 26,848 temporary protection permits cards had been issued to displaced Ukrainians, of whom 18,487 were to women and 8,361 to men.⁸³ In 2023, a total of 32,640 Ukrainian citizens arrived in Greece (Table 17).

Table 17: Arrival of Ukrainian citizens in Greece, January-December 2023

Ukrainians arriving in Greece (Monthly)	Jan. 2023	Feb. 2023	March 2023	April 2023	May 2023	June 2023	July 2023	Aug. 2023	Sep. 2023	Oct. 2023	Nov. 2023	Dec. 2023	TOTAL
	188	184	172	154	157	138	129	141	122	125	132	121	1.763

Source: [Monthly Information Notes from January to December 2023](#), Ministry of Migration and Asylum

By September 2024, a total of 31,781 temporary protection permits cards had been issued to displaced Ukrainians of whom 22,222 were to women and 9,559 to men (Table 18).⁸⁴

Table 18: Arrival of Ukrainian citizens in Greece, January-September 2024

Ukrainians arriving in Greece (Monthly)	Jan. 2024	Feb. 2024	March 2024	April 2024	May 2024	June 2024		July 2024	Aug. 2024	Sep. 2024	TOTAL
	119	123	140	191	161	125		121	116	115	1,211

Source: [Information Notes published from January to September 2024](#), Ministry of Migration and Asylum

In view of providing temporary protection for displaced people from Ukraine, the EU Council Implementing Decision (EU) 2022/382 of 4 March 2022 established the existence of a mass influx of displaced persons from Ukraine by the meaning of Article 5 of Directive 2001/55/EC and introduced temporary protection.⁸⁵ Following the Communication from the Commission on operational guidelines for the implementation of Council Decision (2022/C 126 I/01), a Decision of the Minister of Migration and Asylum No 131035/04.03.2022 was issued and activated (P.D. 80/2006), while a Ministerial Decision of the Minister of Migration and Asylum No 172172/28.03.2022 specified the procedure for granting temporary protection.

Electronic pre-registration for temporary protection of displaced Ukrainians is available on the website of the Ministry of Migration and Asylum since March 2022. The platform provides Ukrainian citizens residing in Ukraine the opportunity to declare their basic personal data and receive a special appointment in person at the Regional Offices of the Asylum Service, to receive temporary status protection.⁸⁶

In February 2024, the Greek Ministry of Migration and Asylum issued a Ministerial Decision,⁸⁷ extending the temporary protection status for displaced Ukrainians until March 4, 2025. This measure ensures that Ukrainian refugees can continue to reside legally in Greece with access to work permits and essential rights. The temporary protection status, initially set to expire in March 2024, has been extended for an additional year.⁸⁸ As a result, residence permits under this status that were to expire in March 2023, September 2023, or March 2024 are automatically extended until March 2025.⁸⁹ Furthermore, new temporary protection residence permits will continue to be issued to displaced persons from Ukraine who will enter Greece for the first time until March 4, 2024. It is noted that all the temporary protection residence permits with a date of issue from 24/3/2022 to 4/3/2024 constitute a title of legal residence in the country with access to labour market, conferring the rights of articles 128 to 131 of the 4939/2022.⁹⁰

Furthermore, Ukrainian nationals, beneficiaries of temporary protection, will be able to receive all the services of the HELIOS program, such as integration courses in specialized centers throughout Greece, employment support and housing support, including rent subsidies. Significant changes are also being made to the accommodation criteria of HELIOS such as an increase in the subsidy of rent by 30% and the extension of the duration of the subsidy for all beneficiaries (until today 6-12 months) to 12 months for all.⁹¹

5. Reception System, Accommodation, Integration

In September 2024, a total of 9,768 migrants and asylum seekers were accommodated in Reception and Identification Centres (RICs) across the Greek islands (Table 19), a notable decrease of -35.41% comparing to September 2023 (15,123) (Figure 6).⁹²

Table 19: Migrants and Asylum Seekers accommodated in RICs, 2023 & 2024 (as of September)

TCNs Resident	Reception and Identification Centres (RICs)					TOTAL *
	KOS	LESVOS	SAMOS	CHIOS	LEROS	
September-2023	2,385	5,075	4,264	986	2,355	15,123
October-2023	3,900	4,253	3,915	1,029	2,713	15,824
November-2023	3,882	4,958	3,503	1,040	2,612	16,056
December-2023	3,387	5,545	3,905	1,094	2,192	16,139
January-2024	3,041	6,072	4,003	1,031	1,840	15,997
February-2024	1,965	4,532	2,921	1,116	950	11,488
March-2024	1,570	3,317	2,559	1,085	1,001	9,571
April-2024	1,191	2,755	2,380	1,138	854	8,348
May-2024	1,083	1,848	2,361	628	1,128	7,051
June-2024	1,288	1,409	2,269	567	1,004	6,577
July-2024	1,670	991	1,743	499	1,129	6,066
August-2024	1,690	1,190	2,258	1,010	1,949	8,154
September-2024	1,659	1,451	3,275	1,176	2,171	9,768
Difference from September 2023	-30.44%	-71.41%	-23.19%	19.27%	-7.81%	-35.41%

Sources: [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum - *other islands are also included

Figure 6: TCNs resident in RICs, January 2023 - September 2024



Source: [Information Note A on Asylum September 2024](#), Ministry of Migration and Asylum

Regarding the distribution of migrants and asylum seekers by region, there was a significant decrease in most regions in the period September 2023 - September 2024. In September 2023, 30,535 TCNs residents were distributed across thirteen regional units of Greece, compared with 22,578 TCNs in the same month of 2023.⁹³ In September 2024, there were 22,578 TCNs resident distributed across the thirteen regional units of Greece, with North Aegean regional unit accommodating the largest number of migrants and asylum seekers (Table 20).

Table 20: Distribution of migrants and asylum seekers by region, September 2023 - September 2024

Regional Unit	TCNs Resident 2023 (as of September)	% of total population	TCNs Resident 2024 (as of September)	% of total population
NORTH AEGEAN	10,170	5.24%	5,726	2.95%
SOUTH AEGEAN	4,707	1.45%	3,802	1.17%
EPIRUS	1,771	0.55%	1,156	0.36%
MAINLAND GREECE	2,515	0.50%	2,216	0.44%
CENTRAL MACEDONIA	5,322	0.30%	4,013	0.22%
EAST MACEDONIA AND THRACE	1,408	0.25%	1,343	0.24%
PELOPONNESE	712	0.13%	507	0.09%
ATTICA	3,245	0.09%	3,269	0.09%
WEST GREECE	545	0.08%	310	0.05%
THESSALY	143	0.02%	236	0.03%
WEST MACEDONIA	0	0.00%	0	0.00%
IOANIAN ISLANDS	0	0.00%	0	0.00%
CRETE	0	0.00%	0	0.00%
TOTAL	30,535	0.29%	22,578	0.22%

Sources: [Information Note on Asylum September 2023](#) & [Information Note on Asylum September 2024](#), Ministry of Migration and Asylum

Under the Helios Programme, 43,962 and 44,624 TCNs were had registered in the program during, respectively, the 1st and 2nd quarters of 2023; between the 3rd and 4th quarters of 2023, a higher number of TCNs were registered, with 45,220 in the third, and 45,250 in the fourth quarters of 2023. (Table 21). This trend continued in 2024 with a total of numbers of registration standing at 141,287 in the 1st, 2nd, and 3rd quarters of 2024.

Table 21: Registration at Helios Programme

REGISTRATIONS AT HELIOS	
1 st quarter of 2022	35,001
2 nd quarter of 2022	35,896
3 rd quarter of 2022	40,020
4 th quarter of 2022	42,728
1 st quarter of 2023	43,962
2 nd quarter of 2023	44,624
3 rd quarter of 2023	45,220
4 th quarter of 2023	45,250
1 st quarter of 2024	46,276
2 nd quarter of 2024	47,258
3 rd quarter of 2024 (until 31 August 2024)	47,753

Source: [Information Note on Asylum September 2024](#), of Migration and Asylum.

As per nationality, 26.2% of those registered on the Helios Programme are from Syria, 25.9% from Afghanistan, 14.8% from Ukraine, and 10.1% from Iraq.⁹⁴ Another category under the accommodation scheme includes the beneficiaries of the rent housing programme whose numbers reached 2,013 in November 2023⁹⁵, while in the first 3 quarters of 2024 (till 30/09/2023) their numbers was decreased by 62.44% (756 in total).⁹⁶ Finally, the category of TCNs beneficiaries of the rent subsidising programme reached 23,327 in the first three quarters of 2023 (till 30 September 2023), while in the same period of 2024 their numbers were higher by 5.07% with 24,510 TCNs benefiting from this accommodation programme.⁹⁷

Accommodation and Protection of UAMs

On 1 October 2024, there were 60 operational UAM Accommodation Facilities with a total capacity of 1,537 places, 58 semi-Independent living apartments with a total capacity of 230 places, and 4 emergency accommodation facilities of a total capacity of 155 places.⁹⁸ In the same period, out of a total of 1,973 UAMs (91 % boys, 9 % girls and 16 % below 14 years old), 1,242 were in long-term or temporary accommodation facilities, 166 in semi-autonomous accommodation apartments, 154 in emergency accommodation facilities, 334 in RICs, and 77 in controlled accommodation facilities for asylum seekers.⁹⁹

According to a data provided by the Special Secretariat for the Protection of Unaccompanied Minors during 2023, the Special Secretariat handled 5,051 requests for accommodation for unaccompanied minors, ensuring a maximum occupancy of 4,009 accommodation places. Furthermore, in the context of the voluntary relocation scheme more than 1,368 children were transferred in 12 countries across Europe.¹⁰⁰

In terms of protection, the General Secretariat of Vulnerable Citizens and Institutional Protection of the Ministry of Migration and Asylum started on August 2, 2023, the pilot application of a new Toolkit within the framework of the "Harmonization, Establishment and Certification of Best Interest Procedures" program, with the aim of establishing standard tools and harmonizing procedures assessment of the best interests of the child.¹⁰¹ This Toolkit consists of the following:

- 1) Theoretical and Legal Framework for the Best Interest of the Child,
- 2) Guidelines and Methodology for the Best Interest Assessment Process,
- 3) Short Best Interest Assessment Form with Instructions for its Completion, and
- 4) Analytical Best Interest Assessment Form with its Instructions.

The "Harmonization, Establishment and Certification of Best Interest Procedures"¹⁰² program has been implemented since November 2022, in collaboration with the UNHCR and the European Union Agency for Asylum.

6. Political and Institutional Developments

The Ministry of Migration and Asylum in Greece underwent several leadership changes during 2023 and 2024, reflecting ongoing adjustments to address evolving migration and asylum policies. During this period, the Ministry focused on several priority areas, including:

- Regional distribution mechanism by developing a system for the equitable distribution of migrants and refugees across Greece.
- Integration programs by implementing programs to support the social and economic integration of migrants and refugees.
- Continued digitization by expanding digital services to improve efficiency in migration and asylum procedures.
- Strengthening institutional frameworks by enhancing the legal and administrative structures supporting vulnerable populations.

An important development in December 2023 was the introduction of new legislation for undocumented migrants. Greece's Parliament approved a law granting three-year residence and work permits to undocumented migrants who had resided in Greece for at least three years as of November 30, 2023. The application deadline for these permits is December 31, 2024.

Concluding, between 2023 and 2024, the Greek government has implemented policy reforms in the areas of migration, asylum, and investment-based residence permits. These changes reflect Greece's strategic efforts to:

- Regularize undocumented migrants by addressing labour shortages and enhancing employment rights, ensuring a more structured and legally compliant workforce.
- Strengthen institutional support for vulnerable populations, particularly UAM's, refugees, and second-generation immigrants, through improved legal frameworks and social integration measures.
- Adapt the Golden Visa program to encourage sustainable investment, while implementing measures to prevent speculative real estate purchases, ensuring long-term economic stability.

As part of the administrative restructuring of immigration program management in Greece, Presidential Decree No. 20, issued on February 24, 2023, abolished the Directorate General for Coordination and Management of Immigration Programs and Internal Affairs. Its responsibilities were redistributed to other relevant departments and agencies with the objective of enhancing coordination and management by integrating these functions into existing structures with better resources and capabilities. However, the decision faced strong criticism from the opposition, which argued: "*The abolition of a key Directorate responsible for managing the €2 billion European financial fund for refugees during the 2021-2027 period and the concentration of its responsibilities directly under one individual raises significant concerns.*"

Citizenship Acquisitions

In 2023, a total of 13,875 foreign citizens acquired Greek citizenship through naturalization, up from 13,259 in 2022. The second-generation category - comprising individuals granted citizenship due to birth or study in Greece - accounted for 50.84% of the total, reflecting a slight decrease from 51.79% in 2022 (- 0.95%). This category had a significantly higher share in 2020 (66%), compared to both 2021 and 2022 (Table 22).

Regarding country of origin, Albanian nationals represented the largest group of successful applicants, totaling 10,181 (73.38%). In 2023, Albanian constituted 29.67% of Greek co-ethnics, 25.01% of foreigners, and 78.87% of second-generation applicants granted citizenship. This trend has been consistent across 2020, 2021, and 2022.¹⁰³

Table 22: Acquisition of Greek Citizenship by category (2020-2023)

Category	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Naturalizations of co-ethnics	15,791	8,563	7,476	3,726	2,937	1,117	1.463	1,198	1,158	1,433
Naturalizations of other nationalities	2,019	1,487	3,624	3,486	2.530	1,882	1.817	2,843	3,150	3,515
Birth or study in Greece	0,000	0,305	19,367	25,528	21,559	12,868	9.099	5,154	6,867	7,054
Other provisions	2,029	1,529	1,183	0,978	0,883	0,382	876	623	723	674
Under-age children of naturalized adults (parents)	1,990	2,294	1,837	1,096	0,501	0,585	547	777	1,136	1,199
Co-ethnics from countries of the former Soviet Union	-	-	-	13	190	100	71	9	225	-
Total	21,829	14,178	33,487	34,814	28,410	16,834	13.873	10,604	13,259	13,875

Source: [Ministry of Interior, Special Secretariat for Citizenship, Statistics 2023104](#)

The Greek government has introduced several decisions regulating the naturalization process for foreign nationals, defining requirement, examination procedures, and institutional adjustments. A key development is Decision No. 192/18.09.2023, which defines the examination process for obtaining the Certificate of Adequacy of Knowledge for Naturalization (PEGP). This certificate serves as a prerequisite for naturalization, assessing applicants on criteria such as lawful residence in Greece, proficiency in the Greek language, and demonstrated integration into Greek society.¹⁰⁵

Building on this framework, Decision No. 4555/B/5-8-2024, issued by the Secretary General for Citizenship, provides a detailed structure for the naturalization process, with a particular focus on the PEGP examination for TCNs applying for Greek citizenship.¹⁰⁶ It specifies the examination topics, format, location, registration procedures, and logistic guidelines.¹⁰⁷

To further strengthen the administration of these examinations, Decision No. 978/11-9-2024 revises the composition of the Committee responsible for organizing and conducting the PEGP exams, by modifying its membership and oversight responsibilities.

Racism and Xenophobia

In April 2024, the Racist Violence Recording Network (RVRN) in Greece released its 12th annual report, offering a comprehensive analysis of racist violence and bias-motivated harassment across the country in 2023.¹⁰⁸ The report documented 158 incidents of racist violence, with migrants, refugees, and asylum seekers being the most affected group, accounting for 89 cases primarily based on national origin, religion, or skin colour.

The report highlights the geographical distribution of racist violence, with particularly high concentrations along Greece's borders, where refugees and migrants remain highly vulnerable. Beyond physical violence, the findings underscore pattern of systemic racism, especially involving state representatives, as well as incidents occurring within schools and family environments, pointing to deeply ingrained discriminatory attitudes in Greece society.

A critical issue highlighted in the report is the barriers victims face in reporting racist crimes. Many individuals refrain from lodging formal complaints due to fear of retaliation, psychological trauma, and mistrust of authorities. This reluctance not only limits victims' access to justice but also contributes to the underreporting of hate crimes, obscuring the full scope of the issue.

To address these challenges, the report presents policy recommendations for the Greek government. Key proposals include strengthening legal frameworks to combat racist violence, enhancing victim protection mechanisms, and the improving institutional responses by law enforcement and the judiciary. Additionally, it underscores the need for education and awareness-raising initiatives to foster inclusivity, particularly within schools and public institutions.

Recognizing the need for stronger institutional safeguards, the Greek Ministry of Migration and Asylum has recently introduced a new Complaints Mechanism¹⁰⁹ aimed at addressing fundamental rights violations affecting TCNs.¹¹⁰ Overseen by the Fundamental Rights Officer, this mechanism provides a formal channel for individuals to report alleged abuses encountered during entry, reception, and asylum procedures.

7. Concluding Remarks

Between 2023 and 2024, Greece's migration landscape was significantly shaped by increasing migration flows, evolving policy reforms, and ongoing human rights concerns. While Greece's foreign population grew, partially offsetting some of population loss, the country still faced considerable challenges in managing labour migration and regularization programs, outward migration, irregular migration and asylum pressures.

One of the central issues was the increase in asylum applications, which more than doubled in 2023 compared to the previous year. Many of these applications were from first-time arrivals into the EU, indicating a rising number of individuals seeking protection. Alongside this, there was a notable increase in arrivals of minors, particularly UAMs, whose number doubled in 2024. This created additional strain on Greece's already stretched reception system. Relations with Turkey remained strained, particularly in light of ineffective readmission procedures for asylum seekers. Turkey's refusal to accept rejected asylum seekers has stranded many people in Greece, exacerbating the difficulties of managing migration. Despite a rise in asylum applications, return rates remain disproportionately low compared to arrivals.

On the human rights front, Greece faced condemnation from the European Court of Human Rights (ECHR) for systematic refoulement, a practice the government had long denied. This ruling underscored ongoing concerns about Greece's border enforcement practices. In parallel, search and Rescue (SAR) operations conducted by Frontex were also criticized, particularly after the tragedy in Pylos. Lack of coordination and unclear protocols for responding to maritime emergencies revealed significant gaps in ensuring the safety of migrants at sea. In addition, racist violence and systemic discrimination persist, with reports highlighting barriers to justice for victims. However, new accountability mechanisms, such as the Complaints Mechanism for Third-Country Nationals (TCNs), mark steps toward improved oversight and institutional transparency. Moreover, continued scrutiny of Greece's border enforcement practices, including pushbacks and migrant rights violations, remains a priority for domestic and international stakeholders.

Greece also faced labor market shortages, particularly in sectors such as agriculture, tourism, and construction. The legalization of undocumented migrants was intended to address the labor shortage, but return rates remained low, complicating efforts to effectively manage the influx, with the mismatch between migration policies and labor market needs has hampered efforts to effectively address these shortages. Public skepticism toward immigration, combined with gaps in integration, education, and opportunities, further complicated the country's approach to managing immigration. Finally, bilateral agreements with third countries aimed at addressing labor shortages have had mixed results. While these agreements have the potential to help, their success depends on improving administrative procedures, worker protection, and skills recognition for the effective integration of migrant workers into the Greek labor market.

In terms of policy, Greece modernized its immigration framework, implementing electronic permit applications and making residence status more flexible. The introduction of investment migration policies and the regularization of undocumented migrants were aimed at addressing labour shortages in key sectors such as agriculture, tourism, and construction. Despite these efforts, however, return rates remained disproportionately low compared to the number of arrivals complicating efforts to manage migration effectively.

In conclusion, these challenges highlight the complex interplay of political, humanitarian and economic factors that Greece faces in its efforts to manage irregular migration, while balancing the needs of the domestic labour market with its obligations under EU and international law.

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67 Supra.

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69 See: https://greece.iom.int/assisted-voluntary-return-and-reintegration-migrants-situations-vulnerability?fbclid=IwAR38TOZQYNqzz8byW7c8jOCEJgmWfMmPUP-39kBVt_GvZDSmIVGzZXfZLIHo and here: <https://migration.gov.gr/gas/d-o-m/>.

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75 See here: [Greece Launches Inquiry into Deadly Migrant Shipwreck - GreekReporter.com](#)

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77 See here: <https://www.nchr.gr/ta-nea-mas/1815-2023-10.html>.

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- 80 See here: https://nchr.gr/images/pdf/nea_epikairothta/deltia_tupou/2024/2023.pdf.
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From Migration Fears to Missed Opportunities: The Cost of Politicising EU Enlargement

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Introduction

The report “[*The rise of radical right and Eurosceptic political forces and the impact on the EU's enlargement policy*](#)” [1] monitors the party programmes and public discourse of key radical right parties in the EU, including Germany's AfD, France's RN, Spain's Vox and the Netherlands' PVV, to understand how they frame enlargement policy and their shifting stances on the question of future accessions to the EU.

Radical right parties have shaped their anti-enlargement stance by linking it to sensitive domestic issues, such as migration, national security, and fiscal/budgetary impact. For example, the AfD, RN, Austria's FPÖ, and Dutch PVV are capitalising on their countries' status as net contributors to the EU budget to frame enlargement as a potential economic and cultural burden.

This brief focuses on the question of migration as an argument of the radical right for opposing EU enlargement and provides recommendations for policymakers to counter these narratives and constructively engage with public opinion.

Key findings

Our analysis shows that of radical right parties tend to tie EU enlargement to migration, and particularly the alleged risk of influx of migrants as a result of the accession of new member states. Indicatively:

- **AFD (Germany)** has framed enlargement as a gateway for increased migration, particularly from candidate countries with significant Muslim populations such as Bosnia and Herzegovina. This aligns with the party's broader anti-migration platform, amplifying fears of cultural change.
- Marine Le Pen's **RN (France)** and key party figures, including its current leader MEP Jordan Bardella, have drawn explicit links between EU enlargement and the risk of illegal immigration and organised crime, mirroring the party's domestic focus on security and identity.
- Geert Wilders' **PVV (Netherlands)** has also linked enlargement to freedom of movement, emphasising the risks of "uncontrolled immigration" from poorer candidate states.
- **FPÖ (Austria)** ties its opposition to enlargement with its anti-migration stance, particularly focusing on Bosnia and Herzegovina and Kosovo due to their Muslim population. The party's rhetoric does not only highlight a broader opposition to migration but also the need for cultural preservation.
- Overall, migration from the Western Balkans is a recurring theme across different parties, frequently depicted as a potential cause of crime and social instability.

Our analysis also shows that several radical right parties, including **Vox (Spain)**, **SD (Sweden)**, and the **Finns Party (Finland)**, currently lack a strong stance on enlargement, but the issue is likely to gain prominence. As new accessions will draw closer in the coming years, more radical right parties are expected to weaponise the question of migration to frame enlargement as a threat to national interests.

Thus, EU enlargement is poised for further politicisation, partly due to the rising influence of eurosceptic radical right parties. This is not because parties are necessarily against enlargement per se but because the EU's expansion could have implications for areas at the core of their political agendas, such as migration and freedom of movement.

Implications

The threat of framing enlargement policy as a potential migration-affecting issue comes to meet an already volatile and challenging domestic landscape in many EU member states. Two key issues are of special concern: a) *Politicisation and national politics*, and b) *Public referenda*.

Politicisation and National Politics

The trajectory of EU enlargement hinges on political consensus among member states, where political will often outweighs technical or legal considerations in candidates for accession states. Currently, any major decisions impacting the functioning of the EU, including enlargement, require unanimous agreement from all member states.

The recent example of the Netherlands is quite telling of how national politics and coalition agreements can influence enlargement policy. In May 2024, the PVV entered a coalition with the centre-right VVD, the right-wing populist BBB, and

the centrist NSC. Even though the coalition agreement did not outright reject enlargement, it included strong language prioritising Dutch sovereignty, reflecting a critical stance towards future EU enlargement. [ii]

This serves as a tangible example of how radical right parties can influence the policy direction of governing coalitions, pushing centrist and other mainstream parties toward a more sceptical stance. It also highlights the broader trend of radical right rhetoric impacting mainstream politics. Thus, the importance of national politics in shaping EU enlargement decisions cannot be overstated.

Poland's recent handling of Ukrainian agricultural imports is another example of how domestic pressures can lead even pro-European and pro-enlargement governments to adopt increasingly hardline stances. In April 2024, under the pressure of public and farmer protests, the pro-European government of Poland pushed for EU-wide agricultural quotas on Ukrainian imports, despite its otherwise pro-enlargement position. [iii]

Similarly, Germany's CDU has been pressured to shift rightward on migration policy, an indicative example of how mainstream parties respond to the growing influence of the radical right. [iv] Overall, radical right parties, such as the AfD and FPÖ, are well-positioned to exploit these dynamics, instrumentalising fears of migration to shape public discourse. This could pressure centrist governments to adopt more restrictive or cautious approaches to enlargement.

Public Referenda

The potential for public referenda to further politicise enlargement represents another major challenge. Certain member states are likely to hold national referenda before beginning the ratification process of any new accessions. For example, in France, it has been constitutionally required since 2005 that any further accession must be approved by referendum or a $\frac{3}{5}$ majority in both the French Senate and the National Assembly.

Even though not constitutionally mandatory for enlargement, Austria has the legal framework to hold referenda on issues pertaining to significant national interest. Although in countries like the Netherlands and Sweden there is no such constitutional provision, Eurosceptic and anti-enlargement parties could apply political pressure for holding referenda on the potential accession of new members, especially as their electoral sway increases. Such referenda entail the risk of turning public opinion into a contested arena for Eurosceptic parties.

For example, a 2024 survey conducted across all 27 EU member states by Ipsos, found that a sizable majority of EU citizens (65%) support a direct vote on which candidate states could be allowed to join the club. This could have dire effects on enlargement plans. As of June 2023, while 53% of EU residents favoured EU enlargement, 37% expressed unequivocal opposition. Support for new admissions has fallen below 50% in member states such as Austria, France, Germany, and Slovakia, indicating a downward trend. [v]

In that context, extended enlargement timeframes, geopolitical uncertainty, along with domestic issues such as economic stagnation and migration pressures, have the potential to further erode public support. Especially, given that Eurosceptics often tend to overstate the perceived risks of enlargement.

In other words, referenda could provide fertile ground for anti-enlargement parties to amplify fears of migration, fiscal strain, and loss of sovereignty, because the focus is on the prospective costs of EU enlargement while ignoring its benefits or for that matter the costs of non-enlargement. In addition, migration policies driven by the far-right could once again exacerbate tensions between Western and Southern or Eastern EU members, affecting other policy areas like enlargement.

The Experience of the 2004 Accessions and the [Costs of Non-Enlargement](#) [vi]

Despite this growing emphasis on the risks of further enlargement, the experience of the 2004 "Big Bang enlargement" remarkably revealed how many of the previously predicted costs were eventually overcome by significant economic, social, and geopolitical gains. This provides useful lessons for the [current discussion on further enlargements](#).

Several of the concerns expressed today by the enlargement-sceptic camp were also echoed in previous enlargements, including the "Big Bang enlargement". Nevertheless, the fears surrounding the 2004 enlargement, such as migration surges, wage deflation, and fiscal strain, ultimately proved unfounded. The integration of ten new countries yielded significant economic and geopolitical benefits for the entire EU bloc.

20 years since the “Big Bang enlargement”, much of the discussion has been centred around the economic success stories of the then newly admitted member states (EU10). However, less discussed, but equally important, have been the benefits for the older member states and the EU as a whole. Workers from the EU10 addressed labour shortages in industries like agriculture, construction, and healthcare across the bloc of the existing 15 member states.

In Germany alone, approximately 820,000 workers from the EU10 now contribute to sectors that often fail to attract the interest of domestic labour, such as caregiving and seasonal agriculture.^[vii] Contrary to fears prior to accession, this influx of migrants did not displace local workers but complemented them, addressing demographic challenges in ageing economies of Western Europe.

In recent years, labour migration flows from the Western Balkans to the EU have also helped alleviate workforce shortages, particularly in countries like Germany and Austria. In Germany alone, workers from the Western Balkans account for over 300,000 employees, primarily in the construction, medical, and logistics industries, making them the second biggest non-EU foreign labour group after immigrants from Turkey.^[viii] Austria is home to more than 250,000 Serb immigrants, many of whom contribute significantly to sectors like manufacturing and hospitality.

The Western Balkans Regulation, introduced by the German government in 2015, permits up to 25,500 workers annually to legally migrate to Germany. In January 2024, this annual quota was doubled to 50,000 workers.^[ix] Despite helping fill gaps in the labour market, it is still a short-term rather than a long-term solution. With projections indicating a shortage of up to 5 million workers by 2030, Germany’s labour scarcity is poised to be a key point of economic concern in the years ahead.^[x]

Overall, failure to integrate the Western Balkans fully into the EU will have long-term economic opportunity costs, including a declining EU workforce. As the EU10 countries, including Poland, Czechia and Slovakia, transition into labour-importing economies, Western Europe will increasingly rely on new sources of skilled and semi-skilled workers. The Western Balkans is the next logical source, but without EU accession, migration barriers will continue to limit their contribution.

Conclusions & Recommendations

The intersection of national politics, public opinion, and radical right narratives makes EU enlargement increasingly fraught. Looking ahead, highlighting positive outcomes of the “Big Bang enlargement” can counter enlargement-sceptic narratives.

Delaying or abandoning enlargement would have significant opportunity costs. Economically, the EU risks reducing its labour pool. Countries like Ukraine and the Western Balkans could help address Europe’s demographic challenges by supplying skilled and semi-skilled workers to ageing economies.

To that end, pro-European and pro-enlargement policymakers should:

- Make concerted efforts to shift public discourse from the alleged costs of enlargement to its benefits and the opportunity costs of non-enlargement.
- Adopt proactive communication strategies, tackling fears over disruptive migration and fiscal strains with data-driven messaging that highlights the long-term economic and strategic benefits of enlargement.
- Orchestrate tailored public awareness campaigns intended for rural communities in net-contributing member states, where fears of fiscal strain are most pronounced; these rural areas often constitute key target groups for radical right parties, which capitalise on economic concerns and anxiety over migration to promote anti-enlargement narratives.
- Focus also their messaging on urban centres, which are more likely to benefit from skilled migration.
- Use economic indicators, localised data and case studies to demonstrate how enlargement benefits existing member states; for example, show how integration of the EU10 and the recent migrant flows from the Western Balkans boosted German exports or addressed serious labour shortages in the German economy.

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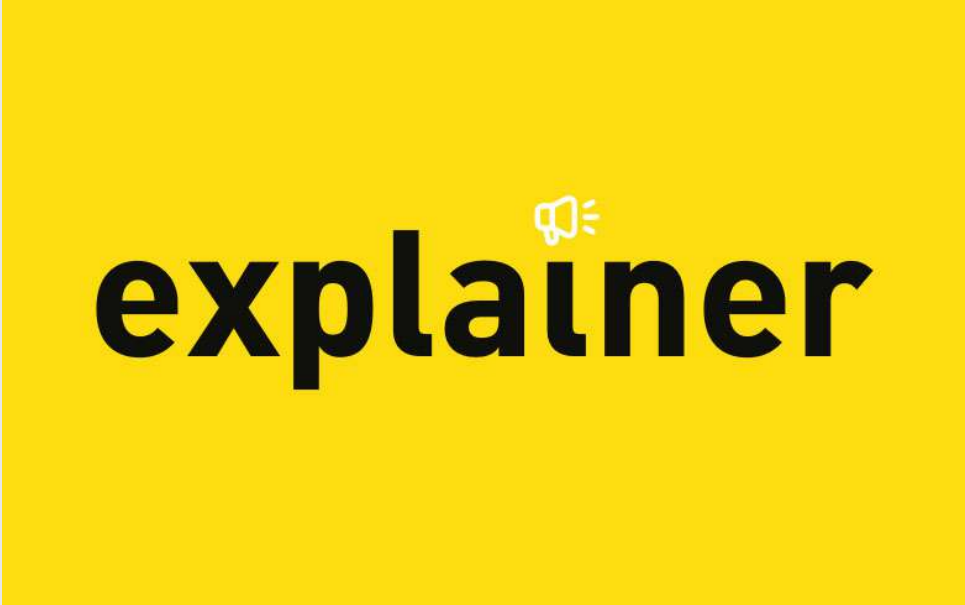
ELIAMEP Explainer: Albania's 2025 Elections

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May 2025



explainer

EU Accession and the Stakes of the 2025 Vote

The parliamentary elections held on 11 May 2025 represent a significant milestone in Albania's post-communist trajectory. They were the first national elections since the country formally opened EU accession talks in October 2024 - a development that has since progressed with the opening of Clusters 1, 2, and 6, and the expected launch of Cluster 3 negotiations in the coming days. These developments place heightened political weight on the elections, particularly with respect to Cluster 1, which centres on the 'Fundamentals': the rule of law and democratic governance. The vote therefore offers insight not just into electoral preferences, but also into the broader evolution of Albania's democratic architecture.

A Fourth Term for Rama: Consolidation of Power and Concerns

Prime Minister Edi Rama secured a historic fourth consecutive term in office, becoming the longest-serving leader in Albania since the end of communist rule. With nearly 70% of the diaspora vote and the overwhelming majority of domestic votes counted, the Socialist Party (SP) is poised to take 52.3% of the national vote, translating to 83 seats in the 140-member Parliament. Rama's victory underscores the dominance of a party machinery that has proven both effective and resilient, aided by an opposition still weakened by internal rifts and credibility issues. However, the continued concentration of political power has drawn concern, especially given Albania's persistent challenges around transparency, institutional integrity, and allegations of elite impunity.

EU Integration as Campaign Platform

The SP's campaign leaned heavily on promises of EU integration, framed through the slogan "Only with Edi and the SP, Albania in the EU in 2030." PM Rama's narrative during the campaign focused on the objective of closing the negotiation process within 2027 and preparing for membership in 2030. While the message resonated with many voters, particularly in urban areas and among diaspora constituencies, the election was not without controversy. The OSCE/ODIHR's preliminary findings pointed to several irregularities, including use of public administration during the campaign, voter intimidation, and imbalanced media coverage - factors that cast doubt on the overall fairness of the contest, especially for smaller or newly established parties.

The Return of Sali Berisha: Populism and Opposition Fragmentation

One of the more remarkable stories of the election was the political re-emergence of former Prime Minister and President Sali Berisha. Despite leading the Democratic Party (PD) to one of its worst electoral defeats - securing just 50 mandates - Berisha reasserted himself as a central opposition figure. This comeback occurred in the shadow of serious legal troubles and international sanctions: Berisha remains banned from entering both the United States and the United Kingdom over corruption allegations. His return to frontline politics, following a fractious split with former PD leader Lulzim Basha, illustrates the resilience of strongman politics in Albania, but also the deep divisions fracturing the opposition camp.

Populist Messaging and the Limits of Imported Strategy

Berisha's campaign rhetoric drew from a distinctly populist playbook, borrowing language and strategy from the American "Make America Great Again" (MAGA) model. The PD adopted the slogan to "Make Albania Greater" and hired Chris LaCivita, a political strategist associated with Donald Trump's campaigns. The move appeared designed to resonate with Albania's strongly pro-American electorate. However, the attempt to import right-wing American populism into the Albanian context failed to generate the expected momentum - perhaps indicating that such messaging does not translate easily across cultural or political environments.

Turnout and the Impact of the Diaspora Vote

Turnout in the 2025 elections was officially recorded at 42.2% of the 3.47 million registered voters - a figure that, at first glance, appears low. However, when adjusted for Albania's actual resident population (approximately 2.4 million, per INSTAT 2023), the level of in-country participation is proportionally higher. **What was genuinely novel in this election cycle was the introduction of postal voting for the Albanian diaspora.** For the first time, nearly 246,000 citizens living abroad registered through the Electronic Platform of Registration, and around 195,000 returned valid ballots - an engagement rate of over 80%, signalling the diaspora's growing role in shaping national politics.

New Political Movements: Modest Gains, Symbolic Importance

Another defining feature of the 2025 election was the emergence of new political forces. While their parliamentary gains were modest, their presence signalled an appetite for alternatives beyond the entrenched PS-PD duopoly. Groups such as Nisma Thurje (Hashtag Initiative), Lëvizja Shqipëria Bëhet (Albania Becomes Movement), and Lëvizja Bashkë (Together Movement), all with roots in anti-corruption activism and social justice advocacy, made notable showings in urban centres like Tirana. Others, such as Agron Shehaj's Mundësia or factions aligned with Lulzim Basha, stemmed from the internal splintering of the Democratic Party. Altogether, these new movements secured more 130,000 votes and at least four parliamentary seats - a modest but symbolically important breakthrough in an electoral system that strongly favours the two major parties.

Overall, the election process was largely peaceful and technically competitive, but the playing field remained tilted in favour of the two main political forces. The SP and PD benefitted from structural advantages - financial resources, institutional access, and media visibility - that new actors struggled to overcome. While formal democratic procedures were observed, the substance of democratic accountability and a meaningful policy debate, remained largely absent from the campaign discourse. Albania's polarised political climate, entrenched mistrust between leading actors, and an electorate still sceptical of real reform suggest that meaningful political transformation will remain gradual, contentious, and hard-won.

Europe's Overlooked Allies: Why the Western Balkans Matter for EU Defence Readiness

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EXECUTIVE SUMMARY

This report explores the strategic importance of the Western Balkans in the context of the EU's pursuit of strategic autonomy and enhanced defence readiness. It underscores the argument that Western Balkan countries—despite not yet being EU member states—have increasingly proven their value as security contributors and partners. This contribution is both timely and essential as the EU confronts the implications of the war in Ukraine and potential shifts in the transatlantic security relationship. Hence, the integration of the Western Balkan region into the European Union (EU) should be seen as a part of the solution to some of the pressing challenges the EU faces, not as a burden.

At the EU level, recent initiatives, such as the 2024 European Defence Industrial Strategy (EDIS) and the 2025 White Paper on European Defence, have aimed to enhance collective readiness and industrial capability. Yet, the full potential of regional partnerships—particularly with the Western Balkan region—has not been fully realized, undercutting the ability to leverage and further develop their defence capabilities. To that effect, closer integration of the region could play a constructive and multidimensional role in helping to advance all four objectives laid out in the 2022 Strategic Compass for Security and Defence, as well as contributing directly to four of the seven priorities listed in the White Paper.

Western Balkan countries have significantly increased their defence spending, exceeding NATO's 2% GDP threshold. Most countries in the region allocate over 20% of their defence budgets to equipment and modernization. Increasing defence procurement from EU countries further strengthens interoperability as well as supporting the European Defence Technological and Industrial Base (EDTIB).

The region has demonstrated solidarity with Ukraine, providing military aid, equipment, and training. While not always publicly disclosed, support from countries like Albania, North Macedonia, and Montenegro has been substantial. Even Serbia, despite maintaining ties with Russia, has also supported Ukraine through financial and humanitarian aid as well as military supplies, including weapons to the value of over 800 million EUR through third parties. The Western Balkans have also contributed to multiple CSDP missions and international peacekeeping operations.

Their deployments, often small but specialized, enhance Europe's capacity while underscoring their own operational capability and commitment to European security.

A critical yet underutilized asset is the region's long-standing defence industrial base, which possesses the infrastructure and expertise to produce a wide range of military goods. Comprising approximately 200 companies, this sector can manufacture systems compatible with NATO standards at lower cost, providing a valuable, scalable resource for Ukraine and a vital contribution to meeting the EU's own defence production targets. Serbia, the biggest producer, accounts for 2/3 of the total Western Balkan exports, while companies in Bosnia and Herzegovina have the capacity to produce 500,000 artillery shells annually. The other countries have also developed their defence industries, excelling especially in the production of ammunition and explosives, but also demonstrating the potential to “leapfrog” into the production of drones.

The region is geographically critical to European military logistics, serving as a strategic land bridge for military mobility and supply chain security connected to both the frontline in Ukraine and the Eastern Mediterranean. The development of crucial dual-use infrastructure, such as Corridor 8 connecting the Adriatic and Black Seas, the NATO Kucovë airbase and Porto Romano naval port in Albania, and the presence of major training facilities like Krivolak in North Macedonia, underscore the region's role in strategic enablers. Still, EU funding for military mobility as well as EU investments in the region's defence or dual-use industries remain limited.

The Western Balkans' existing capabilities align with several EU defence priorities outlined in the Readiness 2030 agenda, particularly in artillery ammunition production, drone systems, and logistics. Despite this clear potential, the EU's defence and enlargement policies often operate in separate “silos”. In order to achieve true European strategic autonomy, the EU must adopt a more synergistic approach, leveraging the Western Balkans' defence contributions as a rationale for accelerating their integration into the Union. To that effect, full CFSP alignment and rule of law improvements in the Western Balkans are as important as the region's material contribution.

Structured defence integration can be a strategic lever for reinvigorating the EU enlargement process. By offering candidate countries tangible incentives—such as participation in EU defence initiatives and joint projects, along with industrial cooperation—accession becomes more credible and economically meaningful. This approach will not only strengthen defence sectors, it will also boost local economies, align candidates more closely with EU strategic goals and values, and sustain political momentum and reform efforts in the face of enlargement fatigue. Among EU member states,

such engagement opportunities could help foster a better understanding of why the Western Balkans need to be integrated in the EU sooner rather than later, and inspire trust that could spill over from defence cooperation into a more welcoming stance towards enlargement.

In conclusion, the Western Balkans are evolving from security consumers to proactive contributors to European defence. Their rising investments, operational commitments, industrial capabilities, and strategic location make them indispensable allies. As the EU seeks to meet the challenges of an increasingly volatile security environment, full engagement with the region—politically, operationally, and economically—offers a strategic opportunity to enhance resilience, autonomy, and defence readiness. Therefore, membership in the EU for the Western Balkans would be a geopolitical win for Europe.

Policy recommendations:

Institutional integration: Create formal pathways for Western Balkan participation in the EU's existing and emerging defence initiatives, including the European Defence Industry Programme, European Defence Agency, and European Defence Fund.

Policy exchange: Include the Western Balkan countries in CFSP, CSDP and other defence-related policy discussions whenever possible (even as observers) to ensure continuous alignment, explore further integration avenues, and help them prepare for membership.

Joint training: Encourage joint military training between national armies of EU member states and the Western Balkan countries to foster trust, build bonds and ensure interoperability.

Infrastructure funding: Prioritize funding of dual-use infrastructure in the region to support military mobility and logistical resilience.

Transparency and governance: Strengthen rule-of-law and anti-corruption mechanisms in defence procurement to ensure responsible use of increasing defence budgets and EU instruments.

Industrial investment: Provide targeted EU investment to the region's defence and dual-use industries to enhance production capacity and supply chain resilience, while boosting the region's smaller markets through EU-wide economies of scale.

Private-sector partnerships: Foster long-term partnerships between Western Balkan defence companies and EU firms to integrate regional producers into European supply chains and innovation ecosystems.

A common defence and security market: As the Western Balkans gradually join the EU Single Market, involve them in the building of the common security and defence market by further dismantling trade and investment barriers, promoting joint ventures and procurement, and harmonizing standards in dual-use and defence technologies.

Link to enlargement: Integrate participation in defence-related policy forums and instruments, along with the reforms required for that to happen, into the gradual accession framework to ensure that some benefits of the defence integration are felt early on and incentivize enlargement.

A means to overcome enlargement fatigue: Amidst geopolitical uncertainty and heightened security tensions, communicate the Western Balkans' contribution to European defence readiness towards and within EU member states to push enlargement forward and overcome reluctance.

INTRODUCTION

The EU's Quest for Strategic Autonomy and Defence Readiness

Strategic autonomy has become a cornerstone of the EU's discourse and policy on security and its role as a global actor. As early as 2016, the EU Global Strategy articulated the aspiration for “an appropriate level of strategic autonomy,” which the accompanying Implementation Plan defined as the “ability to act and cooperate with international and regional partners wherever possible, while being able to operate autonomously when and where necessary.”[1]

Six years later, the 2022 Strategic Compass for Security and Defence responded to the deteriorating security environment by calling for a “quantum leap forward” in the EU's ability and willingness to act.[2] It identified four overarching objectives:

- Act rapidly and robustly whenever a crisis erupts, with partners if possible and alone when necessary;
- Enhance its ability to anticipate threats, guarantee secure access to strategic domains, and protect its citizens;
- Invest more and better in capabilities and innovative technologies, fill strategic gaps, and reduce technological and industrial dependencies;
- Strengthen cooperation with partners to address common threats and challenges.

However, the European Union's pursuit of defence readiness has faced a series of interrelated challenges that hinder its ability to respond effectively to security threats. Chief among these is the persistent fragmentation of the European defence market, which limits economies of scale and obstructs coordinated procurement and innovation. Significant gaps in the EU's production capacity require enhanced mechanisms for financing, joint procurement, and the ramping up of industrial output. Ensuring the security and resilience of defence-related supply chains—particularly in light of geopolitical disruptions—is another pressing concern. Moreover, achieving full interoperability among member states' armed forces, and ensuring rapid deployment capabilities, remain long-standing operational hurdles. The Union also struggles to consolidate and share intelligence effectively, which undermines situational awareness and joint decision-making. Together, these structural and strategic deficiencies constrain the EU's efforts to forge a robust, agile, and autonomous defence posture.

In order to address some of these challenges, the 2024 European Defence Industrial Strategy (EDIS) defines priorities and actions for the EU's defence industrial policy through until 2035.[3] Its overarching aim is to bolster defence readiness as a central pillar of European strategic autonomy. The key objectives of EDIS include reinforcing the European Defence Technological and Industrial Base (EDTIB) and fostering cooperation with international and like-minded partners. Based on this strategy, the European Commission proposed a Regulation establishing the European Defence Industry Programme (EDIP) along with a framework of measures to secure the timely availability and delivery of defence products.[4] Among them, the European Defence Industry Reinforcement through joint Procurement Act (EDIRPA) aims to incentivize joint defence procurements using the EU budget for the first time to support joint buying. Such a measure aims not only to strengthen the EDTIB by favouring European products, but also to enhance interoperability, achieve cost-effectiveness through economies of scale, and address urgent defence capability gaps. The most recent Security Action for Europe (SAFE) Regulation envisages 150 billion EUR to boost investment in defence industrial production and joint procurements.[5]

Nonetheless, while these efforts are expected to bear fruit primarily in the medium to long term, the EU is under pressure to deliver concrete solutions in the immediate future. The second term of President Trump has triggered a reassessment of Europe's dependency on the United States, prompting calls for the EU to take greater responsibility for ensuring peace and stability on the continent. Anticipated risks include a possible withdrawal of US troops and military assets from Europe, reduced intelligence cooperation, and even challenges to NATO's Article 5 on collective defence. Most concerning of all, perhaps, is the potential pursuit of a peace deal with Russia at Ukraine's expense—a move that would not only undermine Ukraine's ability to resist current and future aggression, but also embolden Russia to pursue further destabilization efforts, including possible threats against EU and NATO member states.[6]

The Evolving Security and Defence Role of the Western Balkans

Historically, the Western Balkans have been perceived as a “security consumer”—a region requiring sustained EU engagement to preserve stability and prevent the spillover of regional conflict into the Union. Indeed, the EU's early discussions about developing autonomous security and defence capabilities were catalysed by its inability to respond effectively to the Yugoslav wars in the 1990s, which ultimately necessitated NATO-led interventions. While bilateral disputes and sporadic tensions remain—particularly concerning the Serbia-Kosovo relationship—the region has made

notable progress in mitigating internal frictions and diminishing the risk of renewed conflict. With three countries now members of NATO (Albania, Montenegro and North Macedonia) and five of the six engaged in EU accession negotiations (only Kosovo remaining only a potential candidate country), the Western Balkans increasingly appear ready to adopt a more proactive role in supporting European peace and security. The appointment of a former minister of defence of North Macedonia, Radmila Shekerinska, as NATO deputy Secretary General in 2024, and the selection of Tirana to host the annual NATO summit in 2027, testify to the region's rising profile in the international defence community.

Given the region's deep economic integration with the EU and its ambitions to join the Union, it is imperative for Western Balkan countries to align their defence manufacturing priorities with the EU's evolving strategic needs. Their geographic proximity further underscores the importance of including the Western Balkans in EU considerations on critical infrastructure, military mobility, and supply chain security across the broader South East Europe (SEE) region.

In this context, the potential contribution of the Western Balkans to EU strategic autonomy and defence readiness can be analysed on two levels:

- Strengthening the EDTIB, both through the acquisition of European defence products and technologies and the production of critical military goods, components, and raw materials, thereby supporting the EU's defence industrial targets and contributing to the resilience of European supply chains;
- Deepening operational cooperation by establishing closer ties that enable the pooling of existing and emerging defence capabilities in the Western Balkans in order to reinforce Europe's collective security (e.g. strategic enablers, military mobility, rapid deployment, and participation in CSDP missions).

While the fourth objective of the EU's Strategic Compass explicitly calls for "boosting cooperation with bilateral partners that share the same values and interests" and for the development of "tailored partnerships in the Western Balkans", this paper contends that the Western Balkans have the potential to play a constructive and multidimensional role in advancing all four objectives set out in this EU document. Such a contribution is both timely and essential in light of the EU's current security challenges, with every supportive effort counting towards the achieving of greater strategic autonomy and defence readiness.

The paper uses publicly available data including official statements and websites; open-source databases; secondary sources such as scholarly analyses, reports and media articles; as well as original data collected through 16 semi-structured interviews and 10 off-the-record meetings and conversations with Western Balkan and EU defence officials and experts.

The chapters that follow examine: five specific avenues through which the Western Balkans can make a contribution to EU defence readiness; the links between the Western Balkans' potential contribution and the existing and emerging opportunities for cooperation stemming from the EU's defence plans and instruments; as well as the challenges to this contribution actually materializing in light of the region's current relations with the EU and enlargement policy.

THE WESTERN BALKANS' POTENTIAL CONTRIBUTION TO EU STRATEGIC AUTONOMY AND DEFENCE READINESS

Defence spending and acquisitions

Over the past five years, the defence spending of the Western Balkans has been consistently rising. In fact, with the exception of Bosnia and Herzegovina, all countries in the region are projected to spend over 2% of their GDP on defence in 2025. The regional average for 2025 is 2.06%, and the average of the three NATO countries rises to 2.3%. To put this into perspective, the EU27 average for 2024 is estimated at around 1.9%, while at the level of the twenty-three EU NATO members, the average is estimated to stand at 1.99% for 2024 and expected to reach 2.04% in 2025.[7] While NATO has agreed to raise the bar higher, setting a target of 5% of GDP, the Western Balkans are not lagging behind for now—in fact, in many ways, they are keeping pace or even ahead of the curve.

COUNTRY	2021	2022	2023	2024	2025
ALBANIA	1.40	1.50	1.74	2.04	2.50
BOSNIA & HERZEGOVINA	0.80	0.70	0.70	0.81	0.90
NORTH MACEDONIA	1.40	1.70	1.70	2.22	2.40
MONTENEGRO	0.90	0.96	1.00	2.02	2.00
SERBIA	2.40	2.00	2.05	1.80	2.52
KOSOVO	0.85	1.13	1.30	2.00	2.04
AVERAGE	1.29	1.33	1.42	1.81	2.06

Table: Defence spending of the Western Balkan countries as a percentage of their GDP, per year, 2021-2025 Source: Authors' compilation based on multiple sources[8]

Most of the Western Balkan countries exceed the NATO recommended threshold of investing 20% of their defence budgets in equipment and modernisation, with some—like North Macedonia, Serbia and Albania— standing at or exceeding 30%.[9] A longer-term view suggests efforts to add capabilities and pursue modernization accelerated in the 2010s and 2020s. The acquisitions extend across a number of suppliers within and outside Europe, with the US accounting for a significant percentage along with Turkey. In the case of Serbia, there have been problematic purchases of Chinese defence systems, as well.[10]

Still, over the past decade, the Western Balkans have increasingly turned to EU member states to procure a broad range of defence equipment, including both legacy systems and modern military technologies, thereby contributing to the strengthening of the EU defence industry.[11] For instance, Albania has focused primarily on enhancing its rotary-wing capabilities, acquiring EC-145 light helicopters from Germany in 2014 and LMV armoured personnel vehicles from Italy in 2015. Montenegro has bolstered its armoured mobility with Survivor-2 vehicles from Austria in 2014 and Dingo-2 APCs from Germany in 2021. North Macedonia has recently prioritized aerial mobility and air defence, placing orders in 2023 for AW-149 and AW-169 helicopters from Italy, along with portable Mistral surface-to- air missiles from France in 2022. Serbia has undertaken a more comprehensive modernization effort, acquiring a wide array of systems including C-295 transport aircraft from Spain (2022), Mistral SAMs from France (2019), and a suite of advanced radar systems from France, Slovenia, Germany and Denmark between 2015 and 2021. In addition, Serbia expanded its rotary-wing and missile strike capabilities with EC-145 helicopters from Germany and FZ-275 air-to-surface missiles from Belgium. The most recent Serbian purchase of Rafale fighter jets from France proved highly controversial: given Serbia's close ties to Russia, the Rafales it received have some downgraded capabilities.[12]

This trend underscores a steady increase in defence cooperation between the Western Balkans and the EU, in terms of both equipment interoperability and strategic alignment. Weapons purchases are also important, because they can unlock further cooperation through associated activities: for instance, training in relation to complex weapons systems, or support for the recipient country to develop its own industrial niche for maintenance.[13]

As seen through the experience of joint purchases within NATO, the Western Balkans' potential inclusion in the EU's joint procurement mechanisms could help them, as relatively small consumers, to optimize costs and reduce expenditures by up to 30%.[14] This would arguably act as an additional impetus for the Western Balkans to purchase European defence equipment, further boosting their alignment with the EU's defence standards and priorities.

An additional pathway to facilitate collaboration, enhance capabilities and foster interoperability would be through the establishing of technical arrangements with the European Defence Agency (EDA). Such cooperation would provide the Western Balkan countries access to joint projects, expertise, and insights into armament developments and technological advancement as a means to boost their own research and innovation, address critical capability gaps, and better understand European security challenges and priorities. It could serve as an additional forum for EU member states to engage with the Western Balkan countries, to build trust and to pave the way towards deeper cooperation in other, more sensitive, defence areas. With Serbia the only Western Balkan country to have such a technical arrangement currently in place, other countries seeking to boost their own defence industries—and NATO allies, in particular—should be encouraged to explore the possibility of concluding technical arrangements with the EDA.

Support to Ukraine

The Western Balkan region has demonstrated solidarity with Ukraine following the 2022 invasion: condemning Russia's aggression and expressing support for Ukraine's sovereignty and territorial integrity, it has aligned with EU and NATO stances. Most of the countries in the region have also provided significant military, humanitarian, financial and diplomatic support, manifested through various means.[15] However, this assistance has not always been publicly advertised due to domestic politics or foreign policy reasons, especially in the case of Serbia due to its traditional friendship with Russia.[16] Nonetheless, Serbia has provided Ukraine with direct budget support to the tune of at least 50 million EUR (over \$32 million in 2024 alone), in addition to four donations of electricity generation equipment (one donation alone worth €8.4 million), spare parts produced in Serbia and compatible with the Russian technology used in Ukraine, as well as humanitarian assistance.[17]

Military aid has primarily come from NATO members in the region who donated their Soviet-era equipment; this was crucial at the beginning of the war especially, for Ukrainian soldiers trained and accustomed to using such technology. For instance, North Macedonia provided around 30 T-72 main battle tanks and a quantity of 125 mm tank rounds, 12 Mi-24 helicopters, and 4 Su-25 aircraft, along with spare parts and 30mm ammunition for the jets' guns. The value of these items relative to the country's size ranked the country fourth among NATO allies in terms of contributions per capita at the beginning of 2024. Albania donated 22 US-made International M1224 MaxxPro MRAP (Mine-Resistant Ambush Protected) vehicles fitted with machine guns, which have been observed in frontline positions. Moreover, they donated Chinese-made 7.62mm small arms, as well as 60mm type 63 mortar rounds, which

have also been seen in the theatre, as well as in-house-made 82mm mortar rounds. Albania's commitment is estimated at around 70 million euros in military aid alone. Montenegro sent almost all its legacy naval artillery to Ukraine, including some 760 of the 57×438 mm shells used by the Bofors 57 mm L/70 naval automatic gun, which were fitted on now decommissioned Končar class missile boats, and 15,000 57 mm and 76 mm artillery shells. Kosovo has provided two military aid packages including trucks, vehicles, armoured personnel carriers, and mortar shells, despite the fact that it is not recognized as an independent country by Ukraine. Albania, North Macedonia and Kosovo have also actively engaged in the training of Ukrainian soldiers.

Serbia's situation is unique. While officially denying direct military aid due to its close ties with Russia, reports suggest that €800 million worth of Serbian-made ammunition has reached Ukraine through third parties.[18] It is also assumed that most of the Bosnian-manufactured weapons and ammunition have reached Ukraine through third parties- the US first and foremost, but also Romania and the Czech Republic, although the exact type and amount remains unclear.[19]

Participation in CSDP and international peacekeeping missions

The EU's Common Security and Defence Policy (CSDP) has historically focused on crisis management operations, both military and civilian, in a variety of conflict zones from Africa to the Middle East and in the Western Balkans itself. The current debate on peace possibly being reached in Ukraine includes the possible deployment of European troops on Ukrainian territory, which would represent a huge challenge for EU Member States—particularly if implemented under EU command and control structures.

Against this backdrop, it is important to underline the Western Balkans' contribution to past and ongoing CSDP missions, as well as their willingness and increased ability to engage in peace efforts in international peacekeeping operations. Given the size of their populations and armies, most Western Balkan countries contribute small but targeted deployments,

often composed of specialized personnel such as trainers, medical teams, and military observers. For example, Albania and Montenegro contributed military personnel to the EU's training missions in Mali; Bosnia and Herzegovina, North Macedonia, and Serbia contributed to military training and security sector reform in the Central African Republic; Montenegro and Serbia provided military advisors and trainers to the EU training mission in Somalia; and Montenegro and Serbia contributed staff officers and naval personnel to support Operation Atalanta in the Horn of Africa (EUNAVFOR). In addition, Albania and North Macedonia have demonstrated particular interest and engagement in EUFOR Althea in Bosnia and Herzegovina in the context of their commitment to strengthening security in their own region.[20]

Moreover, NATO members in the region have actively participated both in the ISAF and Resolute Support Mission in Afghanistan and KFOR in Kosovo with ongoing troop and logistical support. They also contribute to the Enhanced Forward Presence in Latvia and Enhanced Vigilance Activities in Bulgaria.[21] Bosnia and Herzegovina also participated in the NATO operations in Afghanistan and has several designated units that are ready to support NATO missions, including a light infantry battalion, a platoon of military police, and a demining battalion, all graded in line with NATO standards. However, for now, the Bosnian Serb leadership is blocking decisions to send troops on CSDP and other peacekeeping missions, including the dispatch of a demining battalion to Ukraine.[22]

In the context of UN peacekeeping missions, Albania has contributed to UNMISS in South Sudan, MINURCAT in Chad and the Central African Republic, UNOMIG in Georgia, and MFO in Sinai. Bosnia and Herzegovina has deployed police officers to Liberia, Sudan, Cyprus, East Timor, and Haiti. Montenegro has sent military observers to UNMIL in Liberia, UNFICYP in Cyprus, and MINURSO in Western Sahara. North Macedonia has contributed observers to UNMIL in Liberia, UNFICYP in Cyprus, and UNIFIL in Lebanon.

Serbia is the most active country from the region and among the top European contributors of personnel to UN missions, with around 300 personnel in UNIFIL, as well as medical units and military police in MINUSCA, UNFICYP, and MONUSCO in the Democratic Republic of Congo.[23]

The Western Balkan countries demonstrate a growing, constant and diversified commitment and capability to contribute to EU-led missions under the CSDP. They can be seen as a strategically engaged and politically committed region with significant potential to support and enhance the EU's military missions globally, and especially in the context of a post-war Ukraine.

Defence industry

The war in Ukraine revealed that the EU's weapons and ammunition production capacity was largely insufficient in the face of such a contingency. At the beginning of 2025, only 30% of the weapons used in Ukraine were made in the EU, with another third produced domestically and around 40% coming from the US.[24] Moreover, as soon as the EU's lack of capacity to meet its promise of one million shells delivered to Ukraine by March 2024 became obvious, President Zelenskyy urged Ukraine's partners to step up their efforts and then- High Representative Borell urged EU member states to halt all exports to other countries and channel their entire production to Ukraine.[25] The EU would not meet its target until November 2024, with much more still to be done, according to High Representative Kaja Kallas.[26]

It is unclear whether and to which extent the Western Balkans were considered part of the solution to the EU's challenge. Still, the fact that they have managed to significantly scale up their defence production and exports on their own since the beginning of the war indicates their potential to contribute to overall European targets.

The Western Balkans possess a robust and well-established defence industrial base that traces its roots back to the self-sufficiency goals of former Communist regimes. These countries developed an extensive military-industrial complex capable of producing a full range of arms, ammunition, and equipment for their armed forces. Today, this legacy translates into a strategic advantage: despite the fact that a significant number of their production facilities were destroyed in the post- Yugoslav transition and failed privatization process, the region still retains the infrastructure, technical know-how, and human capital necessary to manufacture and maintain key defence products in high demand from EU members - ranging from artillery shells and small arms ammunition to armoured vehicles and even drones. Importantly, Western Balkan producers can manufacture systems based on both NATO (155mm) and Soviet standards, making them particularly valuable in the context of the war in Ukraine.

There are approximately 200 companies producing defence goods and technologies in the region, most of them located in either Serbia or Bosnia and Herzegovina. The two countries alone account for most of the region's military exports. Serbia leads in arms and ammunition exports, making up nearly 66% of regional exports and generating approximately €1.2 turnover in profits in 2021, while Bosnia and Herzegovina contributes around 32%. [27]

The Serbian defence industry is a dynamic and export-driven sector that comprises a mix of state-owned enterprises—such as Jugoimport- SDPR, Zastava Arms, and Krušik—and a growing number of private firms like EDePro. The industry produces a wide array of military equipment, including small arms, artillery systems like the Nora B-52 howitzer and Tamnava rocket launcher, armoured vehicles such as the Lazar and Milosh, and is growing its capabilities in Unmanned Aerial Systems (UAS) and missile technologies. Serbia maintains a strong presence in international defence markets, exporting to over 50 countries with key customers in the Middle East, Africa, and Asia. Government backing has played a critical role in the sector's growth, with support for R&D, modernization, and export facilitation. Despite challenges—such as limited domestic procurement, reliance on imported components for high-tech systems, and occasional controversy over arms exports—Serbia's defence industry remains a strategic economic asset and a cornerstone of the country's national security and foreign policy outreach.

Bosnia and Herzegovina's military industry employs around 5,000 people in over 20 companies. [28] The largest among them are predominantly owned by the entity governments (and not the state- level government), which shields their work and exports from the ever more frequent political crises and related embargos at the state level. [29]

The majority of the weapon- and ammunition-producing facilities are based in the territory of the Federation of BiH, while the companies based in the other entity, the Republika Srpska (RS), are engaged in maintaining weapon systems and military equipment. Many of the companies namely BNT, Pretis, Binas, and others have ramped up the manufacturing of 155 mm artillery shells, drones, and other essential equipment for Ukraine. BNT alone produces a wide array of artillery pieces, with a total yearly output of 500,000 units. [30] Bosnia and Herzegovina's overall production has significant capacity for further development and could yield considerable output with minimal investment and/or other incentives from the EU and/or its member states. [31]

Meanwhile, Albania, North Macedonia and Montenegro contribute to the sector through specialized ammunition and explosives. Albania has already launched a national strategy to revitalize its defence industry through state and private investment; it has already begun to operationalize it inter alia through the joint declaration on cooperation in the defence sector with the UK, which relates to the joint production of military vehicles. [32] The ambition is to start small—with the production of explosives in Elbasan, small arms and light weapons (SALW) and ammunition for the domestic army as well as drones—then to gradually move on to more complex defence products. [33]

Following the purchase of Turkish Bayraktar drones, Ankara has committed to support Kosovo's plans to launch a domestic NATO- standard drone and ammunition production. [34] MKE—Turkey's largest state-owned defence company—has also pledged to set up the first ammunition factory in Kosovo to produce various calibres of ammunition according to NATO standards. [35] They have also signed an agreement to invest in the production of gunpowder at ATS, North Macedonia's biggest ammunition manufacturer. [36]

Cost-effectiveness is a key strength of the Western Balkans' defence industry. Their products are significantly cheaper than Western equivalents, offering a more affordable supply source for both EU partner countries and Ukraine. Additionally, the geographic proximity of the region to the Ukrainian frontline reduces logistical costs and shortens delivery times. Looking ahead, there is considerable opportunity for “leapfrogging” into advanced technologies with targeted investment.

Strategic enablers

Military mobility is one of the most important aspects to consider in the context of boosting ties between the EU and the Western Balkans, in particular given the strategic location of the region between the Ukrainian frontline and the Eastern Mediterranean. The Western Balkan region is also surrounded by EU member states, which makes it indispensable both for the EU's internal connectivity and for ensuring alternative, secure and cost-effective routes. Experiences in previous operations, including those in Iraq but also the current war in Ukraine, have shown that if one country decides not to allow passage or closes its airspace, the costs may be too high to deploy European armed forces, or at least significantly higher. [37] Hence, as a first step, the revised EU TEN-T Regulation of 2024 extends the core network to the Western

Balkans; a significant portion of the planned rail and road infrastructure has yet to be built or up-scaled to military mobility standards, however.[38] Moreover, regulatory and procedural issues persist, mirroring and amplifying the existing obstacles to the freedom of movement for people and goods between the EU and the Western Balkans in civilian terms.[39] Hence, while the contribution is evident, for the Western Balkans to achieve their full potential in terms of military mobility, these aspects will have to be addressed in the region's EU accession process, and specifically its gradual integration into the Single Market.

The EU has allocated 1.7 billion for military mobility in the 2021-2027 funding period, but none of the approved projects are located in South- East Europe. This is noted in the European Court of Auditors report, which states that “sufficient account was not taken of geopolitical and military factors when deciding which dual-use infrastructure projects to finance; projects were selected on a piecemeal basis, not always in the most strategic locations, and without considering the broader picture; projects were funded mainly in the east of the EU, but the bloc hardly funded any projects at all on the southern route towards Ukraine; the projects were already selected for EU funding before the most urgent priorities were established.”[40]

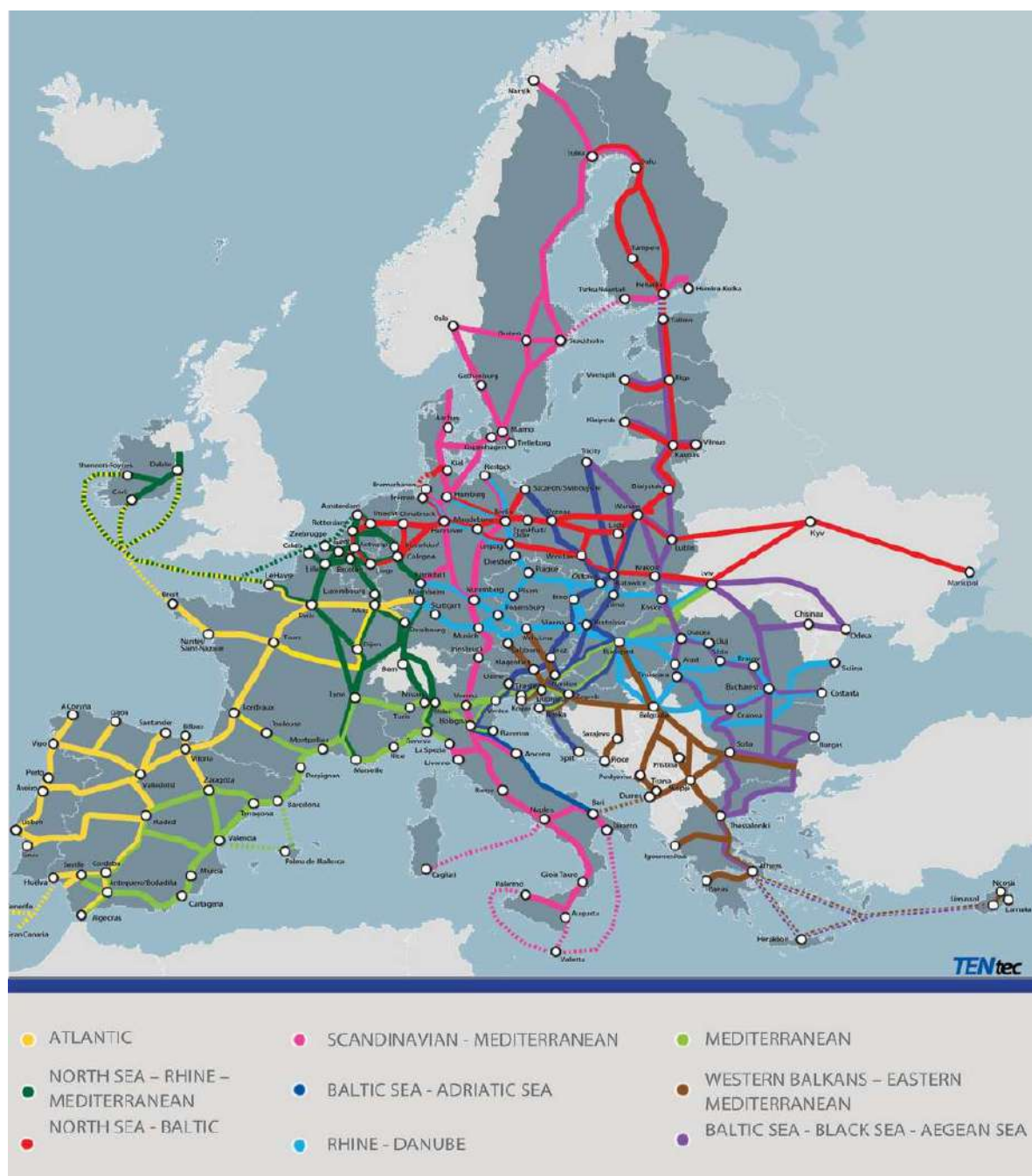


Image: Map of Trans-European Transport Network Corridors Source: European Commission, DG for Mobility and Transport

At the same time, the Western Balkan region has been leveraging other funding to contribute to military mobility. A prime example is Corridor 8, a strategic route in the making that will cross North Macedonia and connect the Adriatic Sea at the port of Durrës in Albania with the Black Sea at the port of Varna in Bulgaria.

Given the diverging interests and positions in the region, the corridor is of paramount importance for securing the Eastern flank by specifically meeting the needs of Romania and Bulgaria and better connecting them with the European core.[41] It offers major potential for dual-use connectivity across the region and for ensuring the security of supply chains. As they do not have access to EU structural funds, but only to smaller grant amounts under the Instrument for Pre-Accession (IPA), Albania and North Macedonia currently rely mostly on loans and are investing heavily from their own national budgets in building the road and rail infrastructure. For instance, Albania is funding the development of the dual-use Porto Romano port in Durrës with 390 million EUR taken entirely from the state budget.[42] Moreover, in 2024 Albania completed the first NATO airbase in the region, in Kuçovë, and has developed its plan to revitalize the submarine base in Porto Palermo.

In terms of training infrastructure, North Macedonia stands out with its Krivolak training area—one of the largest NATO facilities in the region. Krivolak regularly hosts international military exercises, including the major Swift Response drill in 2022, which brought together 4,600 troops from eight NATO countries. Pasuljanske Livade in Serbia and the Manjacha combat training centre in Bosnia and Herzegovina are also sizeable military training grounds that have been actively used for regional and NATO Partnership for Peace exercises. Kosovo, on the other hand, has focused on the development of cybersecurity capabilities with the support of the US and the UK, creating a cybersecurity training centre within its Ministry of Defence which is preparing to serve as a regional training hub.[43]

When it comes to military medical support, Skopje hosts the Balkan Medical Task Force (BMTF), a crucial multinational military medical unit uniting five Western Balkan nations and Slovenia.[44] Established to enhance regional medical capabilities and interoperability, the BMTF provides Role 2 level medical support for crisis response and disaster relief, according to NATO standards.

THE ROLE OF THE WESTERN BALKANS IN “READINESS 2030”

Building on the aforementioned Strategic Compass and the European Defence Industrial Strategy (EDIS), the 2025 White Paper on European Defence - Readiness 2030 focuses on the capabilities necessary for European military readiness and the improvements in industrial capacity required to deliver them. The White Paper, shaped by the challenges imposed by the war in Ukraine, envisages Ukraine's inclusion in all emerging EU defence initiatives to develop military capabilities and integrate defence industries. In this context, the NATO allies in the Western Balkans are mentioned as the EU's partners in a rather vague commitment to jointly promote peace, security and stability on the continent.[45] Actually, beyond that explicit link with the region, the Western Balkans can also make a direct contribution to four of the seven priority areas identified by the White Paper, including EU support for Ukraine.

First, when it comes to the “provision of large-calibre artillery ammunition with a minimum objective of 2 million rounds per year”, the difficulties and delays experienced by the EU in reaching one million round per year at the end of 2024 demonstrated that the Union needs as much support from partners as possible. As discussed in previous chapters, the regional legacy of defence industrial infrastructure and know-how, the lower production costs in the region compared with the EU single market, and the positive example of Bosnia Herzegovina companies already producing half a million rounds per year, demonstrate how the Western Balkans can make a meaningful contribution to this European defence priority.

Second, to a large extent this also applies to artillery systems, with some countries in the region already demonstrating significant production capacities. Moreover, the business environment in the region seems to have the flexibility required to rapidly expand production capacity, should EU institutions, member states and/or companies invest in cooperative endeavours. As European defence planners prepare for the possibility of a major, high-intensity conflict against a powerful rival, they must not overlook the potential of the Western Balkans.

A third priority outlined by the White Paper concerns drones and counter-drone systems. In this field, a distinction should be made between cheaper and more expendable drones to be produced on a large scale for both intelligence-surveillance-reconnaissance (ISR) and ground attack purposes, and more advanced and sophisticated combat unmanned aircraft systems (UAS). The former category is a good fit for mass manufacture in the Western Balkans due to lower entry barriers[46] compared with combat UAS, as demonstrated—*mutatis mutandis*—by the flourishing drone industries in Ukraine,

Turkey, and some Central Eastern and South-Eastern European countries. Kosovo's partnership with Turkey is a case in point. Once again, EU investments and partnership could leverage this potential of the Western Balkans as security providers.

A fourth priority outlined by the White Paper is military mobility. Broadly speaking, the EU has to fill the gap in logistics and supply that the partial withdrawal of US support to Ukraine is creating—for instance, in the logistics hub in Poland which coordinates the provision of a large part of the military supplies destined for Ukraine. In this context, a greater provision of supplies along Balkan corridors would strengthen the overall resilience and effectiveness of Europe's logistical support to Kyiv. Moreover, it complicates the strategic calculus for Russia, while demonstrating greater European solidarity and cohesion in a situation in which Europe has to demonstrate that it can take responsibility for its own security.

Under the RearmEurope initiative, the EU decided to permit the activation of the “escape clause” included in the Stability and Growth Pact for an increase in defence spending up to 1.5% over the next four years. Thus far, a total of 14 member states have announced that they will avail themselves of this opportunity, signalling a further increase in demand, which EU defence industries will struggle to meet. Therefore, also based on the White Paper, the European Commission—and specifically the Commissioner for Defence and Space—is engaging with both industries and member states to ramp up production and address supply chain bottlenecks. Leveraging the capabilities of the Western Balkans would help in this regard. Relations between the hundreds of companies in the region, which include both Small and Medium-sized Enterprises (SMEs) and medium-sized firms (mid-caps), and defence industries in the EU surely present considerable room for improvement and a win-win solution.

Several factors are feeding into the challenges currently facing European defence. For sure, one is the significant underinvestment by European countries from the 1990s to the mid-2010s in both military equipment and new defence technologies. This has resulted in limited production capabilities, leading to a heavy reliance on imports and off-the-shelf purchases. At the same time, in the post-Cold-War period, industrial development focused on quality rather than quantity, favouring the production of high-technology and complex weapons systems to maintain Europe's operational edge through technological superiority rather than combat mass. Since the war in Ukraine, a clear awareness has resurfaced of the renewed risk of large-scale, high-intensity and protracted conflict and hence also of Europe's deficit in terms of the production of conventional weapons and ammunition.[47]

European policy-makers should be careful in drawing the right lessons from the Russian-Ukrainian war, since a conflict between Russia and NATO countries would look rather different.[48] Still, it is fair to say that most European militaries have to rebalance in order to increase the combat mass and quantity of more affordable and expendable equipment, including ammunition, artillery, drones and counter-drone capabilities—all of which are areas where the Western Balkans has significant potential, as discussed above.

Moreover, this type of conflict scenario requires a strong and adaptable industrial base, with high levels of production and distribution across multiple, scalable sources.[49] The integration of the Western Balkan defence industrial base, with its demonstrated potential to adapt and upscale its production, could be helpful in this respect. However, this would be difficult to achieve without EU commitment in terms of investment, support for innovation, and integration into European supply chains that could ensure a given level of market uptake for those goods or components.

On another note, concerning operational cooperation, the Security and Defence Partnerships signed by Albania and North Macedonia in November 2024 lay the political and legal foundations for deeper integration with EU military capabilities. These tailored partnerships aim to introduce ways to cover the needs of the EU defence policy with partners who do not necessarily pass through NATO; in a way, this ensures resilience vis-à-vis the US's changing attitude to—and/or limited participation in—NATO.

However, the general and vague nature of these Security and Defence Partnerships mandates further, more concrete steps, along with a commitment to actually enable the inclusion of these countries into the emerging EU defence initiatives. The agreements mention the countries' participation in the Rapid Deployment Capacity, a potentially welcome step to consider, given the constraints on the EU in terms of military personnel, as well as the need to ensure continuous and increased participation in civilian and military CSDP missions.[50] This is especially relevant in the context of the war in Ukraine and the European politico-military contemplation of a possible multinational force to guarantee a ceasefire on the ground. In the current circumstances, in Ukraine, even a few hundred trained military personnel from each of the Western

Balkan countries would be a useful contribution to an ad hoc coalition which would struggle to put together a robust deployment while respecting the increased commitment to high-readiness forces for collective deterrence and defence subscribed to in NATO's New Force Model. This is particularly true, considering that an eventual European military mission in Ukraine would likely remain deployed there for many years, thus entailing a larger pool of resources to ensure rotation; it would also require the capacity to deploy swift reinforcements to manage possible escalations on the Russian side. NATO's operations in Afghanistan revealed the limitations on the number of troops European countries can deploy and sustain over a longer period: while, over several years at the peak of the deployment, there were a total of 35,000 troops from over 20 European countries, during most of the duration of the operations, their overall contribution ranged from 8,000 to 20,000 troops.

TOWARDS STRENGTHENED EUROPEAN STRATEGIC AUTONOMY: SYNERGY BETWEEN ENLARGEMENT AND DEFENCE POLICY

The push for Europeanization in the defence area is driven by recognition that no single European nation can defend itself or promote peace independently.[51] In that context, the EU and the small countries of the Western Balkan region face the same security challenges. Given the inherent differences in their response capabilities and strategic focus, their cooperation could be highly synergetic overall.

However, the Western Balkan countries cannot be expected to function organically and smoothly within the EU defence structures unless they are—or are at least close to becoming—EU member states.[52] For the time being, enlargement and defence policies seem to be developing in silos, with very few dots connected outside CSDP engagement. Still, they are closely related, especially in this period of Russian aggressiveness, increasing global volatility, and a growing number of crisis hotspots around Europe. If the EU is serious about enlargement, it is of the utmost importance that it takes the Western Balkan countries on board in its emerging defence initiatives and uses their potential contributions as a rationale for accelerating their accession to the EU. This, in turn, would serve as a precondition to further develop and leverage the existing defence industry and operational potential of the Western Balkan region to strengthen European strategic autonomy and defence readiness.

In that context, different Western Balkan countries may not have the same opportunity, role, and/or ability to contribute to European defence readiness. The region is arguably not unitary and the countries differ in many aspects: (i) their relationship with the EU, level of ambition and likelihood of joining the bloc; (ii) the degree of political will to implement the necessary EU accession reforms; (iii) their ties with Russia—as the single biggest security threat facing Europe; (iv) their actual potential when it comes to contributing to European defence readiness, be it in terms of defence industry or operational capabilities. In that context, while considering that the entire region needs to progress towards EU membership and gradually become fully involved in existing and emerging EU defence initiatives, the specific approach should be considered on a country-by-country basis.

Most initiatives that take off in the Western Balkan region are not bottom-up, initiated by the countries themselves, but rather top-down, promoted by the EU. Defence cooperation could thus be considered within the framework of gradual integration, especially given that this is an area where the EU is currently rethinking and reinforcing its policies. Different methods in EU decision-making procedures imply different pathways for closer engagement with the Western Balkans: the European Commission could consider involving the region in initiatives related to defence industrial issues, joint procurement and project funding, all of which are areas where only a qualified majority vote is needed in the Council; on the other hand, member states retain their prerogatives and unanimity in the Council for operational issues and could consider closer cooperation with individual countries, including through the European Defence Agency (EDA).

In that context, it would be useful to include the Western Balkans at an early stage in the emerging initiatives, as it would serve to build mutual trust and keep the region up-to-date in terms of the adoption and implementation of the related EU acquis. The report on the future of the Single Market, commissioned by the European Council and prepared by Enrico Letta, flags the idea of a common market for security and defence, building on the European Commission initiatives since the 2009 defence directives to integrate national markets. If the Western Balkans are poised to gradually join the single market across various areas, as soon as they meet the requirements, it would be beneficial to integrate them from the very beginning in this emerging segment of the single market. Their integration could improve the resilience and optimization of supply chains, while enabling joint projects and procurement to the benefit for both sides. Moreover, Letta's report points to an "integration deficit" as the main hurdle to the common market for security and defence, while proposing a gradual

approach to dismantling integration barriers. This task resonates with what the Western Balkans need to undertake to join the single market more broadly: align with European standards and regulations, remove barriers to trade and investment, and ensure good governance and public service delivery. Hence, accelerating and enhancing the accession reform agendas through alignment with the EU *acquis* and cutting red tape could serve to address many of the potential obstacles to optimizing defence cooperation—including military mobility and the integration of Europe's defence industries. This, in turn, could generate benefits for the local economies and populations of the Western Balkans, which would create and sustain a political momentum for reforms and accession.

If the Western Balkan countries have the opportunity to team up with EU counterparts for joint defence purchases, it will increase the prospects of their buying European materiel, because it will be more cost-effective than purchasing US, Turkish or other foreign goods. Joint procurement, training, exercises and operations would further support interoperability according to NATO standards, ensure that the Western Balkan region's defence spending actually leads to capability development, foster a European military mindset and culture in the region, and gradually help the countries to reach the standards required for a wide range of operational cooperation.

As a sector which, given its nature, is not prone to public scrutiny and where public procurements do not always follow regular procedures, the ambition of most of the Western Balkan countries to further increase defence spending to modernize their armed forces and bring them up to speed with NATO standards could present the risk of increased corruption and mismanagement. Boosting rule-of-law and anti-corruption reforms in the region, which is prioritized on the EU accession agenda, is at a same time a much-needed prerequisite for ensuring that the increase in defence budgets is transparent, efficient, and serves the aim of military modernization.

There are no significant investments by EU countries in the defence industries of the Western Balkans. Instead, as seen in North Macedonia, Kosovo, and most recently Albania, non-EU countries, like Turkey, have been engaging closely with the region with a view to investing in the production of weapons and ammunition. While the Western Balkan countries do not, for the time being, perceive any major risk in these investments—given that they are being made by a NATO ally, they do not serve to forge closer ties with the EU. Moreover, in the mid to long term, there is no guarantee that they will be synergetic with EU interests, especially in the context of its volatile relationship with Turkey.

Finally, it is necessary to emphasise, however, that political positioning and alignment with the EU, including in the context of the CFSP, is key to fostering trust and serves as a pre-condition for forging closer ties and engaging in joint initiatives. All the Western Balkan countries need to demonstrate political will and solidarity at the European level—in the face of the common threat, these are every bit as important as material contributions and interoperability.

CONCLUSIONS

Amidst the worrying geopolitical and security situation that followed in the wake of the Russia's 2022 invasion of Ukraine, the EU institutions and member states have advanced initiatives such as the European Defence Industrial Strategy (EDIS) and European Defence Industry Programme (EDIP) to strengthen strategic autonomy, particularly by enhancing defence readiness and industrial capacity to support both Ukrainian and EU armed forces. Increasing domestic arms production depends on both short- and long-term procurement commitments by European governments and institutions, as well as on private-sector investment in industrial infrastructure, workforce development, and supply chain resilience. As both "demand" signals for increased defence industry outputs and investment levels still fall short of what is needed to meet the EU's stated ambitions for strategic autonomy and defence readiness,[53] in 2025 the EU launched its most recent initiatives under the label Readiness 2030 - the White Paper on European Defence.

At the same time, the Western Balkan countries have started to assume greater responsibility for themselves and their neighbourhood. Their participation in EUTM Somalia, EUTM RCA, EUNAVFOR, and EUFOR Althea spotlight a pattern of interoperability, reliability, and growing operational experience, positioning them as valuable partners in European crisis management and rapid deployment scenarios. This contribution could be especially valuable in the support of the existing missions in the region (EU Althea and KFOR), as the growing engagement of the region's NATO countries in particular demonstrates a growing interest in assuming greater responsibility for their own neighbourhood. Moreover, since Russia's full-scale invasion of Ukraine in 2022, every Western Balkan country has condemned the aggression and undertaken various support efforts for Kyiv, including the provision of military and humanitarian assistance. Even Serbia—despite its reluctance to align with EU sanctions on Russia—has quietly pursued a supportive posture towards Ukraine behind the

scenes. Furthermore, the countries in the region already meet the 2% defence expenditure threshold, with many presenting dynamic defence industries capable of producing at an affordable cost military equipment which both Ukraine and the European armies badly need. Their defence industries either have a proven demonstrated capacity (Serbia and BiH) or nascent potential to further strengthen the European Defence Technological and Industrial Base (EDTIB) and converge with European efforts at boosting self-reliance.

Finally, in terms of strategic enablers, the Western Balkans have a substantial contribution to make in terms of military mobility, but also in training facilities and medical support.

Despite its declared commitment to see all the Western Balkan countries join the EU in the near future, the Union still seems to lack a clear strategy on the region, whose accession is conditioned by EU internal reforms and/or bilateral disputes. This approach is also visible in the area of defence, where the EU and its member states do not have a clear and specific vision on how the partnership could develop from here. At the same time, there are a number of emerging and evolving EU initiatives in which the contribution of the Western Balkan countries could be further explored, integrated and strengthened, leading to tangible benefits for both sides and ultimately strengthening European strategic autonomy and defence readiness.

Policy recommendations:

Institutional integration: Create formal pathways for Western Balkan participation in the EU's existing and emerging defence initiatives, including the European Defence Industry Programme, European Defence Agency, and European Defence Fund.

Policy exchange: Include the Western Balkan countries in CFSP, CSDP and other defence-related policy discussions whenever possible (even as observers), so as to ensure continuous alignment, explore further integration avenues, and help them prepare for membership.

Joint training: Encourage joint military training between the national armies of EU member states and Western Balkan countries to foster trust, build bonds, and ensure interoperability.

Infrastructure funding: Prioritize the funding of dual-use infrastructure in the region to support military mobility and logistical resilience.

Transparency and governance: Strengthen rule-of-law and anti-corruption mechanisms in defence procurement to ensure the increasing defence budgets and EU instruments are used responsibly.

Industrial investment: Provide targeted EU investment to the region's defence and dual-use industries to enhance production capacity and supply chain resilience, while boosting the smaller markets in the region through EU-wide economies of scale.

Private-sector partnerships: Foster long-term partnerships between Western Balkan defence companies and EU firms to integrate regional producers into European supply chains and innovation ecosystems.

Common defence and security market: As the Western Balkans gradually join the EU Single Market, involve them in the building of the common security and defence market by further dismantling trade and investment barriers, promoting joint ventures and procurement, and harmonizing standards in dual-use and defence technologies.

Link to enlargement: Integrate participation in defence-related policy forums and instruments, as well as the reforms required for that to happen, into the gradual accession framework to ensure that some benefits of defence integration are felt early on and incentivize enlargement.

A means to overcome enlargement fatigue: Amidst geopolitical uncertainty and heightened security tensions, communicate the Western Balkans' contribution to European defence readiness to and within EU member states to push enlargement forward and overcome reluctance.

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Enlargement on the edge: Strategic investment, credibility and resilience

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Executive Summary

EU enlargement sits on the edge, no longer a technocratic exercise but a strategic response to war, instability, and global competition. The June 2024 decision to open accession talks with Ukraine and Moldova reframed the process, but momentum now flows primarily through Kyiv and Chişinău, tethering the Western Balkans to their trajectory. This dynamic, coupled with stalled internal reforms and intensifying geopolitical pressure, puts enlargement at a critical inflection point: recognized as essential for Europe's strategic autonomy, yet vulnerable to politicization, fiscal alarmism, and credibility gaps.

Three clusters of challenges define the outlook. First, EU institutional and internal dynamics represent the hardest barrier: budgetary disputes politicized by radical right narratives, fiscal alarmism in Multiannual Financial Framework (MFF) debates, and a deadlock on institutional reform undermine the Union's absorption capacity. Second, the Western Balkans reform agenda lags: while Albania and Montenegro advance, North Macedonia is stuck in a dispute with Bulgaria, Bosnia and Herzegovina struggles internally, Kosovo lacks a reform roadmap and grapples with non-recognition, Serbia hedges between Brussels and Moscow, and the region's defense industries and raw materials remain underutilized. Third, geopolitical pressures, Russia's destabilization tactics, China's economic foothold, and the uncertainty of US commitment, compound the risks of EU hesitation.

To address these challenges, urgent action is needed:

1. Reframe enlargement as a strategic investment through disciplined communication that rebuts fiscal alarmism and migration anxieties, counters far right narratives, and highlights tangible local benefits in both WB6 and EU member states.
2. Develop a phased and credible accession model that manages costs transparently (e.g., through the MFF annex with phased CAP/cohesion integration) and pairs conditionality with visible incentives tied to reforms.
3. Mobilize Western Balkan assets for European strategic autonomy by advancing industrial upgrading, investment prospect, and quick-win projects in defense industries, critical raw materials, and resilient supply chains, linked to the Growth Plan and Critical Raw Materials Act (CRMA).
4. Strengthen EU and regional mechanisms for dispute resolution and reconciliation by enhancing EU-led mediation, cross-border civic platforms, and confidence-building measures to reduce bilateral blockages and nationalist narratives.
5. Reduce third-party dependencies and external influence by aligning with the EU's Economic Security Strategy, creating a dedicated EU-WB resilience dialogue, and deploying blended-finance and co-financing instruments with strong transparency conditionality.

Enlargement today is both a risk and an opportunity; if seized, it can anchor Europe's resilience; if stalled, the EU risks losing credibility, leverage, and stability in its immediate neighborhood.

STATE OF AFFAIRS

EU enlargement is at a critical inflection point. The June 2024 decision to open negotiations with Ukraine and Moldova reframed enlargement from a technical process into a strategic response to war, instability, and global competition. At the same time, debates around the new Multiannual Financial Framework (MFF) have brought enlargement to the center of budget politics, with the European Commission (EC) presenting it as "a strategic investment in Europe's stability and prosperity" (EC, 2025). This has been backed by instruments such as the €50 billion Ukraine Facility and the €6 billion Reform and Growth Facility for the Western Balkans. Yet, momentum flows mainly through Kyiv and Chişinău, tethering the Western Balkans to their trajectory rather than to the region's own reform progress.

The Western Balkans (WB) remain the litmus test of the EU's credibility. Albania and Montenegro have advanced steadily, but Bosnia and Herzegovina faces political fragility, North Macedonia is blocked by a bilateral dispute with Bulgaria, Kosovo struggles with non-recognition, and Serbia maintains a balancing act between Brussels and Moscow. At the same time, the region holds underutilized assets critical for Europe's resilience: defense industries capable of scaling ammunition production (Kristinovska & Marrone, 2025), reserves of critical raw materials (copper, nickel, rare earths) (Krstinovska & Wolf, 2025), and strategic geography for military mobility.

External and internal pressures amplify the stakes. Russia's invasion of Ukraine, China's penetration in Western Balkan critical sectors (Krstinowska & Vuksanović, 2023; Jovanović & Stojadinović, 2025), and Trump's return to the White House, signaling a US retreat from Europe's security umbrella, mean that the EU must assume full responsibility for stabilizing its neighborhood. Internally, enlargement faces a double bind: on one hand, the rise of radical right parties in Germany, France, Italy, the Netherlands, Austria, (Alexandris, 2024) and elsewhere has intensified skepticism, linking it to fiscal costs, migration, and sovereignty debates (Armakolas & Alexandris, 2025). On the other, the standstill on internal EU institutional reforms, seen as a precondition for accepting new members under the so-called "absorption capacity", undermines credibility.

Despite repeated acknowledgment that reform is needed, there has been no tangible progress or signal that more reluctant EU Member States, often the smaller ones, are prepared to move ahead. This deadlock places the entire process at the core of today's "inflection point." Enlargement thus sits "on the edge": recognized as a necessity for strategic autonomy, yet vulnerable to politicization, budget disputes, institutional inertia, and fragmented regional dynamics.

CHALLENGES

► CLUSTER I: EU INSTITUTIONAL AND INTERNAL CHALLENGES

Budgetary constraints and fiscal alarmism

The MFF debate has made enlargement a fiscal flashpoint. While the Commission stresses "strategic investment," skeptic member states exaggerate costs. Radical right parties weaponize these concerns, ignoring evidence that costs can be managed via phased Common Agricultural Policy (CAP) and cohesion integration. If fiscal alarmism dominates, momentum could stall despite the availability of instruments like IPA III and the Growth Plan.

Internal political resistance and radical right narratives

The surge of radical right and Eurosceptic forces has politicized enlargement, particularly around migration, sovereignty, and agricultural policy. Parties like the PVV (Netherlands), RN (France), AfD (Germany), and FPÖ (Austria) position enlargement as a threat to national identity or economic stability. Without a strong counter-narrative, enlargement could become hostage to domestic electoral politics in key member states.

Decision-making deadlock

Despite the merit-based approach advocated by the EU Commission, unanimity is required in the Council which enables member states to export bilateral issues to the European level. This hampered progress by individual candidate countries is leading to growing frustration and EU skepticism and lack of reforms (Vinocur et al., 2025).

► CLUSTER II: WESTERN BALKANS REFORM AGENDA AND ENLARGEMENT TRAJECTORY

Lack of reforms in the Western Balkans

In several WB6 candidate countries, reform efforts are either stalled or superficial. Some, such as Kosovo, lack a coherent reform agenda altogether, while others are yet to embark on genuine reform trajectories (EC, n.d.). This gap is likely to widen as the reform agenda becomes increasingly demanding under the Growth Plan, further straining the credibility and momentum of the enlargement process.

Untapped Western Balkan potential for EU strategic autonomy

Despite clear contributions in defense, critical raw materials, and supply chains, the Western Balkans remain underutilized in the EU's strategic planning. The narratives around the Western Balkans' contribution to the EU are obsolete, and they are under mining the need for a speedy and credible enlargement process. Putting forward pragmatic arguments on how the Western Balkans support EU strategic autonomy is essential to convincing more reluctant audiences of the need to continue with enlargement.

► CLUSTER III: GEOPOLITICAL CHALLENGES

Geopolitical pressure and shifting momentum

The war in Ukraine and the return of Donald Trump have shifted the burden of neighborhood stability squarely onto the EU, while the new US administration offers only questionable support for the EU's required regional reforms and has cut US funding. Enlargement is now tied to Europe's security autonomy, but the momentum flows through Ukraine and Moldova. The Western Balkans, especially the frontrunners of this process, Albania and Montenegro, risk being sidelined, undermining their agency and credibility.

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RECOMMENDATIONS

Recommendations for national governments

Enhancing EU Role in bilateral dispute resolution (short term)

National governments in the WB should increase EU's visibility and role in efforts to settle bilateral disputes between member-states and candidate countries. This is important because unresolved disputes undermine trust, slow down the enlargement process, and weaken the EU's credibility in the region. To make this happen, candidate countries should actively invite EU mediation and monitoring, while member-states commit to using EU-led mechanisms as the main platform for dialogue and conflict resolution.

Advocacy and Reform Evidence to Undercut Enlargement Scepticism (short/medium term)

To counter radical-right and Eurosceptic narratives that enlargement would undermine EU governance, sovereignty, or "import corruption," WB6 governments should proactively publicize reform progress, particularly in the rule of law and anti-corruption, through visually accessible, independent scorecards and public dashboards. At the same time, governments should work with initiatives such as think nea - New Narratives of EU Integration, as well as think tanks and knowledge hubs, to craft realistic arguments and pursue strategic advocacy tailored to EU institutions and key member-states. Together, these efforts will provide both the evidence and the narrative needed to effectively address enlargement scepticism.

Alignment with EU's Economic Security Strategy (medium term)

Align with the EU's Economic Security Strategy by 1) adopting foreign direct investment screening in strategic sectors, 2) aligning with the Foreign Subsidies Regulation and the Directive on the Resilience of Critical Entities, 3) strengthening alignment with trade measures and sanctions, 4) seek technical support and inclusion in EU information exchange and cooperation mechanisms. This would help close the gap between WB6 and the EU on economic security, addressing vulnerabilities exploited by actors such as Russia and China while also countering narratives that the region is a liability rather than a contributor to EU resilience.

Recommendations for regional bodies

WB6 industrial upgrading and investment prospectus (short to medium term)

Facilitate a WB6 "industrial upgrading" programme (6-24 months) that links clustering and re-organization of supply chains to the EU market and global challenges. In parallel, build a regional investment prospectus (0-6 months) aggregating de-risked, investable projects in CRMs and defense manufacturing, packaged for the EU, EIB, and private investors. This

directly responds to the challenge of untapped WB6 potential by showcasing how the region can contribute to European strategic autonomy, particularly in critical raw materials and defense supply chains.

“Strategic Assets” taskforce (short term)

Establish a regional “Strategic Assets” taskforce (0-6 months) to share intelligence on dependency risks, regional cooperation in CRM and other economic security-related areas, and discuss joint solutions. This addresses the challenge of external influence of third actors, reducing dependency risks and reinforcing the EU’s leverage over its immediate neighborhood.

Cross-Border civic platforms for reconciliation (short/medium term)

Institutionalize cross-border civic platforms (6-24 months) funded by regional instruments to foster inter-ethnic reconciliation and joint economic initiatives that lower the domestic political salience of nationalist narratives. This responds to the lack of reforms and persistent bilateral disputes in the WB6, helping to build societal trust, reduce nationalist rhetoric, and create bottom-up momentum for the enlargement process.

Recommendations for EU institutions

Strategic Communication and Confidence-Building to Strengthen Public Support for Enlargement (short to medium term)

To address persistent skepticism in both the WB6 and EU member states, a comprehensive communication strategy should combine three strands of action:

- 1.** Public communication and confidence-building in the WB6: Invest in campaigns that highlight the tangible benefits of EU accession, such as jobs, infrastructure, and improved standards, while linking them directly to EU-funded projects. Complement this with rapid confidence- and cooperation-building measures between contested governments, including pragmatic trade pacts, renewed interstate dialogue, discussions on minority rights, and small-scale cross-border projects that visibly foster trust.
- 2.** Civic education, media outreach, and counter-disinformation: Support civic education and independent media initiatives (including social media) to demystify EU accession stages and their local payoffs, while actively countering disinformation and strengthening EU-friendly narratives across communities.
- 3.** Targeted counter-narratives and strategic communications in the EU: Launch tailored communication efforts in skeptical EU member states, focusing especially on rural constituencies and net contributors. Ground campaigns in localized impact studies (e.g., jobs created, labor shortages filled), translated into all EU languages, and delivered through trusted partners like SMEs, farmers’ unions, and chambers of commerce. Consistently framing enlargement as a high-return strategic investment will undercut adversarial narratives and emphasize the risks of inaction.

Strategic investment and resilience dialogue with the WB6 (medium term)

Launch a tailored strategic investment and resilience dialogue with the WB6, creating a package that explicitly links EU funding initiatives (e.g., IPA and Growth Plan) to projects aimed at reducing dependency on third-party actors. This approach reinforces strategic autonomy while promoting targeted investment and long-term resilience in the region.

Detailed accession budget annex with phased CAP/cohesion integration (long term)

The European Commission and Council should prepare a dedicated enlargement annex in the 2028-2034 MFF, with gradual phasing-in of CAP and cohesion funds for new members. This annex should include performance-based conditionality and clear ceilings, making the fiscal impact transparent and manageable for current member states in order to neutralize alarmism in domestic EU politics and incentivize beneficiaries to align and improve their funds management systems.

Recommendations to other international partners supporting WB6 in their EU accession process

Blended-finance and co-financing for strategic investment (short/medium term)

Deploy blended-finance instruments, risk guarantees, and co-financing mechanisms through regional financial institutions such as the Western Balkans Investment Framework (WBIF), the Regional Cooperation Council (RCC), the Transport Community, and in partnership with the European Investment Bank and the European Bank for Reconstruction and Development. This should support both small-scale private investment in critical raw materials and defense capacity, and large-scale infrastructure projects such as transport corridors enhancing military mobility and regional supply-chain integration. All funding should be tied to conditionality on procurement transparency and local value-chain development. This approach would both de-risk and mobilize private capital, while countering fiscal alarmism in the EU by showing that enlargement-linked investments are strategic, rules-based, and economically beneficial, and by limiting space for external influence from Russia and China.

CROSS-CUTTING ASPECTS

Prioritize visible wins:

Start with 3-4 short-term projects that produce measurable benefits within 6-12 months to change narratives and build momentum e.g., pooled procurement for a critical defense item; a jointly managed CRM survey with EU technical backing; a small cross-border economic or environmental project)

Use existing instruments fast:

Explicitly tie proposals to IPA III, the Growth Plan, the CRMA, and SAFE to unlock funding and technical assistance quickly.

Communications discipline:

Require every actor (WB6, regional body, EU) to publish simple, comparable dashboards of progress and costs to pre-empt fiscal alarmism and mis/disinformation.

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Turkey Programme

Between Power and Paradox: Militarisation, Defence Ambitions, and Turkey's Strategic Struggles

Turkey's Defence Industry and the EU SAFE Regulation

Indispensable Enemies: The Shifting Dynamics of Israeli-Turkish Relations

Contesting Hegemony: Opposition Strategies and Structural Constraints in AKP-Era Turkey

Between Power and Paradox: Militarisation, Defence Ambitions, and Turkey's Strategic Struggles

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- Turkey occupies a distinctive position—geographically proximate to the epicentres of regional crises and institutionally is embedded in Western security structures such as NATO.
- However, Turkey is more than a geopolitical bridge; it has emerged as a multidimensional actor with ambitions to act both as a regional stabilizer and as a global mediator.
- Turkey's position within this evolving global order is both advantageous and inherently paradoxical. As a long-standing NATO member, Turkey remains structurally embedded in the Western security architecture. Yet its geostrategic identity—historically, culturally, and geographically intertwined with the volatile landscapes of Eurasia, the Middle East, and North Africa—drives it to adopt a multi-vector foreign policy.
- From an economic standpoint, Turkey's position remains marked by deep-seated contradictions. While its customs union with the European Union and strategic access to multiple regional markets confer structural advantages, these are significantly offset by institutional fragility, regulatory ambiguity, and elevated geopolitical risk premiums.
- Turkey's defence industry has evolved into more than a military instrument; it is now a key lever for diplomatic influence and geopolitical ambition. Positioned at the heart of NATO, yet often at odds with its Western allies, Ankara has expanded its strategic footprint across the Middle East, North Africa, and the Caucasus by leveraging domestically-developed military platforms.

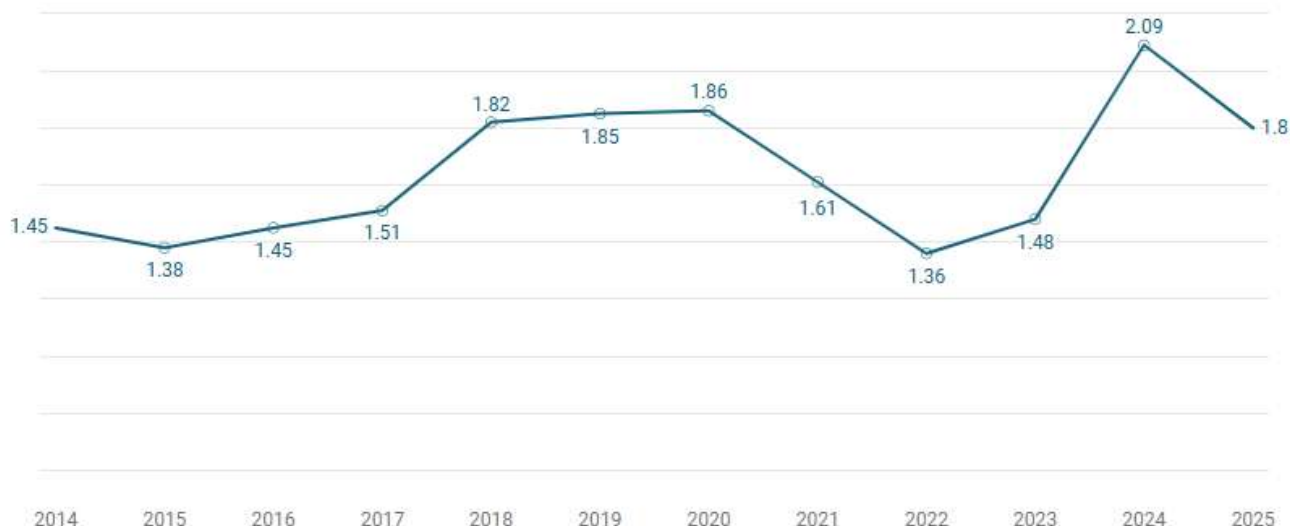
THE INTERNATIONAL SYSTEM HAS BEEN UNDERGOING a profound transformation, marked by increasing complexity and unpredictability, for a long while (Ulgen 2022). This evolution has revalidated the core assumptions of the neorealist paradigm (Hyde-Price 2015), which emphasizes power dynamics, security imperatives, and systemic uncertainty (Kessler and Daase 2008). Russia's full-scale invasion of Ukraine in 2022 not only disrupted the European security architecture, it also destabilized global economic equilibria by triggering energy crises, disrupting trade routes, and exacerbating food insecurity (Panchuk 2024). Similarly, the protracted civil war in Libya—fuelled by multifaceted proxy dynamics—has reshaped geopolitical calculations across North Africa and the Eastern Mediterranean, with significant implications for energy geopolitics and maritime jurisdiction issues (Zoubir 2020). In the Horn of Africa, the intensifying competition between Somalia and Ethiopia is extending beyond bilateral frictions to reflect broader strategic rivalries involving Gulf actors, China, and the United States (Møller 2009). These regional crises have direct consequences for international capital flows, infrastructure development, and trade corridors. These developments and others have in fact led to significant changes in the foreign policies of countries with historically heightened concerns about ontological security—with Turkey first and foremost among them, both geographically and politically (Alpan and Ozturk 2025).

However, the strategic concerns of a country like Turkey are not amplified solely by the factors outlined above; there are more. For instance, the Hamas-led attack on Israel on 7 October 2023, and Israel's sweeping military response in Gaza, have deepened volatility across [the Middle East](#), drawing Iran further into an escalating regional confrontation. The ensuing conflict between Israel and Iran not only represents a military flashpoint; it also poses risks to [global energy markets](#), investor confidence, and regional financial stability. These dynamics have been further complicated by the start of [Donald Trump's second term](#) in the Oval Office and the electoral ascendance of far-right political forces across Europe (Georgiadou, Rori and Roumanias 2018). Such developments threaten to undermine the normative foundations of the transatlantic alliance and raise fundamental questions about the future of collective security, institutional cooperation, and liberal economic governance.

Reflecting these escalating security challenges, the most recent NATO summit concluded with an agreement to incrementally increase member states' defence expenditures to [5 percent of GDP](#)—a significant rise from previous commitments. This decision underscores the gravity of the security environment and signals that even established alliances anticipate more turbulent and resource-intensive times ahead, heightening the pressure on member states, including Turkey, to bolster their military and strategic capabilities. Undoubtedly, this situation will affect fragile economies even more negatively. From a neorealist standpoint, this turbulent environment underscores the anarchic structure of the international system (Nedal and Nexon 2019), wherein states—faced with uncertain alliances and eroding norms—seek to maximize their relative power and security through self-help mechanisms. Military build-ups, strategic autonomy in defence production, and regional balancing behaviour have become key instruments of

statecraft. Crucially, economic capacity has become inextricably linked with strategic power: fiscal sustainability, industrial resilience, energy security, and technological sophistication now shape the contours of national strength.

Türkiye's Defence Budget as a Share of GDP



Source: Secretary General Annual Report, 2024, NATO, 2025 figure is an estimate

Turkey occupies a distinctive position—geographically proximate to the epicentres of regional crises, but also institutionally embedded in Western security structures such as NATO. Yet Turkey is more than a geopolitical bridge; it has emerged as a multidimensional actor with ambitions to function as both a regional stabilizer and a global mediator.

Against this backdrop, Turkey occupies a distinctive position—geographically proximate to the epicentres of regional crises, but also institutionally embedded in Western security structures such as NATO. Yet Turkey is more than a geopolitical bridge; it has emerged as a multidimensional actor with ambitions to function as both a regional stabilizer and a global mediator (Sofos 2022). However, there are structural constraints on the implementation of this aspiration. Domestically, enduring challenges related to democratic backsliding (Cinar 2018), [institutional fragility](#), and [economic vulnerability](#) limit Turkey's strategic agility. Externally, Ankara's dynamic and multifaceted foreign policy and defence initiatives—such as the development of indigenous [UAV/UCAV technologies](#), the [KAAN fifth-generation fighter program](#), and participation in multilateral platforms like [ReArm Europe](#)—reflect a desire to strengthen its deterrence capabilities. Nevertheless, these initiatives often face [diplomatic pushback](#), de facto arms embargoes, and technological bottlenecks, illustrating the gap between strategic ambition and systemic capacity.

In addition, crucially, these transformations are unfolding at a time when Turkey is grappling with mounting economic challenges, including entrenched inflation, persistent current account deficits, and waning investor confidence. These structural vulnerabilities significantly limit the scope for coherent long-term strategic planning and complicate Ankara's ability to underwrite its regional aspirations. The erosion of macroeconomic stability—evidenced by sustained inflationary pressures, capital flight, and pronounced currency volatility—undercuts both the credibility and consistency of Turkey's foreign policy endeavours. In this context, the country's strategic orientation is shaped not by geopolitical imperatives alone, but increasingly by its capacity for economic resilience and adjustment.

Grounded in this comprehensive background, this paper underscores the necessity and timeliness of critically assessing Turkey's evolving role within an increasingly fractured and multipolar international order. At a time when conventional security frameworks are being recalibrated, regional conflicts are intensifying, and the normative foundations of the liberal international system are eroding, [Turkey stands at the nexus of numerous geopolitical fault lines](#). Its geographic position, growing defence ambitions, and assertive foreign policy posture—coupled with

domestic political volatility—make it a pivotal yet paradoxical actor. This analysis is rendered particularly urgent by the convergence of multiple pressures: the militarization of regional disputes, Ankara's strained relations with key NATO allies, its simultaneous pursuit of strategic autonomy and Western alignment, and the deepening entanglement of internal political developments with external security policies. Understanding how these dynamics intersect is essential not only for comprehending Turkey's future trajectory, but also for anticipating broader shifts within the Euro-Atlantic and Eurasian security architectures. In this context, the paper offers a timely and policy-relevant lens through which to evaluate the constraints, contradictions, and strategic calculations shaping Turkey's geopolitical behaviour.

New Dynamics in the Global Distribution of Power and Turkey's Position

As the 21st century enters its second quarter, the global order is marked by growing volatility and systemic fragmentation. The brief post-Cold War *unipolar moment*, which was dominated by the [United States](#), has given way to a fluid, multipolar system defined by geopolitical, economic, and technological competition. Central to this shift is the intensifying strategic rivalry between the US and [China](#) alongside the resurgence of [Russia's revisionist posture](#), the rise of far-right populism in Europe, and protracted proxy conflicts across the Middle East. Within this landscape, multipolarity reflects not only a redistribution of power but also a reconfiguration of norms, alliances, and global governance tools.

However, the global reconfiguration of economic power—reflected in evolving investment patterns, shifting regional trade architectures, and the strategic decoupling of supply chains—has also fundamentally reshaped the contours of international influence. States no longer rely solely on military power, but increasingly in their capacity to mobilize capital, steer industrial policy, and withstand systemic financial volatility. For Turkey, this transformed landscape presents a dual-edged dynamic: while geographic proximity to burgeoning markets opens avenues for deeper economic integration, persistent macroeconomic imbalances continue to constrain its ability to fully leverage these emerging opportunities.

NATO's [Madrid \(2022\)](#) and [Vilnius \(2023\)](#) summits redefined threat perceptions by framing China as a “systemic rival” and reaffirming Russia as the principal military threat. The alliance's agenda now stretches beyond conventional defence to encompass cybersecurity, energy security, disinformation resilience, and food supply stability, reshaping what constitutes strategic power. In this new order, national influence is increasingly tethered to economic robustness, technological sovereignty, and institutional coherence, redefining how states assert agency and respond to crisis.

Turkey's position within this evolving global order is both advantageous and inherently paradoxical. As a long-standing NATO member, Turkey remains structurally embedded in the Western security architecture. Yet its geostrategic identity—historically, culturally, and geographically intertwined with the volatile landscapes of Eurasia, the Middle East, and North Africa—drives it to adopt a multi-vector foreign policy.

Turkey's position within this evolving global order is both advantageous and inherently paradoxical. As a long-standing [NATO member](#), Turkey remains structurally embedded in the Western security architecture. Yet its geostrategic identity—historically, culturally, and geographically intertwined with the volatile landscapes of [Eurasia](#), the [Middle East](#), and [North Africa](#)—drives it to adopt a multi-vector foreign policy. This ambition for increased strategic autonomy is exemplified by Turkey's controversial procurement of the Russian [S-400 missile defence system](#), its growing [Eurasian alignments](#), and its proactive diplomacy in Africa. These initiatives reflect an increasingly pragmatic and transactional orientation which is often at odds with Turkey's formal Western commitments. However, this assertive diversification also reveals deep institutional limitations. The centralization of decision-making, erosion of bureaucratic expertise, and fragmentation of inter-agency coordination significantly undermine Ankara's capacity to maintain strategic coherence. As a result, Turkey struggles to convert its geopolitical advantages into sustainable regional influence, oscillating between great-power aspiration and governance constraints.

From an economic standpoint, Turkey's position remains marked by deep-seated contradictions. While its customs union with the European Union and strategic access to multiple regional markets confer structural advantages, these are significantly offset by institutional fragility, regulatory ambiguity, and elevated geopolitical risk premiums.

From an economic standpoint, Turkey's position remains marked by deep-seated contradictions. While its customs union with the European Union and strategic access to multiple regional markets confer structural advantages, these are significantly offset by institutional fragility, regulatory ambiguity, and elevated geopolitical risk premiums. Over the past decade, the country has witnessed pronounced deindustrialization in critical tradable sectors, coupled with a sustained decline in total factor productivity—developments that collectively undermine its long-term competitiveness. In an era where strategic influence is increasingly predicated on economic resilience and innovation capacity, Turkey's deficiencies in export sophistication and technological dynamism impede its evolution from a reactive player to a proactive architect of regional order.

Turkey's economic capacity has emerged as a critical determinant of the viability of its increasingly multifaceted foreign policy. Escalating inflation, persistent currency instability, a marked decline in foreign direct investment, and continued dependence on external technological inputs have collectively undermined the long-term sustainability of its defence-industrial aspirations. These structural constraints are further exacerbated by Turkey's substantial reliance on energy imports, rendering the country particularly vulnerable to external shocks—especially amid fluctuating hydrocarbon prices and evolving global energy alignments. Although projects such as the TurkStream pipeline and recent gas discoveries in the Eastern Mediterranean illustrate Ankara's intent to diversify energy sources, fiscal limitations and technological dependency have delayed their strategic benefits. Consequently, Turkey's geopolitical assertiveness is frequently constrained by its dependence on imported high-value industrial components, raw materials, and energy.

These constraints not only limit the scope of autonomous policy execution; they also expose Ankara's efforts towards defence indigenisation to indirect embargoes and political pressures—particularly from within the NATO and EU ecosystems—, thereby diminishing its institutional credibility. In this context, Turkey seeks to position itself as not just a reactive actor, but as a proactive participant in crisis diplomacy and regional stabilization. From its facilitative role in the Black Sea Grain Initiative during the Russia-Ukraine conflict to its backing of the [UN-recognized government in Libya](#) and involvement in [diplomatic negotiations on Gaza](#), Turkey has sought to assert itself as a constructive geopolitical broker.

Turkey's foreign policy ambitions cannot rest on geostrategic vision or rhetoric alone; they demand institutional depth, narrative coherence, and above all economic resilience. Also, it is crucial to remember the following: In Turkey under the leadership of President Recep Tayyip Erdoğan, domestic and foreign policy issues are often deeply intertwined. In this context, developments in domestic politics tend to influence foreign policy, while shifts in foreign policy dynamics also have significant repercussions on the domestic political landscape. Despite moments of diplomatic success, persistent structural weaknesses—limited diplomatic capacity, political volatility, and economic fragility—consistently strategic continuity. As the global order becomes more fragmented, Turkey stands at a crossroads: its geographic centrality and diplomatic agility provide real potential, but without parallel reforms in governance, economy, and institutions, its influence risks being fleeting rather than foundational.

Turkey's Defence Industry: An Emerging Power or a Compelled Defence?

Amid this complex and multi-layered landscape, President Recep Tayyip Erdoğan has sought to construct a system that he controls almost entirely at the domestic level, while simultaneously attempting to build a “national and local” defence industry. However, this dual endeavour has gradually evolved into a structure that is strong in certain respects yet significantly lacking in others.

Since the early 2000s, Turkey's defence industry has undergone a striking evolution, emerging as both a cornerstone of national security and a symbol of technological ambition. [...] platforms such as the Bayraktar TB2 have reshaped modern warfare and showcased Turkish engineering in conflicts from Libya to Nagorno-Karabakh and Ukraine. These advancements have amplified not only Turkey's hard power reach but also its soft power appeal.

Since the early 2000s, Turkey's defence industry has undergone a striking evolution, emerging as both a cornerstone of national security and a symbol of technological ambition. Institutions like ASELSAN, ROKETSAN, BAYKAR, and TUSAŞ have driven a wave of home-grown innovation, positioning Turkey as a rising military power

with increasingly autonomous capabilities. Nowhere is this more evident than in its UAV program: platforms such as the Bayraktar TB2 have reshaped modern warfare and showcased Turkish engineering in conflicts from Libya to Nagorno-Karabakh and Ukraine. These advancements have amplified not only Turkey's hard power reach but also its soft power appeal. Yet beneath the surface of success lies a structural contradiction: the persistent reliance on imported engines, electronics, and key materials reminds us that technological sovereignty remains aspirational as long as supply chains remain externally anchored.

Despite Turkey's celebrated progress in national defence technologies, structural dependencies on critical foreign components continue to undermine its strategic autonomy. A stark illustration of this fragility was [Turkey's removal from the F-35 Joint Strike Fighter program](#) by the United States in 2019, following its acquisition of the Russian [S-400 missile system](#). This exclusion not only disrupted the Turkish Air Force's modernization path; it also exposed deep-seated weaknesses in domestic production capacity. One of the projects most affected has been the development of the [KAAN National Combat Aircraft](#), which remains highly dependent on foreign technology—especially in jet engine systems. Although national institutions like [TÜBİTAK](#) and [TUSAŞ](#) are spearheading efforts to produce local engines, [technical maturity remains elusive](#), placing Turkey at a competitive disadvantage within the global aerospace industry.

The Eurofighter Typhoon case starkly illustrates the multilayered barriers confronting Turkey's quest for defence autonomy. Although Turkey joined the program in the early 2000s with ambitions of technology transfer and joint production, its integration has been shaped by political hesitation and technical bottlenecks. Over 80 percent of the aircraft's core systems—including engines, avionics, and flight controls—remain sourced from European suppliers, notably in the UK, Germany, and Spain. More recently, renewed discussions on Turkish procurement have reportedly involved political conditionalities, such as restrictions on deployment against Kurdish groups or in the context of Aegean tensions with Greece, further complicating negotiations. These dynamics reveal a structural paradox: Turkey aspires to strategic independence, yet remains entangled in deep interdependencies. Compounding this challenge is Turkey's fragile economic landscape—marked by high inflation, currency volatility, and limited fiscal space—which weakens its negotiating leverage and casts doubt on the long-term sustainability of such high-cost defence projects. Without a stable economic foundation, ambitions for defence autonomy risk remaining aspirational rather than achievable.

From a macroeconomic standpoint, the viability of Turkey's expanding defence ambitions is increasingly constrained by fiscal fragility. As of 2023, Turkey's external debt exceeds \$450 billion, inflation hovers around 60 percent, and the Turkish lira continues its volatile depreciation, driving up the cost of imported defence components. These dynamics significantly impede the localization of high-tech systems, especially in electronic warfare, precision munitions, and propulsion.

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Turkey's defence industry has evolved into more than a military instrument; it is now a key lever for diplomatic influence and geopolitical ambition. Positioned at the heart of NATO, yet often at odds with its Western allies, Ankara has expanded its strategic footprint across the Middle East, North Africa, and the Caucasus by leveraging domestically-developed military platforms.

Turkey's defence industry has evolved into more than a military instrument; it is now a key lever for diplomatic influence and geopolitical ambition. Positioned at the heart of NATO, yet often at odds with its Western allies, Ankara has expanded its strategic footprint across the Middle East, North Africa, and the Caucasus by leveraging domestically-developed military platforms. These capabilities have enabled intervention, mediation, and deterrence—but also intensified friction with traditional partners over issues like the S-400 purchase, sanctions, and arms embargoes. In response, Turkey has cultivated alternative defence partnerships with states such as Qatar, Pakistan, and Azerbaijan—an intentional pivot toward a multipolar order in which Ankara seeks to shape, not follow, global security dynamics. The launch of the TCG Anadolu, a drone-capable amphibious assault vessel, and the combat-tested success of UAVs like the Bayraktar TB2, exemplify Turkey's bid for power projection and defence innovation.

Yet beneath these advances lie unresolved structural vulnerabilities. Turkey remains heavily dependent on imported engines, semiconductors, and electronic warfare components—dependencies that constrain its strategic autonomy. Economic fragilities, including foreign currency volatility and constrained R&D funding, further limit its ability to scale and sustain this momentum. As a result, Turkey's defence assertiveness risks outpacing its economic and industrial foundations.

Authoritarianism and Geopolitical Capacity: Theoretical and Empirical Dimensions

The interconnection between domestic political structures and foreign policy outcomes has become a defining principle in contemporary international relations, underscoring how internal governance dynamics shape a state's external behaviour. In Turkey's case, democratic backsliding—characterized by the erosion of judicial independence, suppression of media freedom, and the marginalization of political opposition—has significantly weakened institutional resilience and diminished international credibility. This authoritarian drift is evident in politically charged trials against figures such as Istanbul mayor Ekrem İmamoğlu, sustained government pressure on influential business associations like TÜSİAD, and the silencing of dissent within academia and the press.

These developments have not only narrowed the space for political pluralism—an essential component of democratic legitimacy; they have also eroded Turkey's normative appeal and soft power, particularly within multilateral institutions such as the Council of Europe. The institutional degradation extends beyond civil liberties, affecting key bureaucratic and strategic organs. The Ministry of Foreign Affairs, once a cornerstone of Turkish diplomatic competence, has seen its autonomy curtailed and its operational coherence strained under an increasingly centralized presidential system. Similarly, the credibility of the Central Bank has been undermined by political interference, complicating efforts to rein in inflation.

Although the appointment of Mehmet Şimşek signalled a tentative return to orthodox economic policymaking, the program faces structural challenges—most notably, the disconnect between the long-term nature of stabilization and the short-term urgency of political expectations. Inflation remains stubbornly high, and while some investor confidence has returned, it remains fragile amid ongoing institutional volatility. These economic constraints directly impact Turkey's capacity to project consistent and credible influence abroad, further entrenching the feedback loop between domestic fragility and external limitations.

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Likewise, [economic governance institutions](#) struggle with mounting fiscal pressures, ad hoc decision-making, and inconsistent coordination across government branches—all of which limit Ankara's ability to formulate and execute coherent foreign policy strategies. These dynamics reflect a growing consensus in international relations: without strong domestic institutions, no state can sustain a credible, consistent, or effective foreign policy. When democratic legitimacy, strategic foresight, and institutional robustness are absent, a country's global standing erodes (Ozturk 2021). In Turkey's case, foreign policy limitations are no longer primarily the result of external shocks—they are

increasingly self-inflicted. A governance model driven by short-term centralization over long-term planning has weakened the state's ability to act as a reliable and norm-abiding international actor. The dismantling of checks and balances, the erosion of the rule of law, and the personalization of executive power have collectively undercut Turkey's capacity for international leadership. As leading theorists have long argued, global influence tends to mirror domestic stability. Without transparency, meritocracy, and accountability at home, sustained diplomatic credibility abroad remains elusive.

This strategic paradox is especially stark in Turkey's simultaneous pursuit of regional leadership and slide into authoritarianism. While Ankara has achieved significant milestones in defence—most notably with UAVs like the Bayraktar TB2—these successes are undermined by unresolved technological dependencies, exposure to sanctions, and a weak innovation ecosystem. Turkey's exclusion from the F-35 program is a case in point: a foreign policy consequence rooted in internal political choices. At the same time, deepening polarization and rising authoritarianism continue to hollow out the institutional base required for values-driven, rules-based foreign policy. This contradiction echoes a central dilemma in neorealist thought: the pursuit of power abroad constrained by dysfunction at home.

Turkey's future as a consequential geopolitical actor depends not only on its external posture, but also—and, perhaps, to a greater extent—on its internal reform trajectory. The link between democratization and foreign policy capacity is now, to a greater extent, structural, not voluntary. A growing body of empirical research affirms that institutional resilience and democratic governance are the bedrock upon which international credibility and sustained strategic engagement are built. In Turkey's case, revitalizing judicial independence, restoring media freedom, and safeguarding civil liberties would not only stabilize domestic politics; they would also rebuild diplomatic legitimacy. Without such reforms, Turkey's claims to regional leadership will continue to ring hollow. The strategic imperative is unmistakable: domestic reform must precede external ambition.

The trajectory of Turkey's defence sector illustrates this tension vividly. The 2019 decision to acquire the Russian-made S-400 missile system in the face of strong NATO objections triggered sweeping sanctions from the United States, including Turkey's expulsion from the F-35 program. These sanctions cost Turkey an estimated \$9 billion in lost revenue and delayed the modernization of its air force by years. More broadly, they severed access to key aerospace technologies and components, exposing critical vulnerabilities in Turkey's defence supply chains. These disruptions have seriously impacted the operational readiness and long-term viability of Turkey's military modernization agenda.

The fallout has been particularly acute in legacy systems like the F-16 fleet, where embargoes on avionics and engine parts have driven up costs and reduced operational capability. Experts estimate a 15-20 percent drop in readiness for key aerial platforms. In response, Ankara has ramped up investments in domestic production—especially in drones, missile systems, and naval assets. Yet despite notable advances by firms such as BAYKAR, ASELSAN, and TUSAŞ, efforts toward self-reliance remain hamstrung by technological bottlenecks, insufficient R&D capacity, and ongoing exclusion from Western defence networks.

These strategic constraints have been magnified by strained relations with major European powers—particularly Greece, France, and Germany. The Eastern Mediterranean and Aegean have become militarized flashpoints, with defence spending in the region rising by over 25 percent over five years. France's naval deployments and [Germany's military aid to Greece](#) have fuelled Ankara's perception of encirclement, prompting muscular responses ranging from intensified naval patrols to aggressive diplomacy. To counterbalance Western isolation, Turkey has cultivated closer ties with countries like Qatar, Pakistan, and Azerbaijan, and expanded its role in multilateral initiatives like the Organisation of Turkic States. Yet these steps offer limited strategic depth and cannot replace the geopolitical capital once derived from robust engagement with NATO and the EU.

The long-term resolution of this structural impasse lies in a political reset domestically. Should Turkey undertake serious reform—restoring judicial independence, ceasing to repress dissent, and reinvigorating media pluralism—it could begin to rebuild trust with Western allies and reposition itself as a credible regional power. The goal of forming

a “security community” based on trust, dialogue, and conflict resolution would become increasingly achievable. The political science literature consistently demonstrates that democratization fosters foreign direct investment, strengthens diplomatic partnerships, and deepens economic integration. Empirical studies show that improved governance can increase FDI inflows by up to 15 percent annually in transitioning economies—resources that could sustain defence modernization and broader economic transformation.

Beyond economic gains, democratization would reduce Western scepticism about Turkey’s reliability as a strategic partner. It would unlock avenues for defence cooperation, technological exchange, and deeper institutional integration with Euro-Atlantic structures. Lifting sanctions, rejoining procurement programs, and restoring Turkey’s role in collective defence initiatives would follow. This, in turn, would reduce Turkey’s exposure to embargo-induced shocks and enhance its influence in conflict zones such as Ukraine, Libya, the Caucasus, and Gaza.

Turkey’s current geopolitical constraints—external sanctions, regional tensions, and internal authoritarian drift—are not inescapable. They are symptoms of a deeper structural misalignment between its internal governance and external ambitions. A return to democratic pluralism, institutional integrity, and transparent governance is more than an idealistic proposition—it is a strategic necessity. Only through reform, not confrontation, can Turkey convert its latent potential into lasting, rules-based power in a multipolar world. Alongside political reform, Turkey must also address its structural demographic and economic challenges. Strategic influence in the 21st century hinges not just on military strength; it also depends on human capital, education quality, and technological innovation. Yet Turkey faces mounting pressure in these areas, with high youth unemployment, low female labour participation, and a deepening brain drain. Reversing these trends requires a long-term industrial strategy, targeted education reform, and regional employment programs. Without integrating economic and demographic planning into a cohesive strategic vision, Turkey’s goals of technological autonomy and regional leadership will remain constrained not by external rivals, but by internal inertia.

Conclusion and Policy recommendations

Turkey’s recent investments in its defence industry reflect both a rational response to global volatility and a strategic effort to enhance national resilience. In an era marked by geopolitical fragmentation, escalating conflicts, and waning multilateralism, Ankara’s drive toward military self-sufficiency—particularly in areas like UAV technology, missile systems, and naval capabilities—offers not only national security benefits, but also the possibility of Turkey acting as a stabilizing force beyond its borders. As European security architectures are increasingly strained and regions like the Middle East, the Caucasus, and the Eastern Mediterranean face heightened instability, Turkey is uniquely positioned to contribute to reducing regional tensions by maintaining equilibria and providing humanitarian support. However, to fully realize this potential and translate military capacity into sustainable strategic influence, several foundational issues must be addressed.

Turkey must enhance its democratic capacity at home. A resilient democracy—grounded in the rule of law, judicial independence, media pluralism, and civil liberties—is more than a normative ideal; it is a prerequisite for long-term strategic credibility.

First, Turkey must enhance its democratic capacity at home. A resilient democracy—grounded in the rule of law, judicial independence, media pluralism, and civil liberties—is more than a normative ideal; it is a prerequisite for long-term strategic credibility. Democratic legitimacy strengthens foreign policy coherence, facilitates international partnerships, and enhances the soft power necessary for conflict mediation and regional diplomacy. Without internal reforms of this sort, Turkey’s external actions will continue to be viewed with scepticism, particularly by Western allies whose cooperation remains vital for technological collaboration and institutional integration.

Turkey must articulate a clear strategic rationale to underpin its defence investments. This involves moving beyond reactive threat perceptions and developing a holistic framework that aligns defence policy with broader developmental and diplomatic objectives.

Second, Turkey must articulate a clear strategic rationale to underpin its defence investments. This involves moving beyond reactive threat perceptions and developing a holistic framework that aligns defence policy with broader

developmental and diplomatic objectives. In this context, two interrelated concepts are paramount: economic security and open strategic autonomy. Economic security ensures that defence development is underpinned by a stable macroeconomic foundation, robust innovation ecosystems, and inclusive growth. Open strategic autonomy, meanwhile, allows Turkey to pursue sovereign policy choices while maintaining constructive engagement with both Western institutions and non-Western partners. Crucially, these two pillars must operate in tandem. Our recommendation is that rather than severing its historical ties with the Western bloc, Turkey should strengthen its institutions, economy, and democracy in order to gain greater strategic flexibility. This would enable Turkey to enhance its capabilities—particularly in the field of defence—while also increasing its influence across a range of other domains. A defence posture rooted in economic security enhances industrial sustainability and innovation, while open strategic autonomy ensures that sovereignty does not come at the cost of isolation. This dual approach not only supports Turkey’s strategic flexibility; it also encourages democratic consolidation and institutional development, creating a virtuous cycle in which internal governance reform and external credibility reinforce one another.

Turkey’s ambitions to act as a “balancing power” or “regional stabilizer” are both timely and attainable, but only if pursued through a coordinated, multi-dimensional strategy. Defence modernization, democratic reform, economic resilience, and strategic autonomy should be viewed not as separate tracks, but as mutually reinforcing components of a coherent national vision. A Turkey that invests in its people, renews its institutions, and positions its defence capabilities within a transparent and accountable strategic framework will be far better placed to engage with Western partners on an equal footing and to shape regional dynamics in a constructive, stabilizing manner. The future of Turkey’s geopolitical influence therefore lies not solely in its arsenal, but in the strength, legitimacy, and foresight of the state that wields it.

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Turkey's Defence Industry and the EU SAFE Regulation

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- From Ottoman-era modernization through to its advanced capabilities today, Turkey has transformed itself into a major global defence exporter, with \$6.3 billion in exports in 2024 and flagship products like the Bayraktar TB2 drone.
- Turkey leverages its NATO membership and geographic position to strengthen defence ties and secure influence in alliance decision-making, while at the same time contributing to the Alliance advanced technologies.
- The EU's Security Action for Europe (SAFE) initiative allocates €150 billion for joint defence procurement to boost Europe's defence industrial base, reduce reliance on non-EU suppliers, and enhance interoperability.
- Ankara's SAFE participation rationale rests on enabling technological collaboration, market access, and stronger EU ties, leveraging Turkey's expertise in drone systems, cybersecurity, and unmanned technologies.
- Turkey's SAFE participation should remain conditional on Ankara improving its bilateral political relations with member states, and on making explicit assurances on the inviolability of the sovereignty and territorial integrity of all EU member states.

Introduction

During NATO Summits, it is customary for leaders to engage in bilateral meetings on issues of common concern to coordinate policy or clarify policy positions. The 2025 NATO Summit in the Hague was no exception, with US President Trump dominating the spotlight on account of his reluctance to assure the US's European allies of his country's commitment to Article 5 (NPR 2025). The meeting between the US President and his Turkish counterpart, Tayyip Erdoğan, attracted a lot of media attention and confirmed the positive personal relations between the two leaders (*Hürriyet Daily News* 2025). More importantly, the fact that cooperation in the defence industry was explicitly included in the talks speaks volume about the evolution of Turkey's defence industry over time, and its added value for the country's economic, diplomatic and military status.

Over the past two decades, Turkey has emerged as a key player in the global defence landscape.

Over the past two decades, Turkey has emerged as a key player in the global defence landscape. It has done so in the context of increasing self-reliance, as it seeks to position itself as an emerging regional power and deepen both its sales volume and capacity to act independently of prior commitments or treaty-based obligations. This transformation is exemplified by the development of its domestically-produced Bayraktar TB2 drones, which have reinforced Turkey's military capabilities but also been exported to countries such as Ukraine and Azerbaijan, showcasing Turkey's technological prowess. TB2s have also allowed Ankara to enhance its leverage in the Russia-Ukraine war, and became the world's most exported drone in 2024 (Defence Security Asia 2024). As Turkey aspires to deeper integration with the newly-created SAFE (Security Action for Europe) Regulation of the European Union (EU), the opportunities and challenges for its defence industry, as well as for Europe, multiply.

This paper begins by dissecting the opportunities and obstacles which participation in European defence initiatives (with a specific focus on SAFE) present for Turkey, while contextualizing the discussion within Turkey's historical defence innovation journey and the state of its relationship with the European Union. The next section offers a historical context, exploring the evolution of Turkey's defence industry over time and emphasizing the longevity of this complex project. The following section analyzes the growth of Turkey's defence industry in the context of its NATO membership and outlines some of the advantages the country's membership of the Alliance has brought with it. The next section presents a structured discussion of the SAFE Regulation, analysing its objectives and structure as well as its relevance to Turkey's defence policy and innovation strategies. Opportunities and challenges follow in the subsequent sections. The paper details the potential benefits of Turkey's engagement with SAFE, including technological partnerships and financial incentives. At the same time, it draws attention to the hurdles Turkey faces, and is likely to continue to face, in aligning with European defence frameworks; these range from political trust-building and technical compatibility to geopolitical tensions. Prior to its conclusion, the paper offers specific policy recommendations on how to shape the EU-Turkey relationship in the defence field while navigating the relationship's multiple political and diplomatic complexities.

Historical Context of Turkey's Defence Industry

The roots of Turkey's defence industry can be traced back to the Ottoman era, when military innovation was the Empire's first concrete act aimed at modernizing and prolonging its existence (Levy 2006). The Ottoman leadership understood the need to import technological know-how from the then dominant European states and do so in the military field in order to maintain operational capacity and prevent the Empire's collapse. Although the latter proved impossible, it is no coincidence that the modernization and westernization of Ottoman structures, which were mostly inspired by Germany's principles of operation, was initiated by the military and geared towards what would today be interpreted as the defence industry. During the early years of the Republic, reliance on foreign suppliers was significant and Turkey was largely unable to invest in the sector, which slowed down the development of the domestic defence industry (Özlü 2021).

The defence-industrial complex of today began to emerge in the late 20th century in line with a policy aimed at combining NATO membership with a more robust defence industry. Institutionally, the origins of change go back to the Cold War period, however, when companies such as ASELSAN and TUSAŞ were set up in the 1970s and 1980s respectively. They marked the beginning of a domestic focus on defence technology, which accelerated following the imposition of the US arms embargo on Turkey in 1975. These efforts were further reinforced by legislative measures, such as the Defence Industry Law of 1985, which aimed to enhance indigenous production capabilities. That law facilitated the creation of a structured framework for defence procurement and manufacturing, establishing financial incentives for domestic companies, and encouraging collaboration between the public and private sectors. It also mandated the prioritization of local resources and expertise to reduce dependency on imports, making the Undersecretariat for Defence Industries (SSM) the primary institution for enacting that policy (Wicaksono and Perwita 2020: 54). The implementation of these policies provided the defence industry with a clear roadmap and fostered an environment conducive to innovation and sustained growth. Over time, this institutional foundation enabled Turkey to produce advanced technologies such as drones, naval warships, and missile systems, laying the groundwork for its modern defence capabilities.

During the 1990s, Turkey's prioritization of domestic supplies for its own defence industry became manifest. At that time, Turkey's tumultuous relations with neighbouring states and the sanctions imposed on it by western states led to a decision to initiate long-term strategic investments in the sector, in order to reap the benefits of the approach in later years. By investing heavily in research and development, Turkey was able to launch domestic production projects for drones, armoured vehicles, naval warships, and missile systems (Baysal 2025). Today, notable products such as the Bayraktar TB2 drone and T129 ATAK helicopter have gained international recognition for their capabilities. It is important to note that Turkey's military products carry the "distinction" of being battle-tested, given Turkey's multiple war fronts and military operations in its near abroad. For potential buyers, this constitutes an added advantage, as the Turkish armed forces have already tried and tested the products before they are made available for export.

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In the early 2000s, a paradigm shift was introduced by Turkey's political and military decision-makers. Strategic investments were made in research and development, bolstered by partnerships between public institutions and private companies (Demir 2020). The period of rapid economic growth in the first decade of the 21st century enabled large-scale public investment in Research and Development, the fruits of which Turkey is still enjoying to this day. This transformation was driven by geopolitical pressures, including sanctions on Ankara imposed by western powers and the need for operational independence in regional conflicts. At the same time, Turkey's discourse on cultivating domestic defence production also serves political ends, in so far as it allows for the deepening of nationalist sentiment and despite the need for consolidation that the sector is exposed to (Kurç et al. 2025). Even so, there is little doubt that the defence industry that Turkey relies on today did not result from the vision of a single leader or party, but is the product of decades of strategic planning and innovation, which included setbacks and mistakes along the way.

Today, Turkey has not only achieved prominence through its cutting-edge drone technology, it has also diversified its export portfolio to include a wide range of defence products such as armoured vehicles, naval corvettes, and advanced communication systems. Turkish firms such as Aselsan, Roketsan, and Havelsan have secured deals to supply electronic warfare systems and smart munitions to countries including Pakistan, Qatar, and Malaysia. The export of MILGEM-class corvettes to the Pakistani Navy and the delivery of T129 ATAK helicopters to the Philippines underscore Turkey's ability to compete in complex, high-value segments of the global arms market (Rakesh 2022).

In 2023 alone, Turkish defence exports exceeded \$4 billion, making it one of the fastest-growing exporters in the global arms market; by 2024, the figure had risen to \$6.3 billion.

Beyond individual sales, Turkey has increasingly focused on strategic partnerships and technology transfer agreements with Western defence companies. Collaborations with European firms, such as joint ventures between Turkish Aerospace Industries (TAI) and Airbus, have broadened Turkey's access to aerospace technologies and global supply chains. Additionally, Turkish defence companies have participated in co-development projects with Italy's Leonardo and the UK's BAE Systems, most notably in the ongoing development of the TF-X next-generation fighter jet. These agreements facilitate the exchange of technical expertise, but also open new avenues for Turkish firms to integrate with European defence ecosystems. Importantly, they also create the sort of cordial political atmosphere in which arguments for including Turkey in SAFE sound rational. In 2023 alone, Turkish defence exports exceeded \$4 billion, making it one of the fastest-growing exporters in the global arms market; by 2024, the figure had risen to \$6.3 billion (Kuyucak 2025).

Leveraging NATO membership

As an Alliance member since 1952, Turkey has contributed to several NATO missions, deploying troops, hosting military bases, and sharing intelligence pivotal to counter-terrorism operations. In recent years, Turkey's focus on cybersecurity and unmanned systems has provided NATO with solutions to modern challenges (Akgül-Açıkmeşe and Aksu 2024). The country's expertise in drone technology has been particularly noteworthy, with its UAVs gaining recognition for their operational effectiveness and adaptability to various conflict scenarios. Turkey's cybersecurity initiatives have also enhanced NATO's ability to safeguard its networks against increasing cyber threats, demonstrating the country's forward-thinking approach to emerging security dimensions. Turkish defence exports to NATO and partner countries reinforce political relationships and create interdependencies that enhance Turkey's negotiating position within the Alliance. This leverage was evident in Turkey being able to insist on technology transfer and joint production in major procurement programs, such as the modernization of tanks and aircraft. These stipulations often shape NATO's broader industrial cooperation and encourage the alignment of Alliance standards with Turkish capabilities.

Additionally, Turkey utilizes its geographic and technological assets to push for a greater role in NATO's strategic decision-making. Its control over key logistical corridors and access to critical regional intelligence mean that Turkish support is often essential for the success of collective operations. By coupling its defence production prowess with its pivotal location, Turkey can ensure its interests are considered in Alliance planning. In leveraging its defence industry, Turkey enhances the operational strength of NATO, but also ensures that its national interests are served. In other words, Turkey leverages its modern and capable defence industry in the NATO context to attain broader objectives. Turkey's defence industry should not, therefore, be viewed in isolation from its foreign policy objectives, but rather in the broader context of Ankara's regional ambitions and willingness to capitalize on the nation's location and resources that may appear only remotely linked to its defence industry.

As a longstanding member of the Alliance and one of its largest standing armies, Turkey often underscores its self-proclaimed role as a security anchor on NATO's southeastern flank, while also providing a bridge between Europe, the Middle East, and the Black Sea. In recent years, Turkey's investment in indigenous defence technologies has enabled the country to support NATO missions with advanced, homegrown equipment, enhancing both operational flexibility and Alliance resilience. The development and fielding of Turkish-made drones, such as the aforementioned Bayraktar TB2, have provided NATO with proven assets in intelligence, surveillance, and reconnaissance (ISR) operations. These platforms have been tested in multiple conflict zones, including Syria and Libya. Turkish unmanned aerial vehicles (UAVs) have enabled NATO allies to benefit from interoperable systems that can be quickly integrated in joint operations and exercises. It has also been frequently argued that Turkey's expertise in electronic warfare, smart munitions, and secure communications has expanded NATO's technological toolbox, particularly in areas where timely, reliable information and rapid responses are crucial. Turkish firms supply a range of command-and-control, radar, and defensive countermeasure systems that have been deployed in alliance exercises and operations (Kasapoğlu and Özakaraşahin 2024).

Turkey's stance on the Russia-Ukraine war and longstanding disputes with both EU and NATO members have not deterred NATO partners from deepening cooperation with Ankara in an attempt to expand mutual defence ties and allow for mutual benefit through technology transfer and knowledge exchange.

Politically, Turkey's stance on the Russia-Ukraine war and longstanding disputes with both EU and NATO members have not deterred NATO partners from deepening cooperation with Ankara in an attempt to expand mutual defence ties and allow for mutual benefit through technology transfer and knowledge exchange. To illustrate, Turkey and Finland signed a memorandum of understanding to boost cooperation through joint technology development and joint production in June 2025 (Helsinki Times 2025), and a similar deal has been agreed between Turkey and Romania (Blank 2025). These come in the wake of similar agreements between NATO and EU member states such as Italy, Spain and the UK, as well as expanding ties with Central and East European members (Waldwyn 2024).

The SAFE Regulation in Context

The Security Action for Europe (SAFE) was proposed in direct response to an increasingly unstable security landscape. The ongoing Russian war against Ukraine, coupled with Russia's shift to a wartime economy, has significantly heightened the threat environment, leading to worrying debates as to the possibility of further acts of military aggression committed by Russia against European states. EU leaders recognized that Europe must take a major leap forward in its defence capabilities—not just in support of Ukraine, but also to protect the Union's own sovereignty and bolster its resilience (European Commission 2025). In that context, SAFE is one of five pillars in the broader ReArm Europe Plan introduced by the Commission in March 2025. The Plan aims to unlock €800 billion in defence-related investments. The other ReArm pillars include the flexible application of fiscal rules to ease national defence investments, reprogramming cohesion policy funds to enhance the defence dimension, and providing EIB support through the mobilization of private capital to fund strategic defence projects, as well as direct financing.

In the specific case of SAFE, the Commission has proposed, and member states accepted, a €150 billion defence fund instrument in the form of loans to Member States for the joint procurement of defence capabilities. The loans are conditioned on collaborative procurement, which is meant to encourage joint projects, cost savings, and increased interoperability. The SAFE instrument focuses on strengthening the European Defence Technological and Industrial Base (EDTIB) by boosting production capacity in critical areas such as missiles, artillery, drones, cyber-defence, military mobility, and enhancing EU-wide defence readiness (Council of the European Union 2025). SAFE also aims to support deliveries to Ukraine (for those member states that do not wish to add to their own stockpiles, preferring to support Kiev instead) and reduce defence market fragmentation by providing clear incentives for Member States to work together, rather than competing or relying on non-EU suppliers, such as the United States.

SAFE is grounded in Article 122 of the Treaty on the Functioning of the EU, which allows for emergency financial instruments in extraordinary situations. It draws inspiration from past tools like SURE (which funded employment support during the COVID-19 pandemic), providing a temporary but powerful mechanism to unlock EU-wide support and demonstrating that the Union can make creative use of existing instruments under crisis conditions. The regulation sets a three-stage process for participation: first, member states express interest (within 2 months of SAFE entering into force); then a tentative loan allocation is made by the Commission; finally, each interested member state submits a detailed investment plan.

SAFE reduces EU reliance on non-EU suppliers by ramping up European defence industrial capabilities, and enables the kind of fast-track joint procurement initiatives that had been sorely lacking in Europe for several decades.

Overall, then, SAFE comes with a number of important advantages that member states should be able to leverage: It reduces EU reliance on non-EU suppliers by ramping up European defence industrial capabilities, and enables the kind of fast-track joint procurement initiatives that had been sorely lacking in Europe for several decades, despite the Union having long aspired to enhancing its military and political role. In addition, European states, through structured collaboration, can now avoid duplication and reduce the fragmentation of the defence market that many have been complaining about for years. Furthermore, SAFE enables Europe's continued support of Kiev, not least by treating Ukraine as an EU member state for SAFE purposes at a time when Russia's advances on the ground are making the outcome of the war all the more difficult to predict. On the financial side, €150 billion in loans will drive large-scale public defence spending and investment, likely resulting in new industrial contracts, factory expansions, and jobs in key defence sectors, potentially boosting the European economy. The provision allowing member states to use SAFE loans in a fiscally flexible manner under the Stability and Growth Pact also provides them with some much-needed breathing space to invest without breaching EU budget rules. To date, 16 member states have activated the national escape clause allowing them to boost military expenditure by an additional 1.5% of annual GDP over the next four years without being found in violation of the Union's fiscal rules (Moller-Nielsen 2025).

SAFE and Turkey: can they go together?

How does Turkey and its burgeoning defence industry fit into the SAFE framework, if at all? The Commission Regulation makes clear that, to qualify for SAFE loans, a minimum 65 percent of the value of the weapon system being acquired must be made in an EU member state, Ukraine, or European Economic Area (EEA)/European Free Trade Association (EFTA) country. Other states can take part subject to eligibility conditions. Specifically, Article 16.8 foresees the possibility of third-country participation up to 35%, but excludes components from states which pose a risk to the EU's security and defence interests. While non-EU countries can take part in joint procurements, it is noteworthy that they are not eligible to receive the loans (Tidey 2025). Turkish defence companies are keen to ensure they will not be excluded from the sort of large contracts SAFE is likely to lead to, but their participation remains uncertain. In August 2025, the European Commission noted that Turkish firms are currently barred from SAFE procurement, since Turkey has not yet signed an international agreement under Article 218 TFEU that ensures there will be no conflict with the EU's common foreign and security policy (European Parliament 2025).

Opportunities offered by Turkey's Participation

Although Turkey is not an EU member state, its existing partnership with NATO provides a foundation for potential collaboration within SAFE. Ankara's ability to adapt and innovate within collective frameworks highlights its readiness to contribute. By leveraging its history with NATO, Turkey is seeking to reinforce its credentials as a reliable and capable partner for SAFE, fostering mutual benefits in technological and strategic domains.

Turkey's active participation in NATO projects provides valuable lessons for its potential involvement in SAFE. As discussed above, NATO has benefited from Turkish contributions in cybersecurity and unmanned systems. Turkey has already engaged in successful joint ventures with European defence companies, too, and these partnerships demonstrate the feasibility of technological integration, while underscoring the mutual benefits of collaboration. Turkish defence products, and in particular its drones and missile systems, are globally recognized for their cost-effectiveness, innovation, and operational success.

Moreover, Turkey's existing expertise in drone technology could complement the EU's efforts to enhance its autonomous defence capabilities. SAFE offers financial incentives to nations participating in joint projects and research. Turkey's inclusion could bring significant funding opportunities, enabling it to scale innovation projects. By engaging with SAFE, Turkey has the potential to strengthen its ties with Europe. Cooperation could also both sides to address shared challenges, such as terrorism and cyber security. SAFE could also open European markets to Turkish defence products.

Challenges posed by Turkey's Participation

Turkey's involvement with SAFE is not merely an issue of defence technology or cooperation potential; it is also undeniably affected by longstanding political tensions with the EU and several of its member states.

Turkey's involvement with SAFE is not merely an issue of defence technology or cooperation potential; it is also undeniably affected by longstanding political tensions with the EU and several of its member states. These tensions stem from a myriad of issues, including territorial disputes with Greece, the continued impasse over Cyprus, Turkey's purchase of the S-400 Russian missile system, as well as growing concerns over autocratization on Turkey's domestic political front. Historically, Turkey's assertive and, on occasions, aggressive stance on issues such as maritime boundaries and energy exploration in contested waters has fuelled disputes with EU member states like Greece and Cyprus, leading to heightened diplomatic friction. Migration management remains another contentious area, with Turkey often leveraging its role as a transit country for migrants heading to Europe in negotiations with the EU, not least through the EU-Turkey deal of 2015-2016. Meanwhile, critiques of Turkey's handling of human rights and political and media freedoms further strain relations, casting doubt on its alignment with EU values and willingness to abide by EU standards. Finally, some EU member states perceive Turkey's involvement in SAFE as a threat to Europe's strategic autonomy, given its democratic backsliding and attempt to balance its relations with Russia, despite the latter's ongoing aggression in Ukraine.

These tensions are no transient obstacles; they are deeply entrenched legal and political challenges. Turkey's growing strategic autonomy, as evidenced by its independent foreign policy decisions and defence capabilities, clash with the EU's goal of maintaining unified regional governance and a rules-based approach anchored in international legal practice. Furthermore, the SAFE Regulation could exacerbate these divides, as Turkey's integration might be perceived by certain

EU member states as encroaching upon Europe's strategic autonomy and contradicting the message that Europe wishes to send to the world by adopting SAFE.

Given these factors and historical precedents, political tensions between Turkey and the EU are likely to persist. The SAFE Regulation, while offering opportunities for cooperation, will require sustained diplomatic efforts to address the underlying mistrust and conflicting priorities that have long defined the relationship between the two sides, but also substantial material change in Turkish foreign policy in the direction of greater alignment with the EU *acquis*. Turkey's strained relations with the EU, including concerns relating to Turkey's commitment to democratic governance, present significant barriers to SAFE participation.

Recommendations to the EU

Turkey's involvement with SAFE comes with an important set of challenges that would need to be overcome prior to its participation. To effectively integrate Turkey into the SAFE framework, the European Union must take proactive steps that prioritize inclusivity, strategic collaboration, and mutual growth.

Turkey's SAFE participation should remain conditional on Ankara improving its bilateral political relations with member states, and on Turkey making explicit assurances as to the inviolability of the sovereignty and territorial integrity of all EU member states.

First off, the EU should intensify its political dialogue with Turkey to rebuild trust and address long-standing geopolitical tensions. Turkey's SAFE participation should remain conditional on Ankara improving its bilateral political relations with member states, and on Turkey making explicit assurances as to the inviolability of the sovereignty and territorial integrity of all EU member states. This should build on the positive momentum Ankara has brought to Turkey-Greece relations over the last couple of years. If Ankara is serious about a long-term structural improvement in relations with its EU neighbour, implementing the Greek PM's proposal that the Turkish Parliament revoke its 1995 "casus belli" declaration towards Greece (which stated that Athens extending its territorial waters beyond 6 nautical miles in the Aegean would constitute a cause for war) would be a symbolic, yet powerful, declaration of Turkey's intentions. Moreover, EU conditionality could be operationalized too, with Brussels reassuring member states as to Ankara's intentions, but also nudging Turkey towards peaceful and harmonious cooperation with every EU member state by declaring that its political and military capacities guarantee the inviolability of EU borders. Establishing dedicated forums for defence and security collaboration, coupled with high-level diplomatic engagement, can create an atmosphere of mutual respect and shared objectives, but also make it clear to Turkey that its participation in SAFE hinges on its policy behaviour.

By framing Turkey's inclusion in SAFE as a means to bolster Europe's collective strength, the EU can align member states' perspectives with a unified vision for strategic autonomy and ensure that Turkey's participation genuinely adds value to EU endeavours.

Second, the EU could support Turkey in aligning its defence technologies with EU standards through co-funded research initiatives and technical workshops. Turkey's defence systems may need modifications to meet EU standards, which could involve substantial investment and time. Joint investments in testing facilities and innovation hubs can accelerate integration and ensure interoperability within the SAFE framework. Moreover, Turkey's participation would depend on compliance with EU regulations, intellectual property norms, and export controls. These are issues the EU and Turkey have discussed over the years, but without a successful resolution being achieved as yet. Navigating these legal complexities is a prerequisite for successful integration. In this context, the EU must emphasize shared objectives such as regional stability, technological innovation, and resilience against security threats. By framing Turkey's inclusion in SAFE as a means to bolster Europe's collective strength, the EU can align member states' perspectives with a unified vision for strategic autonomy and ensure that Turkey's participation genuinely adds value to EU endeavours in the field of defence.

Conclusion

Turkey's defence industry is at a pivotal moment in its evolution, and stands poised to leverage its considerable expertise. While challenges such as political tensions and the alignment of technical standards continue to complicate EU-Turkey relations, they should not be viewed as insurmountable barriers. Turkey has demonstrated its capacity to participate in international defence initiatives with its contributions to NATO projects and joint ventures with European companies, while continuing to push for more defence autonomy through the development of a wide industrial base. At the same time, there is little doubt that Turkey's foreign policy is often misaligned with EU priorities, and Turkish foreign policy priorities are

increasingly at odds with the Union's Common Foreign and Security Policy (CFSP), especially on Russia but also with respect to Turkey's stance on Hamas and its interventionist role in the Middle East (European Commission 2023). Turkey's purchase of the Russian S-400 missile system in 2017, and Ankara's refusal to recognize Cyprus, despite Turkey being an EU candidate country, continue to complicate its relations with Brussels, as do flare-ups in tensions with Greece and open policy disagreements with EU foreign policy priorities on a number of other issues.

This policy paper has argued that leveraging EU conditionality can allow Brussels to not only assuage some of its member states' concerns about Ankara's intentions, but also to re-engage with Ankara from a position of principles and values, rather than engaging with it purely on the basis of instrumentality and expediency. In other words, the value-oriented and practical aspects of SAFE can come together in a way that proves beneficial to the Union as a whole, while calming the fears of some of its member states regarding the role Turkey could play in the context of this initiative.

Turkey stands to gain in terms of both technological advancement and financial investment, not to mention the diplomatic overtures that such participation will allow, especially to member states that Ankara is close to, such as Hungary, Italy and Spain.

For Turkey, there is little doubt that SAFE participation would be another step towards consolidating an important position in the regional geopolitical landscape. Turkey stands to gain in terms of both technological advancement and financial investment, not to mention the diplomatic overtures that such participation will allow, especially to member states that Ankara is close to, such as Hungary, Italy and Spain. Moreover, its collaboration with SAFE would constitute an opportunity to contribute meaningfully to Europe's autonomy and stability, shaping a future where security challenges are met with collective strength and innovation instead of threats and regional antagonism. This is a future that would vindicate the setting up of SAFE, and prove that lessons from the war of Russia against Ukraine have been widely learned.

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Indispensable Enemies: The Shifting Dynamics of Israeli–Turkish Relations

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This study explores the dynamics of Israeli-Turkish relations amidst two pivotal conflicts: the war in Gaza, where Turkey has vocally supported the Palestinian side, and the Syrian crisis, where both countries maintain significant territorial and strategic stakes. While Turkey and Israel operate from distinct ideological and strategic positions, their interactions are neither those of allies nor outright adversaries, but rather of two regional powers navigating overlapping challenges. The analysis highlights how these conflicts reveal a duality in their relationship characterized by ideological divergence in Gaza and pragmatic considerations in Syria, offering insights into their complex coexistence within the rapidly shifting Middle Eastern landscape.

- Turkey was among the first Muslim-majority countries to recognize Israel in 1949, establishing early diplomatic ties grounded in Turkey's pro-Western orientation and NATO ambitions.
- The rise of the AKP and Recep Tayyip Erdoğan in the 2000s gradually transformed Turkish foreign policy, emphasizing solidarity with the Muslim world and a more vocal defence of the Palestinian cause.
- Divergences over Gaza, Syria, and energy politics in the Eastern Mediterranean further strained relations, while shared economic interests and US mediation prevented a complete breakdown.
- The 2023-2025 Gaza war became a defining moment, with Turkey's strong condemnation of Israel paired with pragmatic economic continuity and, later, participation in the peace process.
- For the first time, many Israelis and Turks saw Turkey and Israel respectively as one of their country's key security threats.
- The likelihood of direct conflict between Israel and Turkey has substantially decreased, as both states prioritize stability, reconstruction, and regional influence over open rivalry.
- While ideological and rhetorical tensions persist, Israeli-Turkish relations are entering a new phase characterized by pragmatic coexistence, mutual recognition, and shared regional responsibilities.

Introduction

Turkey was one of the first Muslim-majority states to formally recognize Israel, in 1949, establishing diplomatic ties just a year after Israel's foundation. This recognition stemmed from Turkey's desire to align more closely with Western powers as it sought NATO membership and a place in the broader Western alliance, ultimately joining NATO in 1952. Turkey's relationship with Israel remained steady during the early Cold War decades, supported by shared strategic interests in the Middle East. However, Turkey made sure that its relationship with Israel would not ruin its ties with the Arab world.

During the various Arab-Israeli conflicts, Turkey maintained a policy of neutrality to avoid alienating either side. In the 1956 Suez Crisis, Turkey refrained from openly supporting Israel, the United Kingdom, or France in their military operation against Egypt. This approach reflected Turkey's alignment with NATO, yet it also aimed to avoid direct involvement that could jeopardize crucial relations with Arab states. During the 1967 Six-Day War, Turkey again adopted a non-interventionist stance, preserving diplomatic ties with Israel without openly endorsing its actions. The 1973 *Yom Kippur* War heightened pressure on Turkey to align with its Arab neighbours, especially as anti-American and anti-Western rhetoric was on the rise in Turkey, and targeted Israel's supporters. In response, Turkey reduced its diplomatic mission in Tel Aviv, a gesture meant to appease Arab states without severing ties with Israel. Throughout these conflicts, Turkey's stance was shaped by a need to balance its Western and NATO alignment with regional considerations.^[1] The 1970s and 1980s were marked by further fluctuations as Turkey recalibrated its regional stance, especially amidst growing Muslim solidarity on Palestinian self-determination and the rising influence of Turkish political Islam. Economic and commercial relations, however, continued to develop: Turkey exported textiles, food products, and raw materials to Israel, while Israel provided technological and agricultural innovations. This economic collaboration laid the foundation for a more robust partnership that would flourish in the 1990s.^[2]

The end of the Cold War opened new avenues for Israeli-Turkish collaboration; both states recognized the benefits of strengthening their alliance. The 1990s represented the high-water mark of Israeli-Turkish cooperation, which developed into a strategic partnership with military cooperation at its core. Joint air and naval exercises, intelligence sharing, and arms modernization programmes reflected a deep level of strategic alignment. Importantly, this deepening cooperation benefited from the regional environment of the Oslo peace process: while Israel was engaged in negotiations with the Palestinians, its security cooperation with Turkey could develop without qualms or concerns.

Israeli-Turkish relations in the 1990s even survived the premiership of Necmettin Erbakan, Turkey's first Islamist politician to rise to that post. As leader of the Islamist Welfare Party, Erbakan promised to promote closer ties with Muslim states and criticized close relations with Israel as incompatible with Turkey's Islamic identity.^[3] As prime minister, however, he avoided anything that could harm bilateral relations. In February 1996, a military cooperation agreement was signed, marking a milestone that allowed for joint training exercises, intelligence sharing, and defence collaboration. The agreement bolstered the position of both Israel and Turkey as regional powers and cemented a strategic partnership that aligned them with US interests in the region. Economic ties also flourished, with Israeli and Turkish businesses forming partnerships across sectors including technology, tourism, agriculture, and trade. The signing of a bilateral free trade agreement^[4] meant that by the late 1990s, Turkey had become one of Israel's most important trade partners.^[5]

A Relationship in Flux

The rise of Recep Tayyip Erdoğan and the Justice and Development Party (AKP) to power in the 2000s gradually shifted the course of Turkish foreign policy towards closer alignment with the broader Muslim world. Erdoğan's growing emphasis on the Palestinian issue and criticism of Israeli policies, particularly regarding Gaza, diverged sharply from the cooperative approach of his own first term in government. The deterioration in relations after the 2008-2009 Gaza War reached a symbolic climax at the 2009 World Economic Forum in Davos, where Erdoğan confronted Israeli President Shimon Peres in the "One Minute incident". This marked a turning point in the public perception of bilateral relations, framing Turkey as a defender of the Palestinian cause. This trajectory culminated in the 2010 Mavi Marmara crisis, which brought relations to their lowest point in decades. Both episodes demonstrated Erdoğan's propensity to instrumentalize high-profile confrontations with Israel to galvanize domestic and regional audiences, while also pushing the relationship toward long-term estrangement.

As Turkey pursued a more assertive regional role in the 2010s, often challenging Western positions on issues like Palestine, Syria, and Libya, Israel moved closer to other regional players, including Greece and Cyprus.

As Turkey pursued a more assertive regional role in the 2010s, often challenging Western positions on issues like Palestine, Syria, and Libya, Israel moved closer to other regional players, including Greece and Cyprus. The discovery of natural gas reserves in the Eastern Mediterranean added further fuel to this realignment. Israel's prospective collaboration with Greece and Cyprus in energy exploration and transport provoked Turkey, which felt isolated and treated as a regional outsider, despite its geographical proximity and significant energy demands. But while energy dynamics in the Eastern Mediterranean have highlighted the strategic divergence between Israel and Turkey, they have also underscored the potential for future realignment. Natural gas reserves and energy transport corridors in the region could serve as both a source of tension and an opportunity for cooperation. However, the political rift between the two states, exacerbated by disputes over maritime boundaries and Turkey's exclusion from the EastMed Gas Forum, has stalled any meaningful collaboration.

Within this dynamic, the Kurdish question has emerged as a persistent source of mistrust. Israel's growing ties with Kurdish groups across the Middle East, and especially in Iraq, were perceived in Ankara as a potential tool to challenge Turkey's security interests. This perception reinforced Turkish suspicions that Israel could use Kurdish aspirations as leverage in times of political tension. The United States has added yet another layer to this equation, acting as both a stabilizer and a complicating factor. Washington has historically encouraged Israeli-Turkish cooperation, particularly in the 1990s. However, divergences between Ankara and Washington—ranging from the Iraq War to US support for Kurdish forces in Syria—have strained the triangle, with Israel's close alignment with the United States amplifying Turkey's sense of marginalization. At the same time, both Israel and Turkey remain indispensable—if difficult—allies for Washington. The US role therefore remains pivotal in determining whether Israeli-Turkish relations evolve toward renewed cooperation or slip irreversibly into strategic competition.

The Palestinian Issue and the War in Gaza

The Palestinian issue has historically played a catalytic role in shaping the regional dynamics of the Middle East, influencing both bilateral and multilateral relations. Before the rise of Recep Tayyip Erdoğan and the Justice and Development Party (AKP) to power, Turkey's stance on the Palestinian issue was marked by cautious pragmatism.

The Palestinian issue has historically played a catalytic role in shaping the regional dynamics of the Middle East, influencing both bilateral and multilateral relations. Before the rise of Recep Tayyip Erdoğan and the Justice and

Development Party (AKP) to power, Turkey's stance on the Palestinian issue was marked by cautious pragmatism. During much of the Cold War, Turkey sought to balance its relations with Israel and the broader Arab world, reflecting its desire to maintain strategic neutrality in a polarized region. While Turkey recognized Israel in 1949 and maintained diplomatic ties, it also supported Palestinian self-determination as a fundamental principle. Turkish leaders often criticized Israeli actions in the Occupied Territories, particularly after the 1967 Six-Day War, but avoided overt confrontation to preserve bilateral relations. This delicate balancing act was further shaped by Turkey's alignment with Western powers through NATO, its growing trade relations with Israel, and its need to maintain good standing with the Arab states, which were significant trade and energy partners. While Turkey recognized the Palestinian state in 1988, by the 1990s, during what has been described as the "golden era" in Israeli-Turkish relations, Turkey's approach to the Palestinian issue remained measured, focusing on multilateral dialogue and development initiatives rather than direct ideological opposition to Israeli policies. Since Erdoğan's rise to power, the Palestinian cause has increasingly attracted Turkish attention; this has often been framed as part of its broader ambition to assert moral leadership in the Muslim world.

Erdoğan's rhetoric during the Gaza war reflected the complexity of Turkey-Israel relations. While publicly denouncing Israel, Turkey continued to foster its bilateral economic ties, reflecting a pragmatic approach.

The recent war in Gaza, triggered by Hamas' 7 October 2023 attack on Israel and followed by Israel's counter-attack, intensified the scrutiny of Israeli-Turkish relations. While taking an initially circumspect position, Erdoğan gradually shifted to powerfully condemning Israel's military actions, which he framed as disproportionate and accusing Israel of committing war crimes. This rhetoric was consistent with Turkey's historical position, but was amplified by Erdoğan's aspirations to position Turkey as a defender of Palestinian rights on the international stage. Erdoğan's rhetoric during the Gaza war reflected the complexity of Turkey-Israel relations. While publicly denouncing Israel, Turkey continued to foster its bilateral economic ties, reflecting a pragmatic approach. Reports of Turkish goods being shipped to Israel via Greece or Azerbaijan,^[6] despite an official trade ban, underscored that fully severing mutually beneficial economic relations was easier said than done.^[7]

The war in Gaza unfolded against the backdrop of significant geopolitical shifts in the Middle East. The normalization agreements between Israel and several Arab reshaped the region's diplomatic landscape and further marginalized the Palestinian issue. These developments presented both challenges and opportunities for Turkey. On the one hand, they isolated Turkey as it sought to position itself as a champion of the Palestinian cause. On the other, they created an opportunity for Turkey to reassert its influence by portraying itself as a mediator and advocate for Palestinian rights—a role that resonated with domestic and regional audiences.

The war in Gaza provided Erdoğan with an opportunity to recalibrate Turkey's stance, leveraging its criticism of Israel to galvanize domestic and regional support, while seeking to counterbalance the emerging strategic alignments in the Eastern Mediterranean. The conflict further strained Israeli-Turkish relations, which had already been marked by periodic diplomatic freezes in the years preceding the war. Turkey's decision to coincide with the—albeit discreet—maintenance of economic engagement, reflecting the multifaceted nature of their relationship and the mutual interests that continue to bind them in areas such as trade, tourism, and technology.^[8]

The Palestinian issue remains a persistent point of divergence, yet it also has potential as a platform for soft-power diplomacy.

The Palestinian issue remains a persistent point of divergence, yet it also has potential as a platform for soft-power diplomacy. In the broader context of a rapidly shifting Middle East, the trajectory of the Palestinian issue and the fallout from the war in Gaza will be pivotal in shaping the future of Israeli-Turkish relations. Whether these tensions can be mitigated through pragmatic diplomacy, or whether the ideological divide will deepen, remains an open and pressing question.

Israel and Turkey in the Aftermath of the War

As the guns fall silent in Gaza and a ceasefire takes hold after two years of devastation, Israel and Turkey find themselves facing a familiar yet profoundly altered landscape; both countries must navigate a new regional reality shaped by exhaustion, mistrust, and necessity.

The ceasefire agreement, brokered through intense negotiations involving the United States, Egypt, Qatar, and Turkey, marks a significant though fragile turning point. Israel has begun a partial withdrawal of its forces, while the release of hostages and prisoners is underway. For thousands of displaced Palestinians, this moment signals the beginning of an uncertain return to their devastated homes. Humanitarian access is being cautiously restored, and international actors—with Turkey among them—are seeking to ensure that aid can flow into the Gaza Strip and reconstruction begin without a renewed escalation being triggered.

President Erdoğan has confirmed that Turkey will take part in the international task force to be formed as part of the ceasefire deal, alongside contingents from Egypt, Qatar, and the United States.

Turkey's involvement in the mediation process has been significant. Ankara's participation in the US-backed agreement now extends beyond diplomacy: President Erdoğan has confirmed that Turkey will take part in the international task force to be formed as part of the ceasefire deal, alongside contingents from Egypt, Qatar, and the United States. The Turkish Defence Ministry announced on 10 October 2025 that, "with their extensive experience in peacekeeping operations," its armed forces were ready to take on any assigned mission.^[9]

During the two-year war, Turkey escalated its measures against Israel, recalling its ambassador, suspending bilateral trade, restricting airspace access, and leading international criticism of Israeli operations. These moves resonated deeply with Turkish public opinion, strained economic ties, and tested Ankara's ability to balance moral rhetoric with strategic pragmatism. Now, as the ceasefire takes effect, Turkey's new role in the task force reflects an attempt to translate political capital into concrete influence that Ankara can be both principled and indispensable.

For Israel, the post-war challenge lies in transforming battlefield outcomes into lasting security. The war, initially triggered by Hamas's attacks, has left Israeli society weary and politically divided. More than a thousand Israelis were killed in the initial assault, while the subsequent military campaign in Gaza resulted in tens of thousands of Palestinian deaths and the near-total devastation of the Strip. Entire neighbourhoods have been erased, infrastructure shattered, and hundreds of thousands displaced—many with nowhere to return to. The "day after" brings neither triumph nor stability, but rather a complex mix of humanitarian responsibilities, diplomatic recalibration, and domestic reckoning.

If Ankara's participation in the task force proceeds smoothly, it could set a precedent for Turkish involvement in humanitarian and reconstruction missions without marking the full normalization of its diplomatic relations with Israel.

Working indirectly with Turkey through a US-brokered mechanism may prove uncomfortable for Israeli policymakers—yet it could also open limited channels of technical cooperation, even amid political estrangement. In parallel, Gaza's reconstruction looms as the most immediate and contentious test. Turkey, which previously funded key infrastructure in the enclave, including the Turkish-Palestinian Friendship Hospital, is likely to seek a prominent role in rebuilding efforts. Israel, wary of foreign political influence, may prefer such contributions to occur under international coordination. If Ankara's participation in the task force proceeds smoothly, it could set a precedent for Turkish involvement in humanitarian and reconstruction missions without marking the full normalization of its diplomatic relations with Israel.

Still, old sources of friction persist. In Syria, Israeli and Turkish interests continue to diverge sharply, with Israel targeting Iranian networks and Turkey confronting Kurdish forces and trying to balance Russian and Iranian influence. Both countries remain active in overlapping, volatile theatres where a miscalculation could reignite confrontation. This has led many experts and a sizeable part of the public opinion in both countries to view each other as one of their country's key security threats. Still, a further remains the least likely scenario.

Internationally, Turkey is likely to continue advocating for Israel to be held account for its wartime conduct, while Israel defends its actions as legitimate self-defence. These competing narratives—humanitarian moralism versus security necessity—will shape both nations' diplomacy in the months to come.

The role of US policy in the Middle East must also be taken into account in any projections on the future of Israeli-Turkish relations. The fundamental reconfiguration of regional and global politics that the Gaza war has brought about will be strongly nuanced by the degree of US commitment to the Middle East.

Domestic politics is also going to weigh heavily on the future. While the Palestinian problem was used to serve domestic political goals in Turkey and , the two-year Gaza war also gave the Israeli government and Prime Minister Netanyahu the opportunity to paper over domestic failures and silence dissent by declaring a security crisis, forcing all Israeli citizens to rally around their government and deeply polarizing and fragmenting Israeli society in the process.

Ultimately, the “day after” for Gaza is not yet peace; it is a transitional moment, fragile and contested, where political manoeuvring replaces open warfare^[10]. For Israel, it is a test of restraint and restoring diplomatic ties; for Turkey, it provides an opportunity to convert words into a tangible regional presence. Whether participation in the international task force becomes a platform for cautious engagement, or another point of friction, will depend on how both sides manage this uneasy coexistence.

Conclusion

Israel and Turkey stand at a crossroads: no longer outright enemies, they are still far from partners. What unfolds now will determine whether this ceasefire becomes a bridge to stability, or merely the pause between two storms.

The fact that the peace agreement in Gaza became possible thanks to the decisive intervention of US President Donald Trump adds a crucial dimension to the debates over the future of Israeli-Turkish relations.

President Trump has claimed a special relationship with both President Erdoğan and Prime Minister Netanyahu, and will probably use both to promote his vision on the Middle East. It would be difficult for either of the two leaders to go against US policy in Gaza and the Middle East as a whole. While Israel’s ability to influence US foreign policy in the Middle East remains substantially larger than Turkey’s, the degree and depth of President Trump’s involvement in the Palestinian problem will likely be influenced by the course of his relations with Gulf states such as Saudi Arabia, the United Arab Emirates, and Qatar. In that respect, Turkey’s role in the reconstruction process will be influenced by the degree of involvement of these states and Egypt.

In the aftermath of the war, Turkey’s active participation in the peace process creates the prospect of greater closeness after a period of intense hostility—at the level of rhetoric and public political discourse, at least. This new phase holds the potential to replace confrontation with cooperation, laying the groundwork for a more stable and pragmatic relationship between the two states.

Ultimately, the trajectory of Israeli-Turkish relations after the Gaza war will depend on the ability of both states to transform pragmatic cooperation into sustained diplomatic engagement. Both countries now face a rare opportunity to move beyond decades of mistrust and redefine their regional roles not through rivalry, but through dialogue and mutual recognition. If managed wisely, Turkey’s involvement in the peace process can serve as a foundation for long-term stability, while Israel’s openness to collaboration may help consolidate a broader environment of peace in the Eastern Mediterranean.

The rhetoric of enmity may be maintained for domestic purposes, but beneath it lies an emerging understanding that coexistence, rather than confrontation, is the only viable path forward. In this sense, the end of the Gaza war could mark not merely the cessation of hostilities, but the beginning of a gradual, enduring reconciliation between two pivotal powers in the Middle East.

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Contesting Hegemony: Opposition Strategies and Structural Constraints in AKP-Era Turkey

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- The AKP-MHP alliance has built a form of hegemonic authoritarianism that is not based on repression alone. It combines control over state institutions (judiciary, bureaucracy, security apparatus, media) with deep alignments to conservative-nationalist social bases and newly-enriched economic groups, creating a durable state-society block.
- The Kurdish question is simultaneously indispensable and explosive for the opposition. Without Kurdish electoral and discursive support, a change in power is nearly impossible; yet open cooperation with Kurdish parties risks alienating nationalist voters, especially those in and around the İYİ Party, and is easily framed by the government as “terror collaboration” under the “Terror-free Turkey” and security narrative.
- The economy has shifted from being the AKP’s core asset to its main liability, but this has not automatically translated into opposition advantage. High inflation, collapsing real wages and middle-class erosion are undermining the regime’s social contract, yet clientelist networks, selective social assistance and media control still prevent economic discontent from consolidating into a stable opposition majority.
- The CHP and the İYİ Party suffer from persistent leadership, cadre, and programmatic weaknesses that prevent them from converting regime vulnerabilities into a credible alternative. Although Ekrem İmamoğlu is arguably the opposition’s most charismatic and electorally competitive figure, his imprisonment has removed him from the national stage at a critical moment, creating a profound leadership vacuum. Özgür Özel, despite his constructive political style and rising public recognition, has not yet reached Erdoğan’s level of charismatic authority or nationwide resonance. Mansur Yavaş, meanwhile, remains an ambivalent national actor: his popularity is undeniable, but his reluctance to openly seek national leadership prevents him from anchoring a coherent opposition strategy. At the same time, neither the CHP nor the İYİ Party has consistently cultivated young, technocratic, socially-diverse elites or articulated clear, persuasive positions on foundational issues - including the economy, foreign policy, and especially the Kurdish question. As a result, the opposition remains structurally fragmented and strategically incoherent, unable to project itself as a confident and united governing alternative.
- In the short term, electoral breakthroughs remain possible, but structural transformation is hard without a bolder, inclusive democratic project. Lasting change would require moving beyond purely tactical electoral alliances towards a programme that tackles institutional reconstruction; seeks to bolster the rule of law, transparency and centre-periphery relations; and reframes the Kurdish question within an inclusive, citizenship-based vision - points the opposition has so far struggled to articulate.

Introduction

Over the past two decades, Turkey has moved from being treated as a difficult but promising candidate for democratic consolidation to being widely described as a paradigmatic case of “competitive” or “hegemonic” authoritarianism (Esen and Gümüşçü 2016; Özbudun 2015; Baser and Oztürk 2017; Akkoyunlu and Oktem 2018). The Justice and Development Party (*Adalet ve Kalkınma Partisi*, AKP), in power since 2002, has gradually transformed the institutional and normative foundations of the Turkish political system. What began as a reformist and pro-European conservative party evolved into a dominant actor presiding over a highly-centralised presidential regime, tightly-controlled media, politicised bureaucracy and dense networks of neo-patrimonial distribution. Especially since the 2013 Gezi protests, the 2015-16 conflict cycle in the southeast, and the failed coup attempt of July 2016, the AKP - in alliance with the Nationalist Action Party (*Milliyetçi Hareket Partisi*-MHP) - has consolidated a new political order in which electoral competition persists but takes place on a profoundly uneven playing field.

At the same time, this transformation has profoundly constrained the space in which the opposition can operate. Parties, movements and individual politicians critical of the AKP-MHP bloc face continuous legal and administrative pressure: criminal investigations, prosecutions on terrorism-related charges, [the removal and detention of elected mayors](#), bans on political activity, and the routine targeting of journalists and activists have become part of the repertoire of governance. When opposition actors attempt to replicate instruments long monopolised by the ruling coalition - for example, building dense local patronage networks, mobilising through religious or neighbourhood associations, or articulating alternative security discourses - they often encounter swift repression and delegitimation by state institutions aligned with the executive. In this sense, the opposition is expected to compete under rules that are neither clear nor consistently enforced, in a context where the “referee” is also a player. Yet the difficulty of the environment does not fully absolve opposition parties of responsibility. Their chronic fragmentation, recurrent leadership crises, inadequate intra-party democratisation, and frequent reliance on short-term electoral bargains rather than long-term programmatic renewal all contribute to their limited capacity to convert regime vulnerabilities into a credible governing alternative.

The ruling bloc also benefits from significant structural advantages inside the state apparatus and from enduring support among important social constituencies.

Under the given realities, this policy paper examines the dilemmas, opportunities and weaknesses of the Turkish opposition under conditions of hegemonic authoritarianism. It proceeds from two core assumptions: First, that the resilience of AKP-MHP rule cannot be understood solely through reference to coercion, clientelism or institutional manipulation. The ruling bloc also benefits from significant structural advantages inside the state apparatus and from enduring support among important social constituencies. The opposition, in other words, is confronted not only by an authoritarian incumbent but also by an entrenched societal and bureaucratic alignment that makes alternation in power exceedingly difficult. But second, that these structural advantages coexist with growing vulnerabilities: a deteriorating economic record, deepening social inequalities, the erosion of public services and mounting dissatisfaction with the quality of governance. These failures potentially create openings for opposition parties, but only if they can respond with credible leadership, programmatic clarity and organisational capacity.

The paper focuses on the two principal opposition forces: the Republican People's Party (Cumhuriyet Halk Partisi, CHP) and the Good Party/İYİ Party (İYİ Parti). Although İYİ Parti does not command a very large share of the vote, it plays a significant role by maintaining its own parliamentary group and, particularly during election periods, demonstrating an ability to aggregate and represent segments of the nationalist electorate under its organisational umbrella. This analytical choice is not meant to downplay the importance of other actors - most notably the pro-Kurdish left mobilised around the Peoples' Equality and Democracy Party (*Halkların Eşitlik ve Demokrasi Partisi*, DEM), as well as smaller conservative or centre-right formations - but reflects the specific objective of assessing the capacity to generate a credible, nationwide alternative governing bloc under conditions of hegemonic authoritarianism. In particular, the recent "[Terror-Free Turkey](#)" (*Terörsüz Türkiye*) discourse, and the accompanying securitisation of Kurdish politics, have further constrained DEM's room to operate as a "classic" opposition party, pushing it towards a more defensive, survival-oriented stance and heightening its distance from the institutional core of the opposition camp. By contrast, in electoral and institutional terms, the CHP and the İYİ Parti now constitute the core of a 'systemic' opposition: they are represented across the country, they lead or co-lead key municipal administrations (most prominently in Istanbul and Ankara), and they have been the primary architects and public faces of broad opposition alliances such as the [Nation Alliance and the "Table of Six"](#). As parties whose organisational structures, ideological profiles and leadership cadres are oriented towards capturing the executive at the national level, they occupy a structurally different position from actors whose strategic horizon is more explicitly movement-, identity- or region-based.

In this landscape, it is also important to note the position of the Kurdish political movement, where [Selahattin Demirtaş](#) has long stood out as the most resonant opposition figure. Among younger generations, progressive circles, and segments of the broader democratic public, Demirtaş enjoys a level of moral authority and popular appeal far exceeding that of Abdullah Öcalan in the contemporary moment. However, a combination of structural constraints has prevented Demirtaş from functioning as a fully active pole of attraction within the opposition field. His ongoing imprisonment since 2016, coupled with an environment shaped by the opaque bargaining dynamics surrounding the "Terror-Free Turkey" process, has significantly limited his ability to articulate an alternative political vision or to participate directly in coalition-building efforts. As a result, despite his symbolic centrality and potential to broaden the opposition's social reach, the Kurdish movement's most charismatic political figure has been relegated to a constrained, mediated form of influence - further complicating the prospects for constructing a cohesive, cross-cleavage opposition bloc capable of challenging hegemonic authoritarian rule.

The CHP remains the only opposition party with a realistic claim to forming a government on its own or leading a broad coalition, whereas the İYİ Parti - despite having no viable prospect of winning national power independently - retains significant influence through its ability to aggregate and mobilise nationalist constituencies.

The CHP and İYİ Parti are the opposition actors most directly interpellated by domestic audiences as potential "governments-in-waiting", though they do not occupy identical positions within the opposition field. The CHP remains the only opposition party with a realistic claim to forming a government on its own or leading a broad coalition, whereas the İYİ Parti - despite having no viable prospect of winning national power independently - retains significant influence through its ability to aggregate and mobilise nationalist constituencies. Its parliamentary group, organisational reach among segments of the centre-right, and capacity to shape nationalist sensitivities within opposition blocs make it an important, agenda-setting actor even without the numerical strength to contend for executive office alone.

The İYİ Party's roots in MHP tradition and its long-standing ties to the security bureaucracy mean that, in an eventual alternation of power, it is widely perceived as more able - and in some respects more willing - to work with existing state cadres and within institutional reflexes. Its opposition is thus framed primarily against the current political duo of President Recep Tayyip Erdoğan and the leader of MHP, Devlet Bahçeli, rather than against the deeper continuities of the state apparatus. By contrast, the [CHP under Özgür Özel's leadership](#), and with figures such as [Ekrem İmamoğlu](#) at its symbolic centre, is increasingly signalling an ambition to reconfigure state personnel and practices more substantially, especially at the mid- and upper-bureaucratic levels. This makes the CHP the core carrier of a more transformative opposition project. Both parties are nonetheless expected, unlike smaller or more specialised actors, to demonstrate governing competence across the full spectrum of policy domains: economic management, foreign and security policy, state administration, social policy and the rule of law. Their organisational choices (candidate selection, resource distribution, branch-building), leadership profiles (credibility, visibility, resilience), and programmatic (in)clarity on core issues such as the economy, the Kurdish question and Turkey's international alignment therefore carry disproportionate weight in shaping perceptions of whether a transfer of power is both possible and desirable.

By concentrating on the CHP and the İYİ Party, the paper can more precisely interrogate the distinct mechanisms through which opposition weakness and fragmentation are reproduced at the level of party organisation and strategy, while still situating these dynamics in relation to other opposition actors - above all, the HDP and its successors - whose inclusion in, or exclusion from, broader coalitions remains one of the central structural dilemmas facing any project of political change in contemporary Turkey.

AKP-MHP Hegemony: Structural Advantages at Home and Abroad

From a domestic perspective, the ruling coalition now enjoys three interlocking sets of advantages: control of key levers of the state and bureaucracy; deep embeddedness in conservative, religious and nationalist constituencies; and an ability to construct and sustain existential security narratives around both domestic dissent and regional crises.

The endurance of AKP-MHP rule rests on a complex combination of electoral strength (Aylan Musil 2024), institutional capture (Yesil 2018) and discursive hegemony (Gurpinar 2022), but it is also shaped by the evolving interests of the two partners. Historically, the AKP and MHP emerged from different ideological and sociological traditions; yet over time, the AKP's drive to remain in power and its progressive "statistisation" (*devletleşme*) (Yavuz 2020) have dovetailed with the MHP's long-standing aspiration to anchor itself within the core state apparatus and security bureaucracy (Yavuz 2002). The result is not so much a principled ideological convergence as a largely interest-driven pact over control of the state and its coercive and administrative capacities. From a domestic perspective, the ruling coalition now enjoys three interlocking sets of advantages: control of key levers of the state and bureaucracy; deep embeddedness in conservative, religious and nationalist constituencies; and an ability to construct and sustain existential security narratives around both domestic dissent and regional crises. These narratives, articulated through the idioms of survival (*beka*) (Adisonmez and Al 2024) and national unity, help to legitimise the asymmetric distribution of power within the political system and to normalise the fusion of partisan and state interests that underpins the current governing bloc.

First, the AKP's long tenure has allowed it to remake the state apparatus while preserving a high degree of coalition flexibility for President Recep Tayyip Erdoğan. Successive constitutional and legal reforms - most notably in 2010 and 2017 - have concentrated decision-making in the presidency and expanded executive leverage over the judiciary, higher courts, regulatory agencies and the civil service. At the same time, the leadership has cultivated an informal, shifting majority that rests on a blend of material patronage (Oyvatt, Tekguc and Yagci 2025), shared conservative-nationalist worldviews and ad hoc bargains with different segments of the bureaucracy, business community and subnational elites. Key posts in the security sector, provincial administration and state-linked economic institutions are occupied not only by formal party loyalists, but by actors whose careers and protection depend on alignment with President Erdoğan's personal authority (Keskin 2020) and the continuity of the broader governing project. This produces a state structure that is simultaneously personalised and coalition-capable: the centre can reconfigure alliances within the conservative-nationalist and state elite spectrum without relinquishing control. For opposition forces, therefore, alternation in power would require more than an electoral victory; it would entail confronting an administrative and politico-economic ecosystem whose habits, expectations and incentive structures have been calibrated around Erdoğan's long incumbency and the informal coalitional architecture that sustains it.

Secondly, the AKP-MHP alliance continues to command strong support among diverse but overlapping social constituencies: segments of the conservative Sunni middle and lower-middle classes; parts of the business community

benefiting from public procurement, municipal contracts and politically-mediated credit; nationalist voters for whom territorial integrity and state strength trump procedural concerns; and dependent poor who are embedded in networks of social assistance and religious-communal solidarity (Ozdemir 2020). To this must be added a relatively new stratum that has emerged over the last two decades: upwardly mobile, often provincially-rooted groups with comparatively low formal educational attainments, whose social rise has been closely intertwined with AKP-era economic expansion, construction-led growth and access to state-linked opportunities. For these constituencies, regime continuity is not only an ideological preference; it is also a guarantee of status preservation and further mobility. The ruling coalition's capacity to articulate a narrative of "national will", religious authenticity and external besiegement allow it to speak simultaneously to these material interests and to long-standing symbolic grievances vis-à-vis secular, urban and "Westernised" elites (Bilgic 2018). Even during acute economic downturns and corruption scandals, such narratives help sustain loyalty or at least acquiescence among broad swathes of voters, particularly in Anatolian provinces, conservative metropolitan districts and newly-enriched peri-urban belts.

Thirdly, the AKP-MHP bloc has constructed a security discourse in which the boundary between "internal" and "external" threat is deliberately blurred and increasingly meaningless (Sandal and Ozturk 2023). Domestic opposition, Kurdish political demands, refugee politics, great-power competition and regional conflicts are woven into a single, composite narrative of siege and vulnerability. The post-2015 re-securitisation of the Kurdish question, the militarisation of Turkey's Syria and Iraq policies, and persistent references to "foreign plots" behind economic turbulence or protest episodes all contribute to a climate in which internal dissent is easily coded as an extension of external hostility (Ozturk 2021). In this framing, stability and a strong centralised executive are elevated as the highest public goods, while opposition calls for democratisation, power-sharing or reconciliation can be portrayed as naïve at best and subversive at worst. The effect is amplified by the government's near monopoly over mainstream television and much of the print media, and its growing capacity to shape digital spaces through regulation, surveillance and informal pressure. In such a mediated environment, security becomes a holistic register that fuses inside and outside, making it harder for opposition actors to articulate alternative visions without triggering fears of strategic vulnerability.

AKP rule has also benefited from international conditions that have reduced the costs of authoritarian consolidation.

From an external perspective, AKP rule has also benefited from international conditions that have reduced the costs of authoritarian consolidation. The European Union's internal crises and its preoccupation with migration management have weakened its willingness and capacity to exercise normative leverage over Ankara. The Syrian civil war and subsequent refugee flows have transformed Turkey into a pivotal partner for the EU, enabling the government to use the "migration card" as a bargaining chip in negotiations and to shield itself from harsher criticism (Gokalp Aras 2019). At the same time, the gradual move towards a more multi-polar international order - marked by the rise of China, the renewed assertiveness of Russia and the growing importance of Gulf capital - has allowed Ankara to diversify its foreign policy and economic dependencies. Access to alternative sources of finance, investment and diplomatic support reduces the regime's vulnerability to Western pressure and enables it to play external actors off against one another (Öniş and Kutlay 2017).

These domestic and international advantages combine to create a particular type of hegemonic authoritarianism: one that is anchored in a socially rooted, nationalist-conservative coalition, backed by a disciplined and loyal bureaucracy, and buffered by a regional and global environment that rewards security cooperation and transactional bargaining more than liberal democratic reform. For the opposition, this implies that the challenge is not limited to contesting elections under unfair conditions: it must also confront deeply embedded structures of power, identity and interest.

The Kurdish Question and the Limits of Opposition Coalitions

The result is a paradoxical moment in which a cautious opening by the governing bloc intersects with a fragmented and ambivalent opposition field; rather than capitalising on the new space, the opposition risks being caught off-balance, with its internal divergences on the Kurdish question and regional policy exposed precisely at a time when Kurdish electoral behaviour and regional realignments remain decisive for the future of Turkey's political order.

The Kurdish question occupies a central place in this configuration of power and constraint, but it has not always been inscribed in the same way in Turkey's political calculus. Historically, Kurdish votes have often held a pivotal, king-making position in tightly contested elections, forcing governments and opposition alike to think in terms of coalition geometries rather than simple bloc politics. The AKP's own trajectory on the Kurdish issue - from cautious cultural openings and the "solution process" of the 2010s to hard securitisation after 2015 - reflects the shifting interplay between electoral

incentives, coalition needs and regional conflict dynamics (Ozpek 2018). Since 2024, however, developments in Syria and a reconfiguration of US Middle East priorities under Trump's renewed regional vision have begun to alter the strategic landscape, creating pressures and opportunities for a partial recalibration. The AKP-MHP coalition has tentatively explored a more flexible line, seeking room for manoeuvre without formally abandoning its security-centred discourse. In this context, the CHP and IP have adopted distinct stances: especially under the emerging leadership profile of figures such as Özgür Özel and Mayor of Istanbul Ekrem İmamoğlu, the CHP has signalled a more rights-based, citizenship-oriented approach, whereas İYİ Party's MHP origins and closer affinity with traditional state-security reflexes have inclined it toward a more restrictive position. The result is a paradoxical moment in which a cautious opening by the governing bloc intersects with a fragmented and ambivalent opposition field; rather than capitalising on the new space, the opposition risks being caught off-balance, with its internal divergences on the Kurdish question and regional policy exposed precisely at a time when Kurdish electoral behaviour and regional realignments remain decisive for the future of Turkey's political order.

In its early years, the AKP pursued a strategy that combined limited cultural recognition with developmentalist promises in the predominantly Kurdish southeast. This approach, coupled with the party's distance from the secular-nationalist establishment, allowed it to attract significant Kurdish electoral support and to weaken the hold of traditional nationalist parties. The 2013-15 "[resolution process](#)", though opaque and ultimately unsuccessful, represented the most serious attempt in the history of the republic to address the armed dimension of the Kurdish question through negotiation. Yet the collapse of this process - amid mutual mistrust, regional spillovers from Syria and shifting electoral incentives - paved the way for a dramatic re-securitisation. The return to armed conflict in 2015, urban warfare in the southeast and the criminalisation of the HDP reconfigured the political landscape.

For the AKP-MHP bloc, the post-2015 environment brought clear and immediate advantages, but did so by pushing Turkish politics into an exceptionally securitised phase. The convergence of renewed PKK violence, the collapse of the peace process, the Syria war and the post-coup state of emergency allowed the government to weave together a broad "anti-terror" and "survival" narrative that reached far beyond its core electorate. This discourse resonated not only with different strands of Turkish nationalism, but also with security-oriented constituencies within the bureaucracy, the armed forces and parts of the urban middle classes. In practice, it blurred the line between armed militancy, legal Kurdish politics and wider dissent, placing Kurdish actors and other opposition forces under a shared umbrella of suspicion and pressure. At the same time, this high-intensity securitisation fractured potential opposition coalitions by hardening the cleavage between Kurdish-oriented parties and Turkish nationalist actors, making any durable Kurdish-Turkish opposition alignment both politically costly and easily stigmatised. Yet, as the [2019 municipal elections](#) showed, such alignment is a necessary (if fragile) condition for seriously challenging AKP-MHP dominance at the ballot box. The governing bloc's strategy has therefore been to pre-empt and delegitimise precisely this kind of cross-cleavage cooperation by reframing it as collaboration with terrorism, thereby locking Kurdish voters into a double bind and constraining other opposition parties' room for manoeuvre under an ever-present security shadow.

For the opposition, the Kurdish question thus presents a deep and enduring dilemma. On the one hand, without Kurdish support - both electoral and discursive - it is extremely difficult to assemble a coalition capable of winning national-level power.

For the opposition, the Kurdish question thus presents a deep and enduring dilemma. On the one hand, without Kurdish support - both electoral and discursive - it is extremely difficult to assemble a coalition capable of winning national-level power. On the other hand, overt cooperation with Kurdish parties risks alienating nationalist voters, particularly those inclined towards the İYİ Party or the CHP's more security-sensitive segments. This tension has repeatedly led opposition leaders to adopt deliberately ambiguous or evasive positions, whereby they seek to maximise tactical coordination with Kurdish actors (especially at the local level and in second-round presidential contests), while avoiding clear programmatic commitments on core Kurdish demands such as decentralisation, mother-tongue education, constitutional recognition or the release of political prisoners. In practice, this ambiguity has sharply limited the transformative potential of opposition coalitions. What might, under different conditions, look like a shared project of democratisation and conflict transformation is reduced to a narrowly-instrumental electoral arrangement which is permanently vulnerable to government wedge-driving, criminalisation campaigns and media-fuelled moral panics.

By 2025, this dilemma has hardened into something close to a "shirt of fire" for opposition actors. The collapse of the peace process, the institutionalisation of the post-2016 security regime and the near-total takeover of mainstream media mean that any move perceived as accommodating Kurdish demands can be instantly reframed as a security threat or a

betrayal of the “national survival struggle”. At the same time, Kurdish voters - having experienced both the promise and the violent unravelling of the peace process, as well as ongoing repression of their elected representatives - increasingly demand clarity rather than tactical silence from would-be partners in the Turkish opposition. This asymmetry of risk is striking: for CHP and İYİ Party elites, even limited gestures towards Kurdish inclusion carry high short-term reputational and electoral costs; for Kurdish actors and constituencies, continued exclusion or half-measures signal that their rights and security remain permanently negotiable. The result is a structurally unstable equilibrium in which all sides know that some form of Kurdish-Turkish opposition alignment is necessary to unsettle the AKP-MHP bloc, yet none can fully own such a strategy without incurring serious political danger.

In the broader Middle Eastern and international context, the Kurdish issue has further narrowed the opposition’s room for manoeuvre, while the most recent “terror-free Turkey” initiative has heightened this constraint rather than relaxing it.

In the broader Middle Eastern and international context, the Kurdish issue has further narrowed the opposition’s room for manoeuvre, while the most recent “terror-free Turkey” initiative has heightened this constraint rather than relaxing it. Western involvement with Kurdish forces in Syria and Iraq - justified in terms of counter-ISIS operations, stabilisation, and human rights protection - continues to feed the government’s master narrative that Kurdish political and territorial claims are embedded in a wider external project to weaken or partition Turkey. Against this backdrop, Ankara’s latest push to reframe domestic politics around the promise of a “Terörsüz Türkiye” does not only target the PKK; it seeks to redraw the regional and internal security architecture in ways that fuse counter-terrorism, border policy, and regime consolidation into a single strategic agenda.

In this new phase, the CHP has again struggled to position itself as a central, agenda-setting actor. It has offered selective critiques and procedural concerns, but it has not been able to articulate a clear, autonomous roadmap for how demilitarisation, rights, and national security could be reconciled within a post-conflict framework. The İYİ Party, shaped by its MHP origins and a strongly security-sensitive electorate, has remained largely outside the process, presenting itself as the guarantor of national unity rather than a stakeholder in any re-imagining of centre-periphery relations. As a result, the governing bloc effectively monopolises the design and language of the “terror-free Turkey” project, while the main opposition parties are reduced to reacting from the periphery.

This has direct implications for their credibility as potential governing forces. A process that aspires - at least at the level of rhetoric - to restructure the domestic order and Turkey’s regional posture inevitably raises foundational questions about citizenship, decentralisation, cross-border operations, and the future of armed non-state actors. By failing to shape that agenda, or by standing visibly outside it, both the CHP and the İYİ Party risk being perceived as either unwilling or unable to manage the country’s core security dilemmas. In a context where the government presents “terror-free Turkey” as the strategic key to a newly configured regional order, exclusion or self-exclusion from that process makes it harder for the opposition to convince both domestic and international audiences that they can assume executive responsibility without jeopardising stability. In short, the Kurdish question - now recoded through the language of a “terror-free” future - remains the opposition’s most critical and combustible fault line, and their distance from the current process structurally weakens their prospects of governing change.

AKP-MHP Governance Failures: Economy, Neo-Patrimonialism and Social Policy

The structural strengths of the AKP-MHP regime coexist with growing and increasingly visible governance failures. These failures are especially pronounced in the fields of macroeconomic management, social policy, institutional integrity and gender equality. From a policy-oriented perspective, they constitute potential sources of vulnerability for the ruling bloc and, conversely, potential reservoirs of legitimacy for an opposition capable of articulating credible alternatives.

First, by 2025, the economy has moved from being the AKP’s core source of legitimacy to its most visible strategic vulnerability.

First, by [2025, the economy](#) has moved from being the AKP’s core source of legitimacy to its most visible strategic vulnerability. In the party’s first decade in power, it could credibly claim ownership of a success story built on post-2001 reforms, EU-anchored expectations and a favourable global environment; growth was robust, inflation manageable, and large segments of society experienced upward mobility. From the mid-2010s onwards, however, this configuration unravelled. Politically-driven “low interest rate” experiments, the hollowing-out of central bank autonomy, and chronic high inflation eroded real incomes and destroyed the sense of predictability that underpinned the AKP’s earlier social contract.

Poverty and inequality indicators remain acute; the professional middle classes feel squeezed; and young, educated cohorts are experiencing a combination of stagnant wages, housing insecurity and declining expectations, often expressed in a desire to emigrate.

The policy turn after the 2023 elections - with the appointment of a more orthodox economic team and a shift towards fiscal and monetary tightening - has not reversed this damage so much as it has redistributed its costs (Akçay 2024). Stabilisation efforts have meant a spike in interest rates, rising tax pressures and de facto austerity for middle- and lower-income groups already exhausted by years of price instability. Poverty and inequality indicators remain acute; the professional middle classes feel squeezed; and young, educated cohorts are experiencing a combination of stagnant wages, housing insecurity and declining expectations, often expressed in a desire to emigrate. The government still deploys targeted social transfers, credit channels and public employment as instruments of political management, but these tools now operate in an environment where macroeconomic strain is visible in everyday life - rent, food, energy, education - and where the promise of shared future prosperity has lost much of its credibility.

In this 2025 setting, the economy no longer functions as an uncomplicated asset that can be traded for political loyalty. Rather, it is a field of permanent crisis management in which the regime must continuously balance the demands of international markets and creditors against the anger of a population living with devalued savings and compressed living standards. The AKP retains considerable capacity to distribute selective benefits and shield key constituencies, yet the structural malaise of high inflation, low trust in institutions and the erosion of the “success story” narrative has turned the economic sphere into a central fault line of regime stability rather than a pillar of its strength.

Secondly, the consolidation of a neo-patrimonial system of rule has further weakened state capacity and public trust (Bektas 2025). Public procurement, urban development and large-scale infrastructure projects have become key mechanisms for the redistribution of resources to politically-connected firms, creating a “crony capitalist” ecosystem in which economic and political power reinforce one another (Güven 2023). Regulatory agencies, oversight bodies and courts have been brought under tighter executive influence, hollowing out formal checks and balances. This has diminished transparency, fostered perceptions of pervasive corruption and undermined the meritocratic foundations of the civil service. From the perspective of citizens and investors alike, the predictability of rules has been replaced by personalised access and political discretion.

Thirdly, social policy domains such as education, health and gender equality have been deeply affected by ideological agendas and fiscal constraints. In education, rapid expansion in the number of universities and schools has not been matched by quality improvements. [Curriculum changes](#) and institutional appointments have reflected conservative-religious priorities, contributing to polarisation over the role of religion in public life and perceived declines in academic freedom. In the field of women's rights, Turkey's withdrawal from the Istanbul Convention and rising concerns about gender-based violence have been accompanied by discourses that re-emphasise traditional family roles and question international gender equality norms. These trends disproportionately affect women, youth and urban middle-class professionals - constituencies that might be inclined to support opposition parties, but whose grievances are not always channelled into coherent political projects.

From the vantage point of the opposition, these weaknesses of the incumbent regime ought to represent significant opportunities. Objective indicators and everyday experiences alike point to a declining quality of governance, shrinking economic prospects and growing social stratification. Yet the translation of these problems into sustained opposition support has been uneven and fragile. High levels of affective polarisation, partisan media consumption and clientelist ties limit the extent to which dissatisfaction with performance translates into willingness to vote for alternatives. Moreover, as the next section explores, the opposition's own organisational and programmatic deficits have often prevented it from capitalising fully on the ruling bloc's vulnerabilities.

Opposition Weaknesses: Leadership, Organisational Capacity and Programmatic Ambiguity

The main opposition parties, the CHP and the İYİ Party, face a hostile structural environment but also suffer from significant self-inflicted weaknesses. Three dimensions stand out: leadership and cadre formation; programmatic clarity and policy articulation; and internal cohesion.

In terms of leadership and cadre formation, the opposition has consistently struggled to produce figures who can rival President Erdoğan's incumbency advantages, personalised authority and symbolic capital.

In terms of leadership and cadre formation, the opposition has consistently struggled to produce figures who can rival President Erdoğan's incumbency advantages, personalised authority and symbolic capital. The 2023 presidential campaign crystallised this problem: Kemal Kılıçdaroğlu briefly became the focal point of anti-government expectations, yet he was ultimately unable to project a compelling leadership image beyond the core CHP electorate (Yavuz and Ozturk 2023). The post-Kılıçdaroğlu transition has not fundamentally altered this imbalance. Although Özgür Özel represents organisational renewal and a more dialogical style, he has so far not closed the gap with Erdoğan in terms of charisma, narrative dominance or perceived capacity to 'run the state'. Similarly, Ankara Metropolitan Mayor Mansur Yavaş, despite consistently ranking as one of the country's most popular political figures in public opinion surveys, does not project a charismatic leadership profile and remains an unknown quantity in high-stakes national politics. His strategic intentions at the presidential level are uncertain - not least because it is unclear whether his own party would nominate him - and even in the event of a candidacy, he could face legal and institutional pressures of the sort directed at Ekrem İmamoğlu. This combination of popularity without overt ambition, charisma or institutional protection further complicates the opposition's ability to consolidate a clear and credible leadership alternative

A similar limitation applies to the İYİ Party: under its new leader [Müşavir Dervişoğlu](#), the party retains organisational visibility and ideological coherence within nationalist and centre-right circles, yet it has not succeeded in cultivating a leadership profile capable of generating broad cross-class, cross-regional or cross-cleavage appeal. Dervişoğlu's political persona remains largely confined to the party's traditional nationalist base, lacking the symbolic capital, narrative versatility and policy breadth required to mobilise constituencies beyond this core. As a result, the İYİ Party continues to operate primarily as a niche actor within the opposition ecosystem - important for coalition arithmetic and nationalist signalling, but structurally limited in its ability to project itself as a plausible pillar of a nationwide governing alternative.

While episodic hopes have coalesced around particular personalities - most notably Ekrem İmamoğlu after the 2019 and 2024 municipal victories - these moments have repeatedly been blunted by legal pressures, intra-party competition and strategic hesitations over presidential candidacies and coalition design (Ozpek, Ozturk, Dagi and Erkoc 2025). The imprisonment, political banning or judicial harassment of key figures further narrows the pool of credible national contenders. At the same time, neither the CHP nor the İYİ Party has managed to systematically recruit, train and promote a new generation of technocratic and political cadres capable of governing complex state institutions in the event of a transition. Much of the upper and middle-level leadership still reflects the sociological profile and worldview of earlier secular-republican or traditional nationalist elites. This continuity limits the opposition's capacity to speak convincingly to conservative, religious or peripheral constituencies that are indispensable for constructing a durable majority, even as it tries to reposition itself through discourses of "[normalisation](#)" and institutional repair.

Programmatically, the opposition has repeatedly failed to project a clear and credible alternative on core policy domains, particularly the economy, foreign policy and the Kurdish question.

Programmatically, the opposition has repeatedly failed to project a clear and credible alternative on core policy domains, particularly the economy, foreign policy and the Kurdish question. Opinion surveys and qualitative studies suggest that many citizens are aware of existing problems - rising costs of living, declining quality of education, politicisation of the judiciary - but remain unconvinced that opposition parties possess either a coherent plan or the competence to address them effectively. Opposition economic platforms often oscillate between orthodox, market-friendly rhetoric and diffuse promises of social justice, without specifying institutional mechanisms, distributional trade-offs or coalition-building strategies that would make such programmes governable. The CHP's late-November 2025 programme revision, its first in thirteen years, illustrates this tension. The leadership presented the new economic vision as resting on four pillars - "effective and productive public administration, a fair macroeconomic stability framework, transformation in employment and production, and strategic sectoral structuring" - yet these categories remain largely generic, technocratic and weakly embedded in a broader political economy narrative that speaks to contemporary crises of precarity, climate transition and digital transformation. In foreign and security policy, the CHP and İYİ Party continue to criticise the government's personalised, militarised and transactional diplomacy, but they have struggled to articulate a positive, multi-polar vision of Turkey's international role that goes beyond delayed calls for a "return to the West" or abstract references to "balance" between great powers. The new CHP programme's emphasis on external "resilience" and security does little to resolve this, offering neither a detailed roadmap for relations with the EU and NATO nor a clear framework for handling regional conflicts and migration pressures. Finally, the way in which such programmes are drafted and communicated - often

through elite-driven commissions and episodic party conferences rather than sustained, participatory debate with party organisations and societal actors - further limits their persuasive power. The ruling bloc can thus continue to frame the opposition not only as divided and inexperienced, but also as programmatically anachronistic: formally updated on paper, yet substantively out of sync with the demands of the current conjuncture.

Internal cohesion presents a further challenge. Both the CHP and the İYİ Party have been plagued by factional struggles, leadership contests and ideological disputes. In the CHP's case, the tension between traditional Kemalist-statist currents and more reformist or social-democratic segments has generated recurrent crises over candidate selection, alliance strategies and the balance between identity and class-based appeals. İYİ Party, for its part, has faced difficulties in balancing its nationalist roots with the need to appeal beyond its core base, leading to cycles of fragmentation, resignations and public infighting. These internal conflicts not only consume organisational energy; they also send out negative signals to voters about the opposition's capacity to govern coherently. Elite-level divisions are amplified by social media dynamics, where intra-opposition criticism often becomes more visible than constructive programmatic work.

Finally, certain strategic choices - such as an overemphasis on "[softening](#)" (yumuşama), or premature personalisation of presidential candidacies - have inadvertently strengthened the incumbents. Efforts to normalise relations with the government without clear institutional guarantees risk demobilising opposition supporters and legitimising the existing order without extracting concessions. Similarly, the early elevation of figures as inevitable presidential candidates has allowed the ruling bloc to target them through legal, media and institutional means, narrowing the opposition's room for manoeuvre. In combination, these factors contribute to a perception that, while the opposition can occasionally win important local victories, it lacks the depth, discipline and strategic clarity required to engineer a systemic change in national politics.

Conclusion: Prospects for Change under Hegemonic Authoritarianism

The analysis presented in this policy paper suggests that the prospects for a medium-term change in power in Turkey remain uncertain and, under current conditions, structurally constrained. The AKP-MHP coalition has succeeded in constructing a hegemonic authoritarian order grounded in bureaucratic control, nationalist-conservative social alliances and advantageous external conditions. This order has proven resilient even in the face of serious economic downturns and governance failures. While these failures create potential vulnerabilities for the ruling bloc, they do not automatically translate into opposition gains.

For the opposition, the challenge is twofold. On the one hand, it must navigate a political arena in which the rules of the game are tilted against it: media concentration, legal repression, bureaucratic partisanship and securitisation of dissent create formidable barriers to effective contestation. On the other hand, it must confront its own internal weaknesses: limited cadre development, unclear policy platforms, leadership deficits and persistent intra-party conflicts.

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From a policy perspective, three implications follow. First, international actors - including the EU and its member states - should recognise both the structural nature of hegemonic authoritarianism in Turkey and the fragility of opposition forces operating within it. Rather than episodic moral condemnation or purely transactional engagement, external policy should seek to support pluralism, rule-of-law safeguards and societal resilience in ways that do not simply reinforce government narratives of foreign intervention. Secondly, opposition parties need to invest seriously in organisational renewal: recruiting and training new cadres, formulating detailed and credible policy proposals, and building durable channels of communication with societal groups beyond their traditional bases. Finally, any realistic strategy for democratisation will have to confront, rather than indefinitely defer, the Kurdish question and broader issues of inclusive citizenship. Without a principled and politically imaginative approach to these questions, attempts to build broad opposition coalitions will remain vulnerable to securitising narratives and divide-and-rule tactics.

All in all, unless there is a significant shift either in the balance of power within the state apparatus or in the strategic

behaviour of opposition parties, a change of government in Turkey in the medium term will remain difficult to effect. The current constellation is one in which an incumbent hegemonic bloc, despite its growing performance deficits, continues to enjoy structural advantages that the opposition has not yet found a way to neutralise. Understanding and addressing this asymmetry is crucial for any effort - domestic or international - aiming to support democratic resilience and the possibility of political alternation in Turkey's second century.

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Greek & European Economy

Reducing the Motherhood Penalty in Greece: Lessons from Norway

The Return of (Neo-) Protectionism: US Tariffs and Beyond

The Housing Problem in the European Union and Greece: Key Dimensions and Policy Responses

Reducing the Motherhood Penalty in Greece: Lessons from Norway

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Abstract

This paper draws on the emerging literature that has established that the employment rates and the earnings of men and women start to diverge once they have children, with women's labour market performance deteriorating, while that of men's left unaffected or even improving. This phenomenon has been dubbed *the motherhood penalty* (or *the child penalty*). The size of the penalty is affected by the choices parents make as regards employment and childcare, which in turn are affected by gender norms, instilled in women and men early in life, but also by public policies aiming to establish a better work-life balance and help working mothers and fathers combine bringing up a child with pursuing a career. The paper reviews cultural norms and institutional arrangements as potential determinants of mothers' employment in two polar cases: Greece (where female employment is low, and child penalties large) compared to Norway (where female employment is high, and child penalties are virtually non-existent). The paper concludes with a list of policy recommendations, inspired by our understanding of the gradual emergence of family-friendly work-life policies in Norway, and informed by our awareness of constraints facing policy makers in Greece.

1. Introduction

Low female employment resembles an underused asset, which is why raising it is a prerequisite for higher living standards at personal and national level. In several countries in Europe and beyond, the scope for raising total employment by mobilising inactive women is considerable. In Greece, the female employment rate has risen significantly over the last four decades, from 35.8% in 1981 to 59.9% in 2024 (in the 20-64 age group) ¹. Institutional reforms (e.g. in family law), and the favourable economic conditions created by Greece's accession to the European Union, both in the early 1980s, greatly facilitated women's labour market participation in the country. Still, female employment in Greece is the second lowest in the EU (above Italy), and lags far behind the EU average (70.8% in 2024). Also, the gender employment gap, although narrower than in the past, is as large as 18.8 percentage points, compared to 10.0 in the EU. In Norway, the female employment rate in the 20-64 age group was 77.4% in 2024, and the gender employment gap 5.1 percentage points².

Employed women differ from their male counterparts in terms of pay. In 2018 (latest year for which detailed data are available³), the unadjusted gender pay gap, defined as the percentage difference between women's and men's mean gross hourly earnings, was lower in Greece (10.7%) than in the EU as a whole (14.4%). In Norway, the unadjusted gender pay gap was 13.2%.

However, in a context of low female employment, high-skilled women tend to self-select into work, while lower-skilled are less likely to be in employment. As a result of that, in Greece employed women have on average more productive characteristics, and work in better-paying segments of the labour market, than employed men. Taking such differences into account, that is comparing wages of women and men with similar characteristics, raised the *adjusted* gender pay gap to 11.7% in 2018. In contrast, in the EU as a whole, adjusting for characteristics lowered the gender pay gap to 11.3%. In Norway, the adjusted gender pay gap was 8.4% (Pérez-Julián and Leythienne 2023).

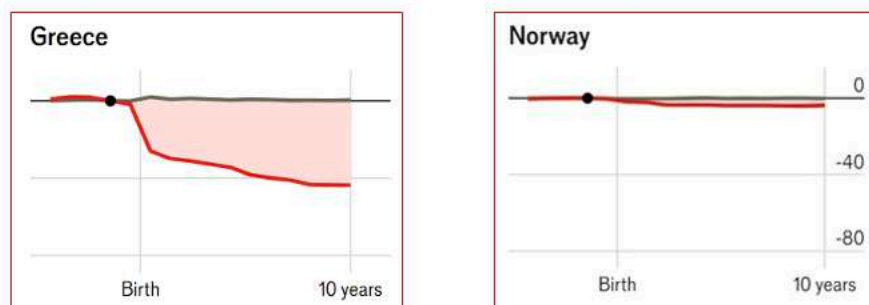
Note that the adjustment, based on firm-level data, accounts for differences in demographics (age, region of residence) and productive potential of individual workers (education, work experience, occupation, sector of economic activity, firm size, type of contract, working schedule), but does not consider marital status or household composition, including the presence and number of children.

The omission is crucial. An emerging literature⁴ has established that employment rates and earnings levels of men and women start to diverge once they have children, with women's labour market performance deteriorating, while that of men's being unaffected, or even somewhat improving. This phenomenon has been dubbed *the child penalty*, applying to employment probabilities, hours of work, wage rates, and annual earnings. Furthermore, the proportion of the gender gap in employment and earnings that can be explained by the child penalty has increased from 40% in 1980 to 80% 2013 (Kleven, Landais & Sogaard 2019). In view of that, individual careers should be observed over time in order to identify the points at which changes in individual circumstances result in gender gaps in employment and pay, a method known as *event study approach*.

As it turns out, in Greece there seems to be no child penalty for men, while women's employment decreases by as much as 37.9% when the first child arrives. This is in line with the experience of other South European countries, such as Spain (38.2%), or Italy (32.9%). In contrast, the child penalty is significantly lower in Denmark (14.1%) and Sweden (8.9%),

while it is negligible in Norway (3.3%)⁵ (Kleven, Landais & Leite-Mariante 2024, pp. 55-57). This is shown in Figure 1 below.

Figure 1: The child penalty in Greece and Norway



Source: The Economist "How motherhood costs careers" (30 January 2024), based on results from Kleven, Landais & Leite-Mariante (2024).

The evidence suggests that the child penalty is primarily associated with a reduction in mothers' employment, either in terms of numbers employed or of hours of work, rather than with a reduction in earnings (per hour) of those who continue to work:

"The precise facts about the size of the penalty and how much of the total difference in earnings by gender it accounts for depend on the country, the years of the data, and the estimation procedure. But the weight of the evidence is that the earnings of women plummet with the event of a birth and do not recover. Furthermore, most of the change comes from a reduction in hours of work or in participation, rather than from a reduction in earnings per hour, although that factor contributes somewhat." (Goldin 2024, pp.1530-1531).

What explains the child penalty? It is worth quoting at some length a recent study by Andresen & Nix (2022), who summarized the "five common explanations for the child penalty" as follows:

"First, only women can give birth, and generally only the woman gives birth breastfeeds. Giving birth is a major health shock that can have consequences for productivity and earnings. While most health shocks from pregnancy and birth are concentrated in the 6 months after birth, some have longer-term consequences. Time spent with the child while breastfeeding and time at home with the child while recovering from giving birth may also cause the birth mother to spend more time with and grow more attached to the child and make her the default caregiver, with long-term earnings consequences. Second, households may specialize after birth since women often make less than their husbands and thus may have a comparative advantage in household work. Third, women may enjoy spending time with children more than men. Fourth, couples may default to traditional gender norms when deciding who should bear the costs of child-rearing. Fifth, employers may discriminate against mothers." (Andresen & Nix 2022, pp. 972-973).

Rather ingeniously, the authors set out to disentangle these explanations, and to identify the relative weight of alternative drivers of the child penalty, by comparing the labour market trajectories of three types of parents: heterosexual, adopting, and same-sex couples. Their results provide evidence against the first two of the five explanations for the child penalty. On the one hand, the strong similarity of child penalties for adopting and heterosexual couples (around 20% to 25%), compared to the lower (10%) and far more equally shared child penalties of mothers in same-sex couples, "demonstrate that maternal health shocks related to childbirth and pregnancy are unlikely to be driving the child penalty, although the short-term differences between mothers in same-sex couples suggest a potentially small role for the costs of birth in the first 2 years" (Andresen & Nix 2022, p. 974). Moreover, they find little evidence in support of the hypothesis that mothers and fathers may have a comparative advantage in household work and in the labour market respectively⁶. That leaves differences between mothers and fathers in preferences for childcare, traditional gender norms, and discrimination by employers, as the main explanations, although their data did not allow them to distinguish between those three factors (Andresen & Nix 2022, p. 974).

The motherhood penalty is likely to be larger when the child needs greater attention: a recent study of parents' choices as regards work and care based on data in Norway showed that caring for children with disabilities has a negative effect on mothers' labour market participation, working hours and labour income (Wondemu et al. 2022).

Furthermore, external demands for parental involvement may reinforce gender bias: a field study found that schools in the US tend to call the mother more often than the father for school-related requests, even when the father has signalled his availability (Buzard et al. 2024).

To assess the significance of cultural norms as potential determinants of mothers' employment in Greece in comparison to Norway, the next section draws on opinion survey data. This is then followed by an analysis of the institutional arrangements that facilitate work-life balance in the two countries. After a brief discussion of the joint role of norms and institutions in shaping parents' choices as regards paid work and childcare, the paper concludes with a summary of the main findings and a short list of policy recommendations.

2. Cultural norms

The channels through which gender norms, instilled in women and men early in life, affect parents' choices as regards employment and childcare are well established. Women whose mother did not work, or in societies where working mothers are frowned upon, are more likely to abstain from the labour market and engage in unpaid care once they have children (Kleven, Landais, Posch, Steinhauer & Zweimüller 2019). Notably, the same transition mechanism does not seem to operate in the case of men: in their study of Denmark, Kleven, Landais & Søgaaard (2019) find that child penalties are transmitted through generations from parents to daughters but not to sons.

Opinion surveys provide evidence on the strength or weakness of such norms in society.

A recent Eurobarometer survey⁷ on gender stereotypes found that in Greece traditional norms remain well entrenched. As many as 70% of respondents in Greece "totally agreed" or "tended to agree" with the statement: "All in all, family life suffers when the mother has a full-time job". In the EU as a whole, 51% did⁸. Still, traditional norms seem to be on the retreat. The share of respondents agreeing with the same statement 10 years earlier had been 75% in Greece and 60% in the EU as a whole⁹.

Eurobarometer surveys do not extend to Norway. Nonetheless, when (in 2008) respondents in Norway were asked to respond to a comparable statement ("A child of preschool age is likely to be negatively affected if the mother is in paid employment"), 60% strongly disagreed while another 20% disagreed (Kitterød & Teigen 2021).

Another question in the 2024 Eurobarometer survey directly tackled the difficulty of reconciling work and family responsibilities, and the dilemma that couples face when they have to choose. In Greece, 48% of respondents thought that "women should give priority to their family responsibilities over their career" (compared to 34% in the EU as a whole)¹⁰.

In contrast, in a 2019 survey conducted in Norway, 73% of respondents strongly agreed that "women have the same need for a professional career as men", while another 17% partly agreed (Kitterød & Teigen 2021).

Participants to the 2024 Eurobarometer survey were also asked to state whether they agreed or disagreed with the following statement: "If the father's pay is lower than that of the mother, he is the one who should give up work to look after the children, if a family decides one parent has to do so". In Greece, 40% "totally agreed" or "tended to agree" with this statement; in the EU as a whole, 51% did¹¹. Again, the influence of traditional norms seems to have grown weaker over time: in a previous Eurobarometer survey¹² conducted in 2009, the share of those agreeing with the same statement in Greece and in the EU as a whole had been 23% and 48% respectively.

In the same survey, women in Greece were significantly more likely to agree that, if the mother earned more, and if the couple decided that one of them should give up work to look after the children, it should be the father: the share of women vs men agreeing with the statement was 46% vs 34%. On the contrary, in the EU as a whole, there was little difference in responses: 51% for women vs 50% for men. In Greece, the share agreeing was greatest (57%) among women aged 25-39, and lowest among men of the same age group (29%)¹³.

On the other hand, attitudes to parental leave appear to be a lot more relaxed, both in Greece and the EU as a whole. In Greece, a large majority of respondents (84%) agreed that “taking parental leave is enriching for a father”¹⁴, while an equally large majority disagreed that “men taking parental leave show a lack of ambition for their career”¹⁵ (82%). That was actually higher than the EU average (81% and 77% respectively).

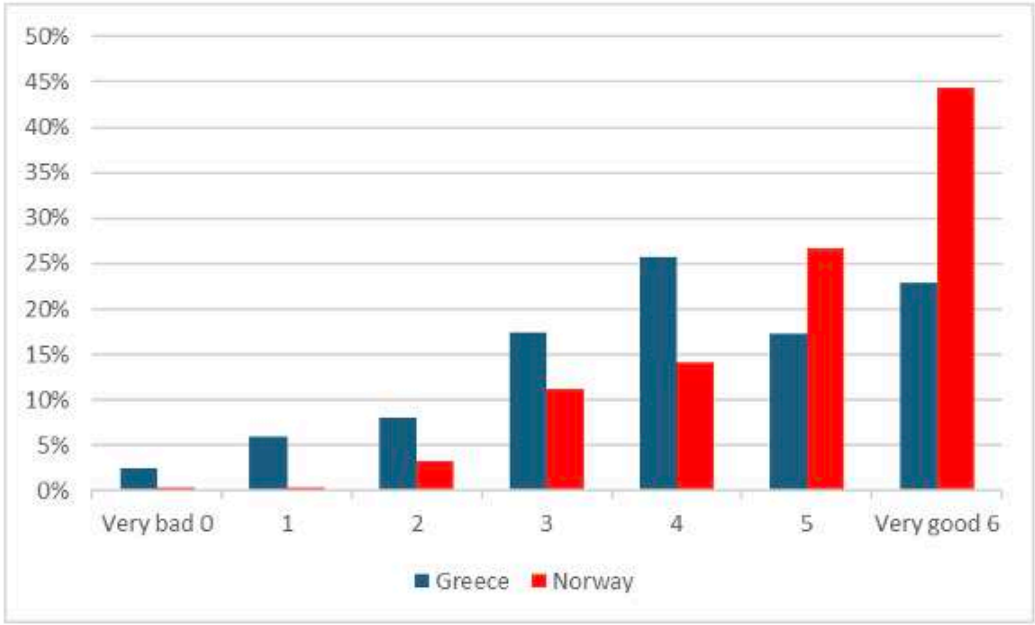
Unlike Eurobarometer, other surveys provide direct evidence on both countries. Data from the World Values Survey and the European Values Survey, jointly conducted in 2017-2022¹⁶, revealed that clear majorities in both countries disagreed that “pre-school children suffer when their mother works”. Nonetheless, opposition to that view was stronger in Norway, where 74% of respondents “disagreed” or “strongly disagreed” with the statement, than in Greece, where 59% did. Furthermore, the share of those disagreeing strongly was significantly higher in Norway (54%) than it was in Greece (13%)¹⁷.

On a related point, in Norway 83% of respondents “strongly disagreed” and a further 9% “disagreed” with the view that men should be hired ahead of women if jobs are scarce. Responses in Greece were more evenly balanced: only 14% “strongly disagreed”, and another 28% “disagreed”, compared to 24% who said they “agreed”, and 13% who “strongly disagreed”. Interestingly, as many as 19% of respondents in Greece neither agreed nor disagreed that men should have more right to a job than women if jobs are scarce, while only 4% were uncertain about that in Norway¹⁸.

The European Social Survey also covers both countries. Round 11, conducted in 2023/2024¹⁹, included the following question: “Is it bad or good for family life if equal numbers of women and men are in paid work?” In Norway, 44% of respondents thought it was “very good” (6 on a scale from 0 to 6), and another 27% that it was “fairly good” (5 on a scale from 0 to 6), if equal numbers of women and men worked; in Greece, the corresponding shares were 23% and 17% respectively. The total share of those taking a negative view of employment rate parity between men and women (0 or 1 or 2 on a scale from 0 to 6) was 3% in Norway vs. 17% in Greece²⁰.

The distribution of responses to that question in the two countries is shown in Figure 2 below.

Figure 2: Bad or good for family life if equal numbers of women and men are in paid work



Source: ESS11 (2023/2024).

3. Institutional arrangements

In this section we review how work-life balance policies in the two countries help working mothers and fathers combine bringing up a child with pursuing a career.

3.1. The EU Work-Life Balance Directive

Governments in Europe and beyond now accept that public policy ought to facilitate the reconciliation of work and care responsibilities²¹. Indeed, “work-life balance” features as Principle 9 of the European Pillar of Social Rights, jointly proclaimed by the European Parliament, the European Council on behalf of all Member States, and the European Commission, at the Gothenburg Summit in November 2017. Principle 9 reads as follows:

“Parents and people with caring responsibilities have the right to suitable leave, flexible working arrangements and access to care services. Women and men shall have equal access to special leaves of absence in order to fulfil their caring responsibilities and be encouraged to use them in a balanced way.”

Following the proclamation of the European Pillar of Social Rights, the European Commission worked on a Work-Life Balance Directive as one of the actions to further implement the Pillar principles. The Directive proposal was adopted in June 2019²². Member States had three years to implement the new Directive in national law. The new rules were not intended to replace but rather to supplement the rights established under a past Directive²³, according to which female workers had the right to a minimum of 14 weeks of maternity leave, of which at least two being compulsory, compensated at least at the national sick pay level. The new rules came into force in August 2022. The key provisions of the new Directive were:

- *Paternity leave*: Working fathers are entitled to at least 10 working days of paternity leave around the time of birth of the child. Paternity leave must be compensated at least at the level of sick pay.
- *Parental leave*: Each parent is entitled to at least four months of parental leave, of which two months is paid and non-transferable. Parents can request to take their leave in a flexible form, either full-time, part-time, or in segments.
- *Carers’ leave*: All workers providing personal care or support to a relative or person living in the same household have the right to at least five working days of carers’ leave per year.
- *Flexible working arrangements*: All working parents with children of up to at least eight years old and all carers have the right to request reduced working hours, flexible working hours, and flexibility in the place of work.

As seen shortly, the 2022 Work-Life Balance Directive has resulted in new legislation in Greece, aimed to bring national law in line with European law, extending social rights and introducing new ones.

3.2. Parental leave

Economic theory (see for instance Boeri & van Ours 2021) predicts that mandatory parental leave will have a positive effect on the labour supply of mothers at the extensive margin (i.e. it will result in more mothers being employed), though it may have a negative effect at the intensive margin (i.e. it may cause working mothers to reduce their hours of work). Specifically, the birth of a child affects the preferences of parents for market work:

“Suppose that childbirth increases, at least temporarily, the opportunity cost of market work for mothers. This will result in an increase in the reservation wage of women. In the initial weeks after childbirth, this reservation wage may then be higher than the wage offered by the job held by the mother. As the child ages, however, the reservation wage is bound to decline, since the time spent by the mother with the child is more valuable when children are younger. Thus, at some date or age of the child, the mother will be willing to go back to work in her initial position, as her reservation wage falls below the market wage.” (Boeri & van Ours 2021, p. 185)

The availability of parental leave changes the calculus:

"If the parental leave is long enough, then the mother will take the leave [...] and then go back to her original job. If instead the parental leave is not sufficiently long or is not offered at all, then the mother will quit her old job. New jobs obtained immediately after maternity periods are typically paid less than the old jobs. Then the mother will resume working later, if there is no mandatory parental leave. Thus, quite paradoxically, mothers may spend more time not working without parental leave than with it." (Boeri & van Ours 2021, pp. 185-186)

Moreover, parental leave increases the value of a job for women, further boosting female labour supply:

"It is plausible that at some stage women consider the option to take parental leave well before actually having a child. This creates an additional labor supply-enhancing mechanism: mandatory parental leave increases the value of a job for women, as when accepting a job offer, she anticipates that there will be higher utility gains after childbirth. Hence, the labor supply of women, at least measured in terms of headcounts rather than hours per worker, is enhanced by mandatory parental leave." (Boeri & van Ours 2021, p. 186)

More broadly, parental leave prevents the loss of human capital:

"This longer period outside work may also hamper career advancement of women and induce a deterioration of the skills of mothers before they return to work (Rønsen & Sundström 2002). This explains why employers typically offer parental leave even when they are not legally compelled to do so. Yet the leave offered by employers is likely to be too short for those mothers who have stronger preferences for staying with their children. Government intervention can prolong the leave, preventing losses of human capital for these women. Indeed, governments face a different trade-off than individual employers do. Private benefits of parental leave are generally lower than social benefits. For governments, the loss of human capital associated with inadequate parental leave is more important than for the firms involved." (Boeri & van Ours 2021, p. 186)

Nonetheless, whether parental leave induces mothers to spend more time working than they would do in the absence of parental leave (formally: whether the positive effects at the extensive margin are stronger than the negative ones at the intensive margin) remains uncertain:

"Parental leave potentially has complex effects on labor supply. On the one hand, it is an entitlement that one can only qualify for by having a job in the first place. And, by giving workers the right to their job back after taking the leave, the entitlement raises the job prospects of those who have left the labor force after the birth of a child. These effects suggest that parental leave would increase women's labor force participation rate. On the other hand, parental leave mandates may encourage women to stay out of the labor force longer than they otherwise would. In addition, such mandates may raise the expected cost of employing women of childbearing age, thus potentially lowering their wages and possibly deterring employers from hiring them. Thus, parental leave has theoretically ambiguous effects on women's labor supply." (Blau & Kahn 2013, p. 252)

Ambiguity at a theoretical level opens the issue to empirical analysis of the factors at play in a specific place and time. Recent research of the effects of parental leave legislation on female employment and earnings in high-income countries has found that the positive and negative effects may offset each other: Olivetti & Petrongolo (2017, p. 228) found 'little compelling evidence that extended parental leave rights have an overall positive effect on female outcomes', while Kleven, Landais, Posch, Steinhauer & Zweimüller (2024 p. 125) concluded that parental leave "has a negative effect on gender gaps in the short run but a precisely estimated zero effect in the long run."

The findings of a very recently published study (Bailey et al. 2025) reinforce the scepticism. From July 2004, California's Paid Family Leave Act offered mothers six weeks of partially paid leave to bond with a newborn. The results suggest that the law had no overall effect on mothers' labour outcomes, while it appears to have actually reduced employment and earnings for first-time mothers.

It is important to note that in the studies reviewed above parental leave often translates to maternity leave alone. Therefore, it is hardly surprising that the long-run effects on gender employment gaps are not found to be large. Evidence from Norway, Sweden and Denmark suggests that when paternity leave is generous, and cannot be transferred to the

mother, child penalties are much lower and gender employment gaps much narrower (Kleven, Landais & Leite-Mariante 2024; Ellingsæter 2024).

Furthermore, while it is possible that maternity leave policies may reinforce traditional gender roles, unintentionally hindering progress towards closing the gender gaps in employment and earnings, labour demand responses are often crucial. Depending on policy design, maternity leave may be costly for employers. In view of that, employers may react to maternity leave entitlements by hiring fewer female employees if perceived to be likely to have a child at some point in the future.

In fact, recent EU legislation on paternity leave, following longer-standing practice in Nordic and other European countries²⁴, may be viewed as an attempt to neutralise possible discriminatory responses of employers:

“As mandatory parental leave is costly for employers, it is likely to have negative effects on the demand for women (Ruhm 1998). It is precisely to avoid the negative effects of mandatory parental leave on employment and wages of women that more and more countries are introducing mandated or incentivized paternity leave. The purpose of these schemes is to reduce asymmetries between men and women in terms of labor costs in the perceptions of employers, avoiding preferential treatment for men in hiring policies.” (Boeri & van Ours 2021, p. 187)

There is evidence that mandatory non-transferable paternity leave leads to better labour market outcomes for mothers. The introduction in 2006 of a “daddy quota” in Quebec, Canada (offering the choice of five weeks leave at 70% of earnings or three weeks leave at 75% of earnings), not only raised take up of paternity leave by fathers²⁵, but also substantially increased mothers’ employment as well. As a result of the “daddy quota”:

“Quebec mothers exposed to the policy are 7% more likely to participate in the labor force, 5- 6% more likely to work full-time and 4-5% less likely to work part-time.” (Dunatchik & Özcan 2019)

As the example of Quebec Parental Insurance Plan demonstrates, paternity leave is more likely to be effectively taken up when it cannot be transferred to the mother. In fact, making the fathers’ quota of parental leave available on a “use-it-or-lose-it” basis caused the average number of days of leave in Iceland to rise from 39 in 2001 to 103 in 2008 (Moss 2014). Also, demand for paternity leave increases with the rate of earnings replacement (Shand 2018). The share of fathers taking up paternity leave in Estonia rose from 14% of eligible fathers in 2007 to 50% in 2008 after paternity leave benefit was raised to 100% of previous earnings (Addati et al. 2014).

As shown below, non-transferrable paternity leave has a long-established tradition in Norway, and has been recently legislated in Greece, while maternity leave in both countries is more generous than in the US.

3.2.1. Parental leave in Norway²⁶

Parental leave in Norway, regulated under the National Insurance (*Folketrygdløven*) Act §14, comes in two combinations of duration and pay:

- 49 weeks at full pay, or
- 59 weeks at 80% of full pay.

Parental leave is divided between mothers and fathers (or co-parents in same-sex couples) according to the following rules:

- Mothers must take 3 weeks of leave before the expected due date, and at least 6 weeks after birth, unless they receive a medical clearance that they can return to work earlier.
- Fathers or co-parents are entitled to a quota of at least 15 weeks (if using the full-pay option) or 19 weeks (if using the 80% pay option). This is a “use-it-or-lose-it” portion of the leave. If the father or co-parent does not take this leave, the main rule is that it cannot be transferred to the mother.

The rest of the leave (18-26 weeks, depending on the duration-pay combination chosen) can be shared between mother and the father or co-parent as they like. Under certain circumstances²⁷, the mother can take the father or co-parent quota. Since 2014, over 60% of fathers have taken the full paternity quota or more, even though the father or co-parent quota has been extended several times between. Of those who became fathers in the year 2020, 50% took exactly the paternity quota, while 17% took a longer leave (Evensen et al. 2023; Arnesen 2024)²⁸.

In addition to this, the father or co-parent is entitled to 2 weeks of leave to assist the mother giving birth. If the parents do not live together, another person assisting the mother may apply for this leave. Many employees have a collectively agreed right to full pay during these two weeks.

Furthermore, parents can choose to take leave part-time while working part-time, allowing them to extend their total time at home. Leave can also be postponed or spread over a longer period if agreed upon with the employer.

Parental leave benefits are based on parents' income prior to the leave period. The calculation varies according to employment status. In the case of employees, freelancers and self-employed, parental leave benefit is equal to the average earnings of the parent over the last 3 calendar months before the leave. In the case of social assistance or unemployment benefit recipients, parental leave benefit is equal to the value of the social benefit received. In addition, specific rules apply to fishermen, and those enlisted in military service.

To be entitled to parental leave benefit, parents must fulfil three criteria:

- must be a member of the National Insurance scheme;
- must have had an income (from work, social benefits or military service) for at least 6 of the last 10 months prior to the start of parental leave;
- must have earned at least 50% of the National Insurance basic amount²⁹.

The Labour and Welfare Administration (*NAV*) bears the cost of the parental leave up to an income level of 6 times the basic amount³⁰. Some high earners are covered by a collective agreement, with employers paying the difference between parental leave benefit (capped at 6 times the National Insurance basic amount) and actual earnings. For example, this is the case of public sector workers. Others receive less- than-full compensation for lost earnings in excess of 6 times the basic amount.

Parental leave in Norway comes with strong legal protections. In the case of employees, parents have a right to return to the same position as prior to parental leave. If this is not possible, they must be offered an equivalent position with similar terms. Parents on leave are protected against dismissal: employers cannot terminate their contract due to parental leave. If an employee is dismissed during or shortly after parental leave, the employer must prove that the termination is unrelated to the leave. Moreover, seniority and benefits are maintained during parental leave. Pregnant employees also have legal protections, including the right to pregnancy-related leave before birth.

Job protection in Norway is universal: employees in private firms enjoy the same job protection rights as public sector workers, while part-time employees enjoy the same rights as full-time employees. There are two partial exceptions to that: self-employed workers, and temporary employees. In the latter case, while parents on temporary contracts have the same right to parental leave as all other employees, parental leave does not automatically extend the contract. If the contract was set to expire during parental leave, the employer is not obliged to renew it. If non-renewal is due to discrimination related to pregnancy or parental leave, which is illegal, the parent can file a complaint with the Equality and Anti-Discrimination Ombudsman.

Parents not entitled to parental leave benefits (for instance, students and others expecting a child not having worked at least 6 of the last 10 months) can choose to apply for a lump-sum grant, usually paid to the mother. In 2024, the lump sum grant was set at 92,648 NOK (€7,769) per child.

3.2.2. Parental leave in Greece

Parental leave entitlements in Greece differ by occupational group.

Public sector employees are entitled to 5 months of standard maternity leave. Its duration is longer in the case of large families (by 2 months for each child after the third), and in that of multiple births (by 1 month for each child after the first). While on standard maternity leave, mothers working in the public sector are entitled to full pay.

Private sector employees are entitled to 4 months of standard maternity leave. Earnings are replaced in full (up to a cap of €2,374 per month) according to the following rule:

- The Social Insurance Agency (*ΕΦΚΑ*) pays maternity leave benefit at 50% of reference earnings (i.e. the presumptive earnings of the insurance class to which the employee is placed) for 4 months; to qualify for maternity benefit, the employee is required to have a contribution record of at least 200 days over the last 2 years.
- The employer pays the equivalent of 30 days of full earnings (15 days in the case of employees who have been with the firm for less than one year); the employer is allowed to deduct maternity leave benefit (paid by *ΕΦΚΑ*) from the amount paid to the employee.
- The Public Employment Service (*ΔΥΠΑ*) pays supplementary maternity benefit equal to the difference between earnings lost and maternity benefit paid; to qualify for supplementary maternity benefit (paid by *ΔΥΠΑ*), the employee is required to have already been in receipt of maternity benefit (paid by *ΕΦΚΑ*).

Self-employed workers are not entitled to maternity leave as such, nor are they required to prove that they refrain from working to qualify for maternity benefit. Own-account workers and liberal professionals are entitled to 4 months of maternity benefit, at €150 and €200 a month respectively. A maternity allowance, paid as a lump sum, is also available for farmers (€487). Lastly, mothers who can prove that they work regularly, but without insurance coverage, living in households with a monthly income below €587, may be eligible for maternity benefit equal to €440, paid in two instalments.

In addition, a special maternity protection leave, paid at a lower rate, is available for working mothers. In November 2022, its duration was set at 9 months in the case of private sector employees. In April 2024, coverage was extended to farmers and the self-employed (for children born after 24 September 2023), also for a period of 9 months. Special maternity protection leave is unpaid, as far as employers are concerned. Earnings replacement is provided by a flat benefit, at the statutory minimum wage rate (currently €830 per month), paid by the Public Employment Service (*ΔΥΠΑ*). Mothers are allowed to transfer up to 7 (out of a total of 9) months of special maternity protection leave to fathers. Anecdotal evidence suggests this happens rarely, if ever.

Lastly, since June 2021, working fathers are entitled to 14 days of paid leave (for children born after 19 June 2021), on full pay, paid for by the employer. Paternity leave is available to all employees (though not for the self-employed); eligibility is not conditional on the contributory record of the worker concerned, nor on his marital or family status. Take up is believed to be low, although no data are available.

3.3. Flexible working arrangements

Working mothers wishing to combine career and family commitments may come up against several obstacles, some subtle. Goldin (2014) has found that in the US labour market, in sectors such as law or finance, pay rises non-linearly with working time, so that shorter work schedules are paid disproportionately less. When this is the case, opting for part-time employment or more generally fewer hours of work carries a hefty penalty in terms of pay, actively discouraging the time flexibility that working mothers prize after the arrival of a child. Faced with lower potential earnings, female workers in law or finance, particularly those with higher-earning spouses, often choose to give up working when they become mothers.

In those professions, when they give birth, working women are perceived by employers to signal that they are on the “mommy track,” prioritising flexible or reduced work hours over career advancement. Employers’ views of working mothers as less committed to the job, in turn, cause them to be passed over for promotion, becoming a self-fulfilling prophecy (Ty Wilde *et al.*, 2010).

On the contrary, working time flexibility is less penalizing in other professions. In the US, hourly pay for pharmacists varies less with the length of the working day, as a result of which “female pharmacists with children often work part-time and remain in the labor force rather than exiting” (Goldin 2014, p. 1117).

More generally:

“There are many occupations and sectors that have moved in the direction of less costly flexibility. Firms in many sectors, including healthcare, retail sales, banking, brokerage, and real estate, are making their employees better substitutes for each other and trying to convince their clients of that. When clients perceive there is a greater degree of substitutability among workers, a more linear payment schedule emerges.” (Goldin 2014, p. 1117)

In contrast to the US, both Norway and Greece offer different institutional and cultural frameworks worth exploring.

3.3.1. Flexible working arrangements in Norway

All employees in Norway, including parents, are entitled to flexible working arrangements if that does not cause significant inconvenience to the employer. Parents may for instance adjust working hours as needed during the day or week. Such flexible working arrangements can help ease time pressure related to dropping off and picking up children at/from daycare or school. Alternatively, parents may work more during certain periods, and take time off later in the year.

In certain situations, parents also have a right to reduced working hours to look after a small child. It is important to stress that employers cannot deny flexible working hours or part-time, unless they have a good and concrete reason for doing so.

As of today, there is no general statutory right to work from home. Nevertheless, remote work is often practiced, in agreement with employers.

Working mothers with a working day schedule of 7 hours or more are entitled to a break of up to 1 hour per day on full pay to breastfeed their child, until the child is one year old. Many employees have extended rights to breastfeeding breaks (typically, two hours per day, until the child is two years old). Furthermore, breastfeeding mothers are entitled to workplace accommodations (such as protection from harmful substances) and, if necessary, reassignment if the work poses a risk to the child, or to the mother’s milk production.

Employers also have a general obligation to facilitate the working environment for pregnant workers, so that neither the mother nor the foetus are exposed to health risks. This may involve exempting pregnant employees from heavy and hazardous duties, adjusting work tasks or reducing working hours. If adaptation or reassignment is not possible, and the work poses a risk to the foetus, the pregnant employee has the right to a temporary leave of absence. Pregnant employees in hazardous jobs receive the associated pregnancy leave benefit from the Labour and Welfare Administration (NAV), which provides income security during the period when the employee is unable to perform her regular work.

3.3.2. Flexible working arrangements in Greece

Working parents in Greece are entitled to shorter working schedules. In the public sector, they may work 2 hours a day less if the child is aged 0-2, or 1 hour a day less if the child is aged 2-4, for a period from the end of maternity leave to the child’s fourth birthday (or longer in the case of single parents, disabled children, and large families). In the private sector, the working time reduction is 1 hour a day for 30 months, or 2 hours a day for 12 months followed by 1 hour for a further 6 months.

In accordance with the 2019 EU Work-Life Balance Directive, since June 2021 parents with a child aged 12 or below have the right to request flexible working arrangements, including work from home, provided they have been with the same employer for at least 6 months. Employers are required by law to consider the request and accept it or explain why they reject it within 1 month.

Anecdotal evidence suggests that employers in most small and medium-sized firms are extremely reluctant to concede employees flexible working arrangements. Larger firms tend to be more open to their employees' requests for flexible working arrangements.

3.4. Carer's leave

This is often difficult to distinguish from maternity or paternity leave. Carer's leave is taken here to imply an entitlement to leave of absence for the care of a child beyond the immediate period after birth. Carer's leave is typically available over a longer time span, e.g. until the child is aged 8 (as is the case in Greece) or aged 12 (as is the case in Norway). Also, carer's leave may interact with flexible working arrangements, if parents are allowed to convert one entitlement into another.

3.4.1. Carer's leave in Norway

Working parents in Norway have each a right to paid leave of absence up to 10 days each year to care of a child in need of medical attention, or if the child's caretaker is ill. If the parent takes care of more than two children, the right is extended to 15 days. Single parents have a right to twice the length, i.e. respectively 20 and 30 days of paid leave. The right applies until the child turns 12, unless the child has chronic or long-term illness or a disability. If this is the case, and the illness/disability leads to a significantly higher risk of absence from work to take care of the child, the right applies until the end of the year in which the child turns 18. To be entitled to care benefits from the employer, the child's illness must be documented with either self-certification (for short absences, of up to three days), or a medical certificate (for longer absences). Both permanent and temporary employees are entitled to carer's leave.

Carer's leave benefit is paid by employers, if the employment relation has lasted for at least 4 weeks. The benefit level is calculated in the same way as parental benefit (i.e. full compensation up to 6 times the basic amount, with some high earners being covered by collective agreements covering the excess amount). Employers may demand a refund from the National Insurance Scheme, if they have paid for more than 10 days' worth of carer's leave benefit to an employee within a calendar year. Employers get a full refund if they have paid carer's leave benefits to employees taking care of a chronically ill or disabled child.

Employees not entitled to carer's leave benefit from the employer may receive the benefit in question from the National Insurance Scheme. This also applies to freelancers and self-employed workers, subject to a 10-day waiting period (waived if the child is disabled or chronically ill).

When a child starts daycare or school, parents usually need to support the child in the initial period. There is no statutory right to a leave in such situations, but many collective agreements provide for parents' right to short-term leave, paid or unpaid. For example, municipal employees are granted 1 day off in connection with the start of school, and up to 3 paid days for the start of daycare (both on full pay). Moreover, public sector workers may be granted up to 12 days of paid leave for "important welfare reasons", of which the start of daycare or school are explicitly recognised. Some firms also grant employees short-term "welfare leave" as part of personnel policies, collective agreements or workplace agreements.

Pregnant employees also have a right to paid leave to attend necessary prenatal check-ups with a doctor or midwife. This leave is paid in full by employers.

3.4.2. Carer's leave in Greece

Working parents of a child aged below 8 in Greece are entitled to 4 months of carer's leave, available to both parents, provided they have been with the same employer for at least 12 months. Carer's leave is unpaid as far as employers are concerned. Employees in private firms are eligible for carer's leave benefit equal to the statutory minimum wage, paid by the Public Employment Service (*ΔΥΤΑ*) for the first two months only.

In private firms, carer's leave entitlements may be converted to a shorter working schedule on the employee's request, with the employer's consent. Conversely, private sector workers eligible for a shorter working schedule may give it up in

return of approximately 14 weeks of carer's leave on full earnings (paid by the employer). Fathers are ineligible if the mother is not in employment. Similarly, public sector employees foregoing their right to a shorter working schedule are eligible instead for 9 months of carer's leave on full earnings.

Further to main carer's leave, working parents are also entitled to paid leave of up to 10 days per year to care for a child in case of serious illness or admission to hospital, of up to 4 days per year to monitor a child's school performance, and of up to 2 days per year to attend to other child-related emergencies (such as accidents). In addition, working parents are entitled to unpaid leave of up to 6 days per year to care for a sick child, raised to 8 days per year for parents of two, and to 14 days per year for parents of three or more children.

There is evidence that carer's leave entitlements are overwhelmingly taken up by mothers, even when both parents are eligible. An analysis of data on 160,000 female workers and 170,000 male workers in the mid-2010s showed that while 16.0% of women took the main carer's leave, only 0.9% of men did (Karamessini & Symeonaki 2019). A similar pattern was observed as concerned other types of carer's leave.

3.5. Childcare provision

Economic theory predicts that in the absence of subsidized childcare, mothers may choose to either work longer hours to make up for the income loss associated with the payment of childcare costs (if such costs are fixed and relatively low), or not to work at all (if fixed childcare costs are too large). Therefore, subsidized childcare in the presence of fixed childcare costs is likely to have a positive effect on labour force participation (the extensive margin) and a negative effect on hours of work (the intensive margin). If, on the other hand, working mothers operate on variable rather than on fixed costs of childcare, for instance because they have to pay for a babysitter or nanny, subsidized childcare will increase not only the number of mothers working, but also their hours of work (Boeri & van Ours 2021, pp. 183-185).

Empirical studies based on microdata and cross-country data have shown that the effects of childcare subsidies on mothers' employment are significant, especially in countries like the United States and Canada where the cost of childcare is higher to start with³¹. Also, a recent report commissioned by the ILO has estimated that investing in universal childcare and affordable long-term care services could generate up to 280 million jobs globally by 2030, and a further 19 million by 2035 (Addati *et al.* 2022).

Nevertheless, other studies³² provide a less optimistic view on the potential for childcare provision to raise female employment. In particular, a recent analysis of very large expansions of heavily subsidized childcare in Austria, based on detailed data covering the labour market and birth histories of Austrian workers from 1953 to 2017, found "a precisely estimated zero effect on mothers' careers, in the short run as well as in the long run" (Kleven, Landais, Posch, Steinhauer & Zweimüller 2024, p. 137).

Evidence from Norway points to the opposite direction: *Andresen & Havnes (2018) have shown that the expansion of childcare services for infants and toddlers in Norway (about which more below) has actually boosted the employment rate of cohabiting mothers from 63.4% in 2002 to 74.7% in 2008.*

Kleven, Landais, Posch, Steinhauer & Zweimüller (2024) argued that their findings point to the role of preferences and norms regarding maternal care:

"An overwhelming majority of [Austrian] women (70-80%) report that they do not work because they have a preference for taking care of their children. Furthermore, we find only a marginally significant correlation between these reported preferences and the level of childcare provision. This indicates that expanding access to institutional childcare has not shifted the strong norms regarding maternal care." (Kleven, Landais, Posch, Steinhauer & Zweimüller 2024, p. 141)

The availability of childcare provided by relatives (presumably free-of-charge) is known to contribute to that:

"Family policies encouraging formal versus informal childcare can be rather ineffective in increasing the labor supply of women. Parents often trust their relatives (e.g., their own parents) more than outside childcare givers, especially when the child is very young." (Boeri & van Ours 2021, pp. 186-187)

The design of policy may play an offsetting role here:

“If not only formal but also informal childcare is subsidized, then a lower transfer would be sufficient to convince women to resume working soon after childbirth.” (Boeri & van Ours 2021, p. 187)

As seen below, the idea of informal care subsidies was recently taken up in Greece.

Note that the benefits of universal access to affordable, high-quality childcare extend far beyond its effects on mothers' employment and earnings. A study of a policy reform in Spain lowering the age of eligibility for publicly provided universal pre-school from 4 to 3 years of age estimated a cost-benefit ratio of over 4 in the baseline scenario. The authors found that this result was mainly driven by the benefits of quality childcare for child development (i.e. the effects of improved skills on lifetime earnings). Gains in labour market outcomes for mothers (in terms of greater employment and reduced wage penalty) appeared to play a relatively minor role (van Huizen et al. 2019)³³.

3.5.1. Childcare provision in Norway

All children in Norway are legally entitled to a daycare place. The right applies to children who turn one year old by the end of November in the year parents apply for a daycare place. The municipalities are responsible for assuring that the right is effective. Norway has one of the world's most inclusive childcare systems, with high participation rates (93.8% of all children aged 1-5 years in 2024). The rate of participation is lower for children born in lower-income families, or to parents of lower education, or to parents with an immigrant background, especially if they have recently arrived and/or are less than fluent in Norwegian.

The 2003 Daycare Agreement was an important milestone in the development of childcare in Norway. As female employment increased, a shortage of daycare facilities had begun to manifest itself since the 1970s. In 2003, approximately 30,000 children were on waiting lists for a place in daycare. In response to this, the Socialist Left Party proposed a daycare reform. The party received support for its proposal from the Labour Party, the Progress Party, and the Centre Party.

Eventually, the opposition and the then minority government reached a compromise, the main elements of which were (i) the expansion of daycare facilities, (ii) the equal treatment of public and private daycare centres, with a coordinated admission process for all, (iii) the reduction in user costs through the introduction of a cap on parental fees, and (iv) a stress on quality and diversity in childcare provision.

The reform aimed to ensure that all families who wanted a daycare place would be offered one by 2005. The national government took a greater responsibility for financing the establishment and operation of daycare centres, while it was mandated by law that municipalities must provide a sufficient number of daycare places.

The 2003 Daycare Agreement caused a large-scale expansion of daycare facilities. Private kindergarten providers accounted for approximately two out of three new daycare places. Today, approximately 50% of all children in daycare attend a private kindergarten.

Daycare is primarily funded through a combination of public subsidies and parental fees. The funding model is meant to ensure access to daycare for all children. The funding structure varies between municipal and private daycare centres, but the main principles are as follows:

- *Public subsidies.* The national government provides block grants to municipalities, which then fund daycare centres. Municipalities cover a significant share of the operating costs of municipal daycare centres, and pay private daycare centres a subsidy which is roughly equal to that on a per-child basis.
- *Parental fees.* Parents pay a monthly fee up to maximum set by the national government, which has been lowered considerably over the past three years. Currently the maximum monthly fee is NOK 2,000 (€168) for the first child and NOK 3,400 (€285) for the second or third child. In less central municipalities the maximum monthly fee is NOK 1,500 (€126) and NOK 2,550 (€214) respectively. In some municipalities in northern Norway daycare is not subject to parental fees. Income-based rebates and a free basic scheme are available for low-income families. Specifically, if

the maximum fee is higher than 6% of the total income of the family, parental fees are reduced, while pre-school children in low-income families have the right to 20 hours of free daycare per week.

Less conventional types of childcare provision also exist. A “family kindergarten” with only a few children may take place in a private home, subject to regulation. Also, flexible drop-in “open kindergarten” centres, where parents can stay with their children, are often run by municipalities, churches, or voluntary organizations, aimed for children who are not yet enrolled in full-time daycare. Lastly, some large shopping malls and gyms provide short-term drop-in childcare services, which function similarly to crèche. On the contrary, given universal access to affordable childcare, Norwegian employers rarely provide crèche services.

In addition to kindergartens, working parents in Norway also benefit from the after-school programme (*SFO*), offered by municipalities to students in grades 1-4 (and to those with special needs in grades 1-7). These school-based leisure programmes are available both before and after regular school hours. In 2022, the government introduced a free core time (12 hours a week) in the after-school programme for children in first grade. In 2024, this was expanded to children up to third grade. More than 90% of first and second graders are now attending an after-school programme, while the attendance rate is 63% for third graders and 37% for fourth graders.

Parents also benefit from child health clinics (*Helsestasjoner*), that provide free medical services for children (from birth to school age) and their families. While all child health clinics are staffed by nurses and doctors, many include physiotherapists, and some psychologists. The clinics focus on preventive care, health monitoring, vaccinations, and parenting support. The clinics offer regular check-ups based on a standardized program consisting of 14 consultations. The first consultation is a home visit for newborns. The rest of the consultations take place at the clinic until the child is 4 years old. Some of the scheduled consultations are held in groups, although parents can choose individual appointments instead. The clinics also offer guidance on topics like breastfeeding, nutrition, sleep, and mental health. The service is an important part of Norway’s welfare system and helps ensure equal access to early childhood healthcare.

3.5.2. Childcare provision in Greece³⁴

Recent Eurostat statistics suggest that the share of children below the age of 3 in formal childcare in Greece was 29.6% in 2023. Most of them (17.6% of all children in the relevant age group) attended formal childcare for 30 or more hours a week. The remaining (12.0% of all) did so for 29 or fewer hours a week. Coverage was higher for children aged 3 or above: in Greece 87.0% (49.7% for 30 or more hours a week vs 37.3% for up to 29 hours a week).

Most public daycare centres are owned and run by municipal authorities, while 27 belong to the Public Employment Service (*ΔΥΤΑ*).

Public subsidies to childcare providers, both public and private, are co-financed from European Union resources (since 2008 from the European Social Fund, and since 2022 from Next Generation EU), in the form of a voucher that eligible parents can use in the daycare centre of their choice. The voucher scheme is administered by the Hellenic Society of Local Development and Self-Government (*ΕΕΤΑΑ*), jointly owned by municipal authorities and the national government.

The maximum value of the voucher is €180 per month for toddlers aged two-and-a-half to 4 years, or €237 per month for infants aged six months to two-and-a-half years. The amount is raised by €57 per month for a place in a daycare centre providing meals. The voucher is worth €121 for a place in an after-school centre. Higher amounts (up to €500 per month) are provided for disabled children. The voucher is paid for 11 months per year. Eligibility for the maximum value of the voucher is restricted to families with an annual income below €27,000.

In the 2024-2025 school year, 110,000 vouchers were issued for as many daycare places. This number corresponded to 34% of all children below the age of 4 (the mandatory school age). A further 54,000 vouchers concerned children attending after-school programmes at specialised centres open 4 hours a day, while another 9,500 vouchers were set aside for after-school programmes aimed for children with disabilities. The total cost of the voucher scheme was €361 million (0.15% of GDP).

In the 27 daycare centres belonging to the Public Employment Service (*ΔΥΤΤΑ*), enrolment is free of charge. Low-income, single-parent, and larger families are given priority. In 2022, over 300 infants and toddlers were hosted in 7 *ΔΥΤΤΑ* daycare centres in Attica (the province including Athens).

All childcare providers charge parental fees. At municipal daycare centres, parental fees are income related. Discounts for the second (or third) child of the same family also apply. Fee schedules vary by municipal authority. The City of Athens, which runs 68 daycare centres hosting over 4,500 infants and toddlers, in 2020 applied a graduated schedule with fees ranging from zero (for families with annual income below €20,000) to €400 per month (for families with annual income over €300,000). Fees were heavily discounted (by as much as 80%) for a second child of the same family. In contrast, the City of Thessaloniki (Greece's second largest city) charged families with annual income below €15,000 a monthly fee of €64, those with annual income between €15,001 and €27,000 a fee of €80, and families with annual income above €27,000 a fee of €96 per month. Second children of the same family were charged 25% off the standard fee, while third children 50% off.

Parental fees also apply at private daycare centres. There fees tend to be flat with respect to income, although again discounts apply for second (or third) children of the same family. Fees are higher than in municipal daycare centres, and may vary considerably between providers. For illustration, a place in a decent private daycare centre in Athens may cost well over €600 per month, while in Thessaloniki it will cost around €500 per month, i.e. in both cases significantly above the maximum voucher rate of €294 per month.

The quality of childcare provided tends to be uneven. Regulation of private and municipal daycare centres by the national government tends to focus on health and safety standards, rather than on the content of early childhood education and care. A concerted attempt to address this, initiated by the *diaNEOsis* think-tank, led by a Yale economist with considerable international experience (Meghir et al. 2021), caught the attention of ministers. The “Kypseli” curriculum the study proposed was formally endorsed by government, and subsequently found its way to the statute book. Nonetheless, its implementation has stalled ever since, and amendments are currently under consideration.

In addition to formal childcare, a “neighbourhood nanny” scheme was launched in 2023, paying families the sum of €500 per month (€300 if unemployed or in part-time work) with which to purchase informal childcare from a certified carer. In 2025, about 950 families participated in the scheme.

Lastly, crèche services are also known to be provided by certain larger firms in the workplace. A recent scheme provides public subsidies to firms wishing to introduce such services, with funding from Next Generation EU. The subsidies cover the wage costs of two carers for two years.

3.6. Child benefits

Economic theory predicts that child benefits provided to working and non-working mothers alike “would only involve a positive income effect, shifting up the entire budget constraint and reducing unambiguously the labor supply of mothers” relative to a counterfactual of no public cash transfers to families with children (Boeri & van Ours 2021, p. 185).

Still, child benefits are supported by three sets of arguments:

- vertical redistribution (poverty relief), with its implications for child development, in terms of the benefits of preventing scarring effects and interrupting the intergenerational transmission of poverty³⁵; and
- horizontal redistribution (from childless taxpayers to families with children), in recognition to the fact that raising a child is a costly activity involving positive externalities.

3.6.1. Child benefits in Norway

A universal child benefit (*Barnetrygd*) was introduced in Norway in 1946. The benefit is universal, tax-free, paid for all children below the age of 18, financed out of taxation. The benefit rate is currently 1,766 NOK (€148) per month.

Single parents receive a supplement worth 2,516 NOK (€211) per month in addition to the standard rate. Parents sharing custody can apply for shared extended child benefit (standard rate + supplement for single parents).

In addition to that, single parents responsible for at least 60% of the daily care for a child below the age of 8 may be eligible to transition benefit (*Overgangsstønad*). To qualify, single parents must work or study at least 50% of the time, or be a registered jobseeker. The benefit is paid for a period of up to 3 years, at a maximum monthly rate of 23,255 NOK (€1,950) before tax. Those earning more than 5,168 NOK (€433) per month before tax have their transition benefit reduced at a rate of 45% before that threshold. Transition benefit is fully withdrawn if recipients earn more than 56,833 NOK (€4,766) per month.

Single parents with a child aged below 3 may also be eligible for a toddler supplement in addition to the extended child benefit. Those earning below 5,168 NOK (€433) per month before tax, in receipt of full transition benefit, are eligible for toddler supplement at 969 NOK (€81) per month.

Furthermore, taxpayers living with a child aged below 11 are also entitled to tax relief on child-related expenses. The maximum level of deductible expenses is currently 25,000 NOK (€2,096) for one child, and 15,000 NOK (€1,258) for each additional child. The actual tax benefit parents receive depends on the amount of expenses and on their income level. In 2023, the child-related tax benefit was estimated to reach up to 5,500 NOK (€461) for one child, and up to 3,330 NOK (€280) for each additional child.

In addition to child benefit, Norway has had a cash-for-care benefit for young children since 1988. The cash-for-care benefit was introduced to compensate parents who did not enrol their child or children in publicly funded daycare, with the rate set equal to the public subsidy to daycare centres. The benefit is intended to make it easier for families to spend more time caring for young children.

Initially, the scheme was introduced for one-year-olds, but in 1999, it was expanded to include two-year-olds. In 2012, the cash-for-care benefit for two-year-olds was discontinued³⁶. Today the benefit provides financial support to parents with children aged between 13 and 19 months without a full-time place in daycare. If the child has a part-time place in daycare, the cash-for-care benefit is reduced accordingly to 20%, 40%, 60% or 80% of the full rate of benefit. In February 2025, the full rate was set at 7,500 NOK (€629) per month. Official data show that the number of cash-for-care benefit recipients has declined, from over 100,000 in 2006 to below 30,000 in 2023.

Unlike other social benefits for families with children, the cash-for-care benefit is politically contested. The Conservative Party, the Labour Party, the Liberal Party, the Socialist Left Party, and the Red Party are all opposed. Several of these parties have included the discontinuation of the cash-for-care benefit in their programmes. The main political actor supporting the scheme is Christian Democratic Party, which helped introduce the cash-for-care benefit in 1998.

In addition to the benefits mentioned, there are benefits that parents may apply for under specific circumstances, for instance means-tested social assistance and housing allowance. There is also a child supplement in schemes such as disability pension, unemployment benefits, qualification benefits, and work assessment allowance.

3.6.2. Child benefits in Greece³⁷

The consolidation of child benefits in Greece is relatively recent: it occurred in last decade, during the country's sovereign debt crisis. Prior to that, income support had been generous for two types of families: those with three or more children, and those of workers in public utilities, banks, and the civil service. In contrast, most children received little or no benefit, even when poor.

In 2013, most family allowances and tax relief for dependent children were replaced by a "unified" (i.e., non-categorical) child benefit, payable on an income-tested basis. Its introduction brought public assistance within the reach of hundreds of thousands of poor families that had been ineligible for income support under the previous system. The number of child benefit recipients as a share of all children in the relevant age group is estimated at 67%.

The child benefit is available to families with at least one child up to the age of 18 (23 if in higher education, or disabled), on an income-tested basis. The benefit amount varies with family income and number of children. The full rate of child benefit for families with two children is €140 per month, reserved for those with annual income below €12,000. The benefit rate is reduced to €84 per month for families with two children with an annual income between €12,000 and €20,000, and to €56 per month for those with an annual income between €20,000 and €30,000. Child benefit is fully withdrawn above that level.

Furthermore, a birth grant is available to most families. An income test applies, excluding families with an annual income of €70,000 (for a couple with one child), €80,000 (for a couple with two children), €90,000 (for a couple with three children) and so on. The birth grant is paid as a lump sum in two equal instalments. In 2024, the benefit rate was set at €2,400 for the first child, €2,700 for the second child, €3,000 for the third child, and €3,500 for the fourth and each additional child.

In addition to child benefit and birth grant, low-income families with children may also be eligible for guaranteed minimum income benefit and for means-tested housing benefit. Moreover, supplements for dependent family members (10% of the basic amount) are available for unemployment insurance benefit recipients.

3.7. Interaction of cultural norms with institutional arrangements

Cultural norms and institutional arrangements interact in complex ways. On the one hand, clearly governments in a democracy can ill afford to antagonise the beliefs of large parts of the electorate, as ruling parties seek re-election. On the other hand, societal beliefs are not cast in stone: public opinion evolves over time, and public policy often plays a key role in this.

The findings of the study by Kleven, Landais, Posch, Steinhauer & Zweimüller (2024) cited above points to the surprising resistance of preferences and norms in favour of maternal care, in spite of very large increases of publicly funded formal childcare in Austria.

On the other hand, expansions in childcare provision have in many other cases shifted cultural norms. As the author of a recent book on the politics of care in Nordic countries (Ellingsæter, 2024) put it: “Government policies are normative. They shape people’s attitudes.” Her observation is in line with the findings of a recent study that greater availability of affordable childcare across countries tended to correlate with more permissive cultural norms about mothers relying on childcare in order to continue to work, rather than giving up work in order to look after their babies full-time (Pavolini and Van Lancker, 2018). As discussed earlier, evidence from Norway bears this out: the *expansion of childcare in the 2000s led to a significant rise in mothers’ employment* (Andresen & Havnes 2018).

4. Conclusions and policy recommendations

This paper aims to contribute to research on the motherhood penalty, comparing Greece (where female employment is low, and this penalty is significant) with Norway (where female employment is high, and the motherhood penalty is virtually non-existent). We find that in Norway traditional gender norms enjoy less support by public opinion, while parental leave, flexible working time, and childcare provision entitlements are stronger (and gender-neutral). Still, significant progress has recently been made in Greece, both in terms of the acceptance of gender inequality in work and care, and in terms of the strength of work-life balance policies. The trajectory of such policies and the evolution of cultural norms in Norway hold important lessons for Greece.

Policy is highly context specific. It is influenced by historical legacy, by the social attitudes and political beliefs of the age. It is subject to path-dependency, though interspersed with path-breaking moments. It relies on administrative capacity, and operates in symbiosis with cultural norms, in turn shaped by policy. For these and other reasons, policy transfer from one country to the other may not always be successful³⁸.

Nonetheless, there are many instances of policy learning across countries, even though the process can be lengthy, and it is not always clear how the learning actually takes place. Also, policy ‘contagion’ tends to be easier when countries are more similar to begin with (as is the case with Nordic countries), when policy makers actively seek to learn from one another, and when there are institutions in place that positively facilitate policy learning (such as those developed over the years to facilitate the spread of “best practices” in the EU). But policy learning can be effective even when the countries concerned are at the antipodes of a continent, as is the case with Greece and Norway (Bråthen & Fløtten 2016).

As our analysis makes clear, parents in Norway live and work in an environment which is a lot more supportive of their decision to bring up a child without sacrificing their career aspirations. In Norway, laws and collective agreements oblige

employers to facilitate the needs of employees with children. A more favourable institutional framework is likely to have shaped employers' attitudes and to have fostered greater respect for working parents. Moreover, compared to Greece, in Norway paternal leave is longer and better paid, the father quota is significant and non-transferrable, child allowances and other social benefits are more generous, and childcare provisions more plentiful. Not coincidentally, the motherhood penalty is much lower in Norway than in Greece.

Still, a call to copy Norwegian policies and simply paste them into a Greek context would be unlikely to impress policy makers. The real challenge is to think of policies that are inspired by the Norwegian case, advance the cause of raising female employment and helping parents in Greece juggle family and work commitments, and yet lie within (or just beyond) the reach of policy makers in the country - in terms of the financial, political, and administrative resources they require.

A better understanding of the emergence of family-friendly work-life *balance* policies in Norway is essential to this task. Firstly, the policy commitment to helping workers balance work and family life has evolved gradually over several decades. Secondly, this has required broad cooperation across political parties, and between political actors and the social partners, achieving a high degree of cross-party consensus on policy goals. Thirdly, work-life policies have been developed within established institutions, which promote policy learning³⁹.

It is in this spirit that we present a short list of recommendations for policies *aiming to raise female employment and reduce motherhood penalties in Greece*. Our *recommendations* are inspired by an understanding of the gradual emergence of family-friendly work-life policies in Norway, and are informed by our awareness of the financial, political, and administrative constraints facing policy makers in Greece.

The recommendations concern two policy areas: parental leave (broadly defined to include carer's leave) and provision of high-quality affordable childcare. Improving income support for families with children, although possibly desirable in its own right, is less relevant from the perspective of raising female employment and reducing the motherhood penalty in Greece. In particular, cash-for-care policies would be detrimental to these goals, as they likely reinforce traditional gender roles, lowering female employment further. Lastly, we add two recommendations concerning the context in which policy solutions are worked out. Their aim is to raise the quality of policy, to ensure continuity beyond the term of a government (or a government minister), and to prevent the abandonment of policies before their effects have fully been assessed.

Our policy recommendations:

1. Gradually extend non-transferable paternity leave to 4 months on full earnings for all working fathers, in the public sector and in private firms.
2. Gradually extend maternity leave to 12 months on full earnings for all working mothers, in the public sector and in private firms.
3. For workers in private firms, split the cost of parental leave benefit equally between the Social Insurance Agency (ΕΦΚΑ) and the Public Employment Service (ΔΥΠΙΑ), at 50% of reference earnings each, fully eliminating the employer contribution⁴⁰.
4. To accommodate parents' need for flexibility in combining work and care, allow workers on parental leave to opt for a longer period of leave on reduced pay, if they so wish, in agreement with their employer⁴¹.
5. Gradually expand childcare provision building on the current voucher scheme, committing central government resources to reduce dependency on EU funding, with the aim of making access to affordable high-quality childcare for all a citizen's right, legally enforced⁴².
6. Make childcare affordable by capping parental fees at 10% of family income, and by targeting extra resources to ensure a high take up among low-income families.
7. Improve the quality of childcare provided both publicly and privately by introducing a harmonised curriculum early childhood education and care, building on previous work.
8. Encourage and regulate experimental forms of childcare provision in small groups, building on the experience of "neighbourhood nannies".
9. Involve stakeholders in the design of policies, to ensure successful implementation and broad acceptance of policy goals.
10. Carefully evaluate policy effects as they evolve, to improve outcomes and build consensus.

We invite political and social actors in Greece to consider our recommendations, and the media to bring them to the attention of citizens. Expanding and improving work-life balance policies would not be costless in the short term, yet hold the promise of significant medium- and long-term benefits for workers, firms, parents, and children in the medium term.

Notes

- 1 Data from EIStat (Labour Force Survey annual time series since 1981).
- 2 Data from Eurostat (Employment and activity by sex and age - annual data).
- 3 Estimates of the gender pay gap rely on data from the 2018 Structure of Earnings Survey, conducted every four years. Data from the 2022 wave had not been released at the time of writing (March 2025).
- 4 To cite a few landmark studies: Anderson et al. (2002), Blau & Kahn (2013), Blau & Kahn (2017), Goldin (2006), Goldin (2014), Goldin (2024), Goldin et al. (2022), Kleven, Landais, Posch, Steinhauer & Zweimüller (2019), Kleven, Landais & Leite-Mariante (2024).
- 5 Note that there are exceptions to the rule: the child penalty is lower in Portugal (15.5%), than in Iceland (19.9%), while it is higher in Finland (42.6%) than anywhere in South Europe. See Kleven, Landais & Leite-Mariante (2024, pp. 55-57).
- 6 The notion that women specialise in (unpaid) care work, and men in (paid) market work, was first formulated by Becker (1985) in his theory of “the sexual division of labor”. Note that, analogously to David Ricardo’s classical theory, for women to have a comparative advantage in housework they do not have to be more efficient at it than men: the theory holds if, relative to men, women are less inefficient at housework than they are at market work. Needless to add, there is very little evidence in support of either of these assertions.
- 7 Special Eurobarometer 545: Gender stereotypes (fieldwork: January-February 2024).
- 8 Special Eurobarometer 545, question QD4.1.
- 9 Special Eurobarometer 428: Gender equality (fieldwork: November-December 2014).
- 10 Special Eurobarometer 545, question QD5.1.
- 11 Special Eurobarometer 545, question QD4.4.
- 12 Special Eurobarometer 326: Gender equality (fieldwork: September-October 2009).
- 13 Men aged 55+ also had the same agreement rate (29%) as men aged 25-39. See Special Eurobarometer 545 Country factsheet: Greece.
- 14 Special Eurobarometer 545, question QD4.2.
- 15 Special Eurobarometer 545, question QD4.4.
- 16 EVS/WVS (2022) European Values Study and World Values Survey: Joint EVS/WVS 2017-2022 Dataset. GESIS Data Archive, Cologne. ZA7505. Dataset Version 5.0.0.
- 17 EVS/WVS (2022), question D061.
- 18 EVS/WVS (2022), question C001.
- 19 ESS Round 11: European Social Survey European Research Infrastructure (ESS ERIC) (2024) ESS11 - integrated file, edition 2.0. Norwegian Agency for Shared Services in Education and Research.
- 20 ESS11 (2023/2024), question *eqwrkbg*.
- 21 For a summary of paternity leave entitlements in Europe, and in other advanced economies, see Notre Europe (2022) and OECD (2024) respectively. For a comparative analysis, see Adema et al. (2020).
- 22 Directive (EU) 2019/1158 of the European Parliament and of the Council of 20 June 2019 on work-life balance for parents and carers and repealing Council Directive 2010/18/EU. Official Journal of the European Union L 188/79 of 12 July 2019.
- 23 Council Directive 92/85/EEC of 19 October 1992 on the introduction of measures to encourage improvements in the safety and health at work of pregnant workers and workers who have recently given birth or are breastfeeding.
- 24 Typically, paternity leave entitlements are rather modest at first, but are subsequently made more generous. For instance, in Spain, a non-transferable paternity leave (13 days at full pay), introduced in 2007, was extended to 4 weeks in 2017, 5 weeks in 2018, 8 weeks in 2019, 12 weeks in 2020, and to 16 weeks in 2021 (equal to the duration of maternity leave). See de Quinto et al. (2021).
- 25 Patnaik (2019) estimated that exposure to the policy increased take up by 53 percentage points and increased leave duration by 3 weeks on average.
- 26 Note that the information on all Norwegian policies provided in this paper - on parental leave, flexible working arrangements, carer’s leave, childcare provision, and child benefits - is based on material gathered from official websites (including www.nav.no, www.arbeidstilsynet.no, www.regjeringen.no, www.pbl.no, www.lovdatab.no, www.ssb.no, www.skatteetaten.no, and www.udir.no).

- 27 If the father or co-parent is unable to take care of the child due to a certified medical condition, or has not earned enough or worked long enough to be eligible for parental benefit, or is unemployed or a full-time student, or has declined to take parental leave, is absent or unknown, or the parents are separated shortly before or right after birth, and the child lives with the mother.
- 28 In neighbouring Sweden, men's use of gender-neutral parental leave rose from 6% in the mid-1980s to 25% in the mid-2010s, while men's share of care leave fluctuated between 32% and 40% since its introduction (Boye et al. 2015).
- 29 The National Insurance basic amount (*Grunnbeløpet*) was set at 124,028 NOK (€10,400) on 1 May 2024.
- 30 Currently, 744,168 NOK (€62,400).
- 31 For recent reviews of the economic literature, see Olivetti & Petrongolo (2017), and Kleven, Landais, Posch, Steinhauer & Zweimüller (2024).
- 32 For instance, those reviewed in Kleven, Landais, Posch, Steinhauer & Zweimüller (2024).
- 33 For a review of the impact of the iconic Perry Preschool Project on the children and siblings of the original participants in the US in the 1960s, see Heckman & Karapakula (2019). For a review of the types of childcare that confer the greatest benefits, see Vandenbroeck (2020). For a review of the effects of early childhood education and care on child development, see Duncan et al. (2023). See also Foster (2002).
- 34 This section draws on EETAA (2024) and Vatikiotis (2022).
- 35 For a recent analysis of the effects on child poverty and child development of the 2021 expansion of the Child Tax Credit in the US (in a comparative perspective), see Koebel & Stabile (2024).
- 36 Meier & Rablen (2023) have suggested that as the share of modern double-earner families in all families rises, political support for public transfers targeted to traditional single-earner families may evolve non-monotonically. As a result, support for cash-for-care policies may rise at first (as the share of traditional families goes from high to intermediate), only to fall at a later stage (as the share of traditional families goes from intermediate to low).
- 37 This section draws on Matsaganis (2020).
- 38 For a recent review of policy transfer in the area of family policies, see White (2020). For a broader discussion of policy transfer, see Legrand & Stone (2022), and Evans (2019).
- 39 For the politics and history of work-life policies promoting gender equality in Norway and other Nordic countries, see Bråthen & Fløtten (2016) and Dølvik et al. (2015).
- 40 The purpose here would be to remove the disincentive to hiring young women by drastically reducing the cost of parental leave to employers, currently rather significant in the micro firms (with 0-9 employees) where 49% of all private sector workers in the country are employed.
- 41 For instance, allow working fathers to opt for 8 months of paternity leave on half earnings instead of 4 months on full earnings.
- 42 On the role of a legal entitlement to childcare provision across EU member states, see Corti et al. (2022).

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The Return of (Neo-) Protectionism: US Tariffs and Beyond

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Summary

- The imposition of higher tariffs by President Trump or the threat to do so, while seemingly contradicting economic orthodoxy is not out of sync with the President's view of the world.
- Tariffs are used as bargaining tool to force US trading partners into bilateral negotiations.
- A so-called "Mar-a-Lago Accord", in the spirit of the 1985 Plaza Accord, could, in Trump's view, help in responding to the key challenges of the American economy.
- According to the existing literature, the potential effects of higher US tariffs on the EU are going to be small to medium (0.10%-0.66%).
- Macroeconomic projections by the IMF, which combine the effects of higher tariffs with uncertainty and tighter financial conditions, place the medium-term effect for the EU at 1.75% of GDP.
- The effect of US trade policy uncertainty (TPU) on EU GDP with a two-standard deviation increase of TPU will be up to a drop of EU GDP by 0.73% after three years (the cumulative loss reaching 6.49%).

Introduction

When President Trump announced on February 1 the imposition of twenty-five per cent tariffs on Mexican and most Canadian imports and ten per cent on goods from China, demanding they curb the flow of fentanyl and illegal immigrants into the United States (US), he may have not realized the cataclysmic effect of his decisions. This does not suggest that the level of the newly imposed tariffs was so high that the global economy could not absorb the blow. After all, what has followed is a continuous oscillation between announcements of new tariffs and their suspension or freezing due to ongoing negotiations. This situation has created enormous uncertainty, which is still the case even after the end of the 90-day suspension period, announced by the American administration on 9 April. In a very depictive [cartoon](#) published in a Canadian newspaper, President Trump is caricatured as Forest Gump, the central character of the famous American film, stating that "[t]ariff threats are like a box of chocolates. Your trading partners never know what they are going to get"!

The shock of Trump's policy is not solely associated with the level or the impact of the announced -and yet to be implemented, in most cases- tariffs *per se*. Rather, it is linked with the systemic ripples caused by a potential global paradigm shift regarding trade policy and the liberal economic order. The evangelized (neo-)protectionist turn may generate the demise of the post-World War II economic order, built on the twin assumptions of economic liberalism and globalization. This approach, that originated from and was epitomized in the post-war policies of the Anglo-Saxon world, stemmed from the insights of the interwar period and the lack of cooperation in mitigating the effects of the 1929 crash. Among other reasons, the isolationist approach to the first major crisis of the capitalist system accentuated its devastating impact, bringing forward societal and political polarization and a global conflict in the form of a world war. For eighty years the - later coined and very often misunderstood - Washington consensus that enshrined trade liberalization, privatization and finance liberalization became the guiding principle of the international economic order. It served well the interests of the American economy, during the period it was the most productive and competitive one, capitalizing on its technological edge as well as the low starting point of other competitors in the early post-war years. However, the US economic hegemony already started to crumble in the 1970s, with further economic deterioration in the following decades. President Trump claims he can redress this fall by changing the rules of the game that no longer serve American economic interests - at least those of his political and economic clientele.

Trump is not navigating in uncharted waters without a map; he has a central plan (the so called 'Mar-a-Lago Accord'), which envisions a new blueprint for global trade and monetary relations. According to this roadmap, which will be discussed in the next section, and setting aside its numerous weaknesses, tariffs are strategic tools to pursue greater burden sharing among US economic and political partners. However, there is no free lunch in life: the cost of establishing this new blueprint is difficult to estimate and it is hard to predict whether we are in the middle of a systemic and radical overhaul of the previous *status quo* or we are experiencing a rough but short-lived turmoil.

In the following section, we elaborate in brief on the key features of the Mar-a-Lago Accord and the accompanying criticism. The central question is whether the new blueprint is realistic and feasible or whether it is a means to exercise pressure on recalcitrant partners and bring them in line with US strategic interests, setting appropriately the pawns in the global chessboard in view of a greater endgame involving China. Next, we offer a short account of the measures taken (a longer one can be found in the Annex). The point in this section is to identify the conditioning factors that underpin the

(lack of) American consistency and persistence in the implementation of the invoked tariffs, which increases the surrounding uncertainty and its negative economic effects. Simply put, when the US unilateral course of action met strong resistance as well as readiness and willingness to retaliate, a U-turn occurred, measures were mostly held back and (yet inconclusive) negotiations began. Thirdly, we compare the findings of different studies regarding the economic impact of the imposed tariffs on Europe and Greece. This is necessary to highlight the great uncertainty caused by this situation, since all studies are based on different scenarios and hypotheses. Our estimates of the uncertainty effect show a non-negligible impact, which, in conjunction with the tariffs and broader geoeconomic dynamics, may have a substantial effect on global economy, including the European and Greek one. Our point is that at the end of the day, the economic effects of this uncertainty may cause higher economic damage than the tariffs *per se*.

The Mar-A-Lago Accord: A Roadmap for American Protectionism

The central figures behind the Mar-A-Lago Accord are Stephen Miran, who is currently chair of the Council of Economic Advisers of President Trump, and Scott Bessent, currently Treasury Secretary in the Trump administration. Taking off from different starting points, their thought converges in that the US has been providing post-WWII two major public goods: first, security, especially to Europe through NATO and to the rest of the world through military presence across the globe; and second, financial stability, through the role of the dollar as an anchor of the system and a 'safe haven'. Their claim is that for these two public goods the US has been paying a huge toll. They call for a transformation of the global economic system to address what they consider as a fundamental injustice.

Scott Bessent emphasizes the links between trade and security, criticizing globalization for accentuating structural imbalances in the global economy. For him, trade is inexorably linked to security and the liberal economic order has benefited more US adversaries rather than strengthen the United States. While the US has been investing heavily in defense and has played consistently the role of defender of the western values and beacon of democracy in the world order, Europe and other allies have taken advantage of US, free riding on it and enhancing their own prosperity at the expense of the American one. Hence, the call for more burden-sharing in terms of security and defense. At the same time, free trade and globalization have empowered systemic rivalries of the US, first and foremost China. This has created a strategic dependence, with supply chains and production lines - especially in critical sectors like semiconductors, robotics and advanced manufacturing - clearly out of American control, increasing the economic and security vulnerability of the US. For Bessent, a segmented global economy, with countries aligned with US strategic interests receiving in exchange a more favorable economic treatment, serves better the American interests and should succeed the current globalized system.

In a [paper](#) written in November 2024, before taking on his post in Trump's administration, Miran also adopts the close link between security and trade and advocates the transformation of the global economic framework, which no longer suits American interests. In his view, the [global role of the dollar](#) as a pillar of stability increases the foreign demand for dollar-denominated assets, like the Treasury bonds, skyrocketing the public debt of the US as well as bringing about the overvaluation of the American currency. As a result of this overvaluation, the American economy has lost in an artificial way - i.e. not in real economic terms - its competitiveness, and the American industrial products cannot compete in the international markets because they are expensive. In turn, this undermines exports, increases imports, further deteriorates the US trade balance in goods, and affects negatively the American manufacturing base leading to higher unemployment rates.

For both Bessent and Miran, tariffs have an instrumental use. They are a means for a broader end. In the short run, they will help curb the budget deficit by increasing public revenues and create some fiscal space for other policies, especially tax cuts. At the same time, they will lead to an imports decrease, improving the country's trade balance. Furthermore, tariffs serve as leverage in negotiations with third countries in two respects: first, in the short run, US trade partners are expected to yield and adjust accordingly their policies in exchange for access to the American market. After all, in the current conflictual geoeconomic and geopolitical environment, the American side should clearly advocate trade and security alignment. Countries benefiting from the American security guarantees are expected to adjust their economic and trade ties in accordance with the overarching US priorities. Second, in the long run, tariffs will lead unwilling third parties to the negotiating table to discuss a new international currency agreement, along the lines of the 1985 Plaza Accord. The idea behind it is that other countries will consent to the appreciation of their own currencies to address the dollar's overvaluation and will also agree to the restructuring of the American public debt. In that way, there will be a

better burden sharing within the international monetary system and the costs will be redistributed among the key players instead of being born exclusively by the US. This will benefit the US economy, bring about industrial revival, especially in the critical sectors mentioned above, and contribute to the curbing of unemployment.

These views have been music to the ears of President Donald Trump, a long-held proponent of tariffs and a strong believer that protectionism serves better the American economic interests. Already in the 1980s, still as a real estate developer playing with the idea of engaging in politics, Trump criticized Japan for unfair trade practices and for free riding on the US security guarantees. In a CNN interview with Larry King, in 1987, he urged for a more balanced trade relationship with "...countries that are ripping off the United States", an identical statement with those in his terms in office, simply replacing Japan with China, Europe and other US trade partners. Furthermore, the approach envisaged in the Mar-a-Lago Accord squares well with his preferred case-by-case, bilateral interactions with third countries, in which the American side has more leverage, as opposed to multilateral arrangements, international institutions and global fora, like the G7 or the World Trade Organization (WTO). The threat of tariffs or financial restrictions is believed to bring foreign governments to the negotiating table and reverse the negative outcomes of poorly negotiated past trade agreements.

Setting aside the [criticism](#) on the core components of the Mar-a-Lago Accord, that ranges from the destabilization of the global economic system to the questioning of its economic and societal benefits for the US and the upsetting of historical ties with traditional friends and allies, its feasibility is also under question.¹ The precedent of the 1985 Plaza Accord is coined as an illustrative example of the envisaged economic gains that may result from such a change. However, the Plaza Accord was a voluntary arrangement between the US and the major economies of that time to have their Central Banks intervene and adjust the relative value of their national currencies. Moreover, the effects on such interventions on exchange rates are found to be small and very short-lived (Fratzscher, 2009). The emphasis lies on the shared understanding and strategic purpose of all countries involved in the Plaza Accord to absorb pressures and bring forward consensually a monetary realignment. This is obviously not the case in the current situation, with waning trust that decreases significantly the feasibility of such a prospect.

Furthermore, on the related front of accumulated debt, even if the political will existed in any discussion about restructuring, the American public debt is no longer primarily state-controlled and in the hands of central banks, as it was in the 1980s. Thus, any such venture should involve the financial markets and a series of private actors, including all kinds of funds and investors, which are much more volatile and difficult to control. At the same time, trade patterns and flows have changed dramatically in the past forty years since the Plaza Accord. As opposed to the understanding of the major US trade partners in the 1980s, the Trump administration is now facing the far from constructive response by China and the EU to a large extent. The aggressive and often condescending approach has alienated traditional partners, including Canada and European countries, that are forging counter- coalitions to collectively address the bullying experienced. Hence the instrumental use of tariffs as a bargaining chip in prospective negotiations does not seem to have worked so far as planned with very few concessions granted and most tariffs announced in the limbo of perpetual negotiations.

The Evolution of US Tariff Policy

Prelude to "Liberation Day"

In January 2025, President Donald Trump declared that tariffs were, in his view, "[...the most beautiful word in the dictionary](#)". A stance that had already been clearly demonstrated during his first term in office, when he broke with the prevailing U.S. economic [orthodoxy](#) by imposing tariffs on hundreds of billions of dollars' worth of imported goods in the name of national security and U.S. economic competitiveness. In the inaugural address of his second term, Trump renewed his commitment to "tariff and tax foreign countries to enrich our [citizens](#)". He also issued a presidential memorandum, laying the rhetorical ground for an "America First Trade Policy".

On [February 1](#), the U.S. administration turned its ire towards its North American neighbors (Canada and Mexico) and China, on the grounds that they were failing to adequately address transnational drug challenges, migration concerns and, in China's case, the fentanyl crisis. This triggered a series of tit-for-tat escalations between the United States and China over the following month, as both countries imposed successive rounds of retaliatory tariffs, further intensifying trade tensions and disrupting global supply chains. As for Mexico and Canada, the administration implemented a 30-day

pause on tariff measures following both countries' commitments to cooperate on drug control and migration management, and on March 6, President Trump further delayed tariffs on goods covered under the USMCA framework.

The global tariff escalation reignited on [March 12](#) when the Trump administration reimposed a 25% tariff on steel and aluminium imports, including longstanding allies such as Canada, Mexico, the EU, Australia, and South Korea. Two weeks later, on [March 26](#), a parallel 25% tariff was announced on imported automobiles. In response, the European Union launched its wave of retaliatory measures, targeting a wide range of American exports, from agricultural goods and alcoholic beverages to clothing.

"Liberation Day"

The narrative of April 2 as "Liberation Day", with its launch unfolding across social media platforms, was intensified with a [post](#) on President Trump's Truth Social account saying, "April 2nd is Liberation Day in America!!! For DECADES we have been ripped off and abused by every nation in the World, both friend and foe. Now it is finally time for the good Ol' USA to get some of that MONEY and RESPECT, BACK. GOD BLESS AMERICA!!!"

On April 2, beneath the spring blossoms of the White House Rose Garden and alongside an executive order, President Trump unveiled a large three-column board listing 25 countries. The board displayed the tariffs charged to the USA - including currency manipulation and trade barriers - and presented the U.S. "[Discounted Reciprocal Tariffs](#)". President Trump announced the U.S. will impose a minimum baseline of 10% tariffs on goods imported from all foreign countries, as well as higher [reciprocal tariffs](#) on nations that impose tariffs on U.S. exports. However, he mentioned that reciprocal tariffs will amount to roughly half the tariff rate those countries impose on U.S. exports. Among the countries targeted, China faced a rate of 34% and the EU 20%, while Vietnam was hit with the highest tariff, 46%, reflecting the administration's attempt to match what it viewed as long-standing trade asymmetries.

The rationale behind "Liberation Day" rests on a twofold [narrative](#). First, the administration framed tariffs as a necessary corrective to decades of openness that had been met with asymmetric foreign tariffs and trade barriers, and second, that tariffs are ultimately a revenue-raising mechanism to help finance the sweeping tax cuts the administration has just introduced with the Big Beautiful Bill. Regardless of the administration's underlying motives, the announcement triggered swift reactions abroad, with key trade partners condemning it as a provocative escalation and a potential start of a trade war.

Tariff escalation between the US and China

The contentious U.S.-China trade relationship began during President Trump's first term and has since snowballed into a broader escalation of economic and geopolitical tensions. Since early 2025, the two countries have engaged in escalating [rounds](#) of reciprocal tariffs, significantly impacting both bilateral trade and global supply chains. More specifically, April 9 intensified the trade conflict to an unprecedented level. Within the span of a single day, the U.S. imposed an additional 84% tariff on all Chinese imports (raising the cumulative rate to 104%) only to escalate it further to at least 145%, following China's swift retaliation. Simultaneously, the US announced a 90-day pause on "reciprocal" tariffs for all nations except for China, further isolating Beijing. Two days later, on April 11, China responded with an increase of its retaliatory tariffs to 125%, while the Trump administration exempted smartphones, computers, and other electronics from the reciprocal tariffs, instead subjecting them to a reduced 20% rate.

On May 12, following a weekend of negotiations in Geneva, the White House and China's Ministry of Commerce (MOFCOM) released a joint statement in which they committed to lowering reciprocal tariffs for an initial 90-day period. The U.S. announced that by May 14, it would temporarily reduce overall tariffs on Chinese imports from 145% to 30%, while China committed to lowering its tariffs on American goods from 125% to 10%. However, during this period, the legal position of the US was significantly undermined when a federal court ruled that key elements of Trump's tariff regime, imposed under the International Emergency Economic Powers Act (IEEPA), exceeded presidential authority, raising critical concerns about executive overreach. These developments underscore the increasingly volatile and legally contested nature of the US-China trade relationship, while legal ambiguity threatens to hinder sustained diplomatic progress and further destabilize global market expectations.

US tariffs on the EU and the European response

On March 12, the United States imposed tariffs of up to 25% on imports of steel, aluminum, and certain products containing steel and aluminum from the EU and other trading partners. In response, the EU adopted a two-step [approach](#). First, the European Commission allowed the suspension of existing 2018 and 2020 countermeasures against the US to lapse on April 1. Second, in response to new US tariffs affecting more than €18 billion EU exports, the Commission prepared a package of new countermeasures on US exports, which could apply to US goods exports worth up to €26 billion, matching the economic scope of the US tariffs. However, after the US announced a 90-day pause on the tariffs on April 10, the EU likewise suspended its countermeasures to facilitate negotiations.

Despite the EU's efforts to pursue smooth and fair negotiations, President Trump, during a rally in Pittsburgh, announced his intention to double tariffs on steel and aluminum imports from 25 to [50%](#). The European Commission expressed strong regret over this unexpected move, stating that such unilateral action undermines ongoing trade negotiations and risks derailing prospects for a bilateral agreement. Brussels also warned that [countermeasures](#) may follow, signaling a potential escalation in transatlantic trade tensions. In a subsequent conversation with Commission president Ursula von der Leyen, Trump initially agreed to postpone his threatened imposition of 50% tariffs until July 9, postponed again his tariff imposition until August 1, and decided to impose a 30% tariff on EU goods, with measures effective from August 1. At the same time, EU officials have indicated that the US court ruling, which casts doubt on the legal basis of the imposed tariffs, has strengthened the Union's negotiating position. In parallel, the European Commission has finalized an expanded package of countermeasures, set to enter into force automatically on or before July 14, in the event that negotiations fail to produce a balanced outcome. This temporary reprieve, however, does little to resolve the deeper structural tensions between the two sides.

US Tariffs and the World's Response

The resurgence of US protectionism has generated calibrated but globally diverse responses, particularly among global economies. In sub-Saharan Africa, the looming expiry of the African Growth and Opportunity Act (AGOA), in September 2025, has heightened concerns, as vulnerable [exporters](#) like Lesotho, Madagascar, and Mauritius face tariff spikes between 40% and 50%, threatening jobs and export earnings. Despite these pressures, African countries have not pursued retaliation. Instead, they are [lobbying](#) for [AGOA's renewal](#) or its transformation into a more strategic US- Africa trade and minerals-access partnership, while working collectively under the auspices of the African Union (AU) to boost regional market diversification. This measured response reflects Africa's limited bargaining leverage and the prioritization of stable, long-term US engagement in the continent.

In Asia and the Middle East, major economies have also adopted strategic, non-confrontational responses under the tariff surge. [ASEAN](#) leaders reached consensus that any bilateral tariff agreements with the US must safeguard collective regional interests and preserve the economic unity of its more than 650 million population. [India](#) has responded to the escalation of U.S. tariffs with a strategic push for a negotiated settlement aimed at protecting its key export sectors. After four days of talks in New Delhi, Indian and U.S. officials reported substantial progress toward an interim trade agreement with several issues still pending. The two sides were expected to finalize the deal by the end of June, ahead of the expiration of President Trump's 90-day suspension on reciprocal tariffs for major trading partners, under which India faces a potential 26% duty. As part of the negotiations, India has requested an exemption from a 50% tariff on steel exports and has pledged to increase purchases of American goods, including energy products like liquefied natural gas, crude oil, coal and defense equipment. The [United Arab Emirates](#) has likewise initiated talks on a Comprehensive Economic Partnership Agreement aimed at rolling back both the 10% universal tariff and the elevated 25%- 50% steel/aluminum duties. These efforts indicate a condescending common global trend of diplomatic engagement and selective bargaining, focusing on minimizing economic fallout while preserving long-term trade relations with the U.S.

What can be deduced from this brief overview is that there are two kinds of response to the imposition of US tariffs. China and the EU have reciprocated swiftly, albeit to a lesser extent, while other countries in Asia and Africa have attempted to appease President Trump in the expectation of a more favorable treatment and a better bilateral deal with the US.



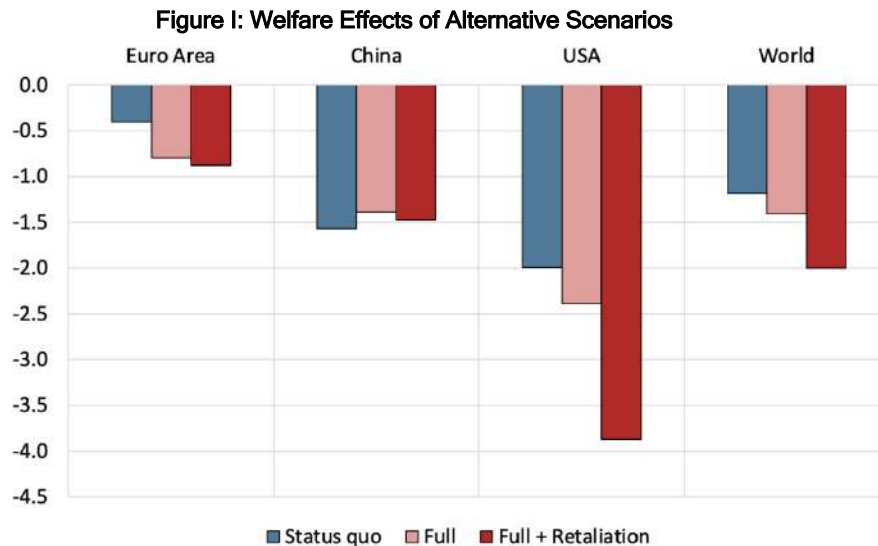
Studying the Effects of U.S. Tariffs on the EU

The witnessed global tariff escalation has called into question the current economic orthodoxy with a great yet unknown effect on the global and European economy. In this section, first, we provide an overview of related existing analyses and second, we estimate the specific effect of uncertainty on the European economy. Our discussion builds on the different scenarios of how the tariff war will play out that have been studied so far. To date, there are six such studies we find more relevant, including those of Bouët *et al.* (2025), Conteduca, Mancini and Borin (2025), da Rocha *et al.* (2025), Du and Shepotylo (2025), Hinz *et al.* (2025), and Tordoir *et al.* (2025). However, the IMF (2025), the European Commission (2025) and the European Central Bank (2025) have also included in their recent projections related analyses, which we also discuss below.

Analysis Based on Different Scenarios

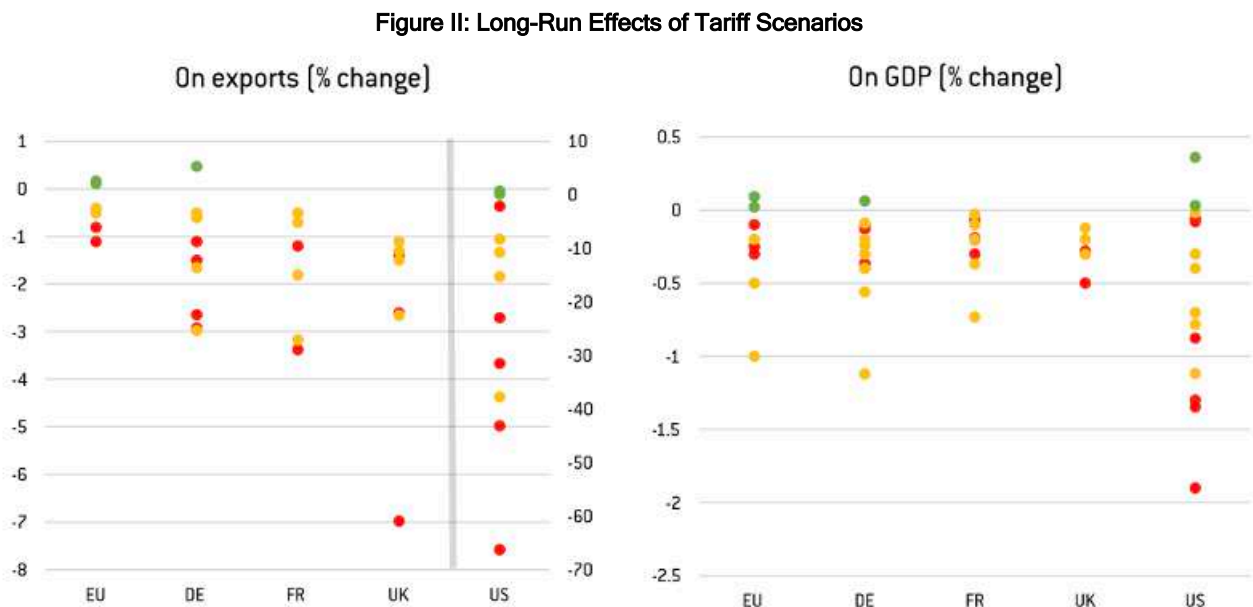
Bouët *et al.* (2025) present results based on simulations with the MIRAGE-Power model and employ six scenarios. In their *central scenario* they find a major reallocation of trade flows, with a collapse in trade between China and the United States. They also find that the US and China seem to be the most affected countries, with GDP losses of 1.3% for both countries, while the reduction in EU GDP is about -0.1%. In one of their scenarios, where the US imposes an extra 25% ad-valorem equivalent of non-tariff measures and its trading partners respond with equal measures,² the drop in EU GDP is found to be about 0.3% with China and the US facing GDP losses equal to 1.3% and 1.9% respectively.

Conteduca, Mancini and Borin (2025) analyze three scenarios using data on global value chains:³ the 'status quo' scenario, which reflects the situation as of 20 April 2025;⁴ the 'full' scenario, which assumes no suspension of the 2 April tariffs, combined with the extension of tariffs to pharmaceuticals and electronics, as already announced;⁵ and 'full + retaliation' scenario which assumes that affected countries retaliate by matching US tariff increases at the sector level. They report changes in welfare (which includes changes in GDP and changes in prices), displayed graphically in Figure 1, and find that even under the full retaliation scenario the reduction in EU welfare is going to be relatively mild, about 0.9%. Instead, under all three scenarios China will witness welfare losses of about 1.5%, with the US witnessing much higher losses between 2% and 3.8% approximately.



Notes for Figure I: The figure reported here is Figure 3 in Conteduca, Mancini and Borin (2025).

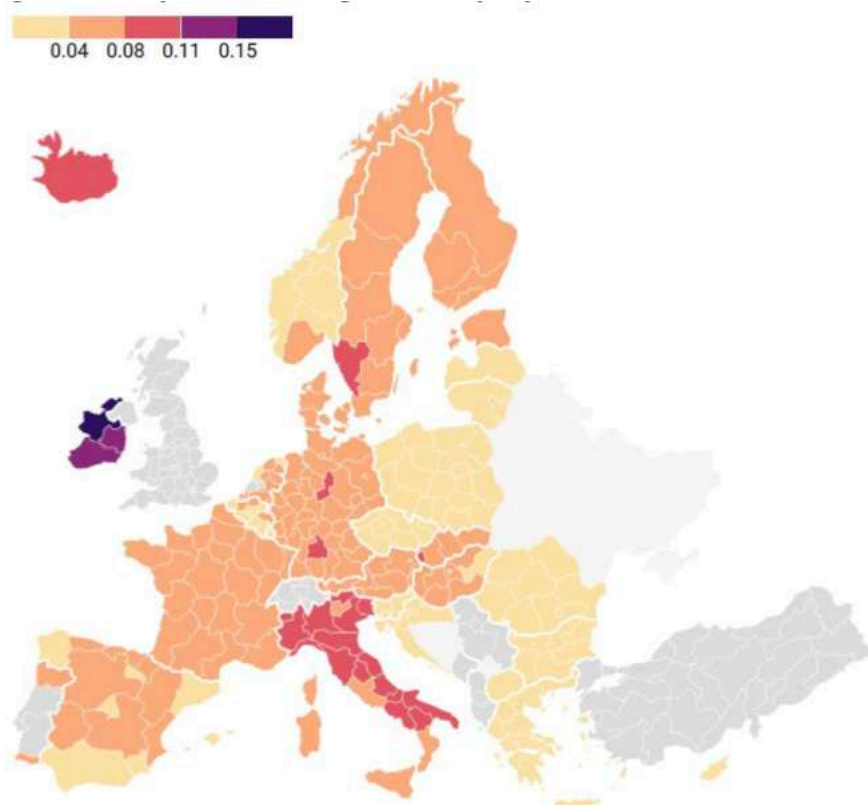
da Rocha *et al.* (2025) in their work summarize findings from five studies which estimate the long-term impacts on the US and Europe of various tariff scenarios - a trade deal, unilateral US tariffs and US tariffs plus retaliation. The tariffs discussed range from 10% to 25% percent for all US trade partners, sometimes excluding Mexico and Canada. Most studies assumed a 60% tariff on China, while retaliation by trading partners was assumed to be in equal measure to the US tariffs. Results displayed in Figure II indicate that in a no-deal scenario, US GDP could fall by 0.7%, while EU GDP by 0.3%, with all scenarios bar one calculating a reduction between zero and 0.5% of GDP for the EU. However, the most crucial finding in Barata da Rocha *et al.* (2025) is the European regional heterogeneity of the employment exposure to US tariffs: the effects are much higher for Ireland, followed by Italy, while the other regions show much less exposure. This is depicted in Figure III.



Notes for Figure II: The figure reported here is Figure 2 in da Rocha et al. (2025).

Du and Shepotylo (2025) also analyze six scenarios of tariff war evolution. In their fourth scenario, where the EU retaliates to US tariffs, they find output losses for EU countries ranging between 0.171% (for Poland) and 1.212% (for Ireland).⁶ In their US global tariff scenario (25% global tariff) they find output losses for EU countries between 0.174% (for Poland) and 1.278% (for Ireland). Finally, in their full global retaliation scenario (25% tariffs+20% extra on China) they find again a reduction in GDP for EU countries that varies between 0.14% (for Poland again) and 1.094% (for Ireland again).⁷

Figure III: Exposure of Regional Employment to Tariffs



Source: Bruegel based on Eurostat structural business statistics (SBS) and the OECD trade in value added database (TiVA). Note: calculated by multiplying for each industry the value added embedded in exports to the US as a share of total value added at the national level by the share of employment in an industry in each region. A higher value indicates a greater vulnerability to US tariffs. Excludes pharmaceutical goods, which are at the time of writing mostly not subject to tariffs.

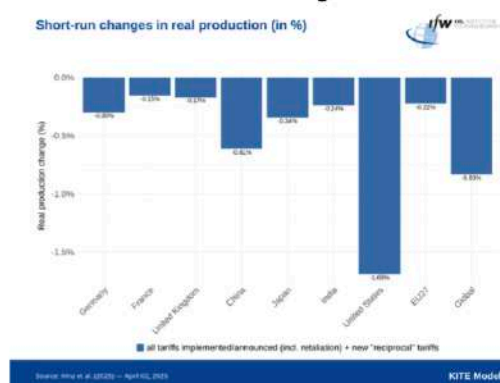
Notes for Figure III: The figure reported here is Figure 3 in da Rocha et al. (2025).

The work by Hinz *et al.* (2025) allows in real time the simulation of the short-run effects of the announced measures. Out of all the simulated results, we have chosen to focus on two cases: the new US tariffs on all trading partners as announced on April 2, 2025, and the implementation of Trump's proposed 50% tariff on EU imports. These are depicted graphically in Figure IV. The estimated reduction of EU GDP in the first instance is found to be 0.22% while in the second instance 0.66% - in all cases the fall in US output is much larger than that of the EU and China.

Tordoir *et al.* (2025) also discussed four scenarios but evaluated only the two of them. The first one included the tariff increases announced early in 2025, plus low reciprocal tariffs that escalate into higher tariffs, but escalations remain contained while in the second US imposes sweeping reciprocal tariffs that include Value-Added Tax (VAT) and non-tariff barriers and the EU responds with a retaliation that conforms with the WTO, estimated at +30% tariffs on US goods. Their third scenario is full trade and financial breakdown (i.e. "Armageddon") and their fourth is based on a coordinated global rebalancing based on a type of the "Mar-a-Lago / Plaza Accord", discussed in the first section. The effects they estimate (see Figure V) are rather small in magnitude for the EU, the US and China - only Mexico is found to be influenced heavily by these tariffs. They find that under the more adverse scenario B, EU GDP will fall by only 0.06%, US GDP will increase by 0.3%, while China will witness GDP losses of about 0.15%.

Figure IV: Short-Run Effects of Different Tariff Policies

A: New US Tariffs on All Trading Partners



B: Proposed 50% Tariffs on EU Imports

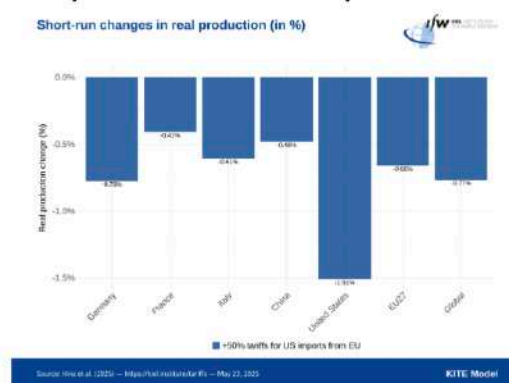
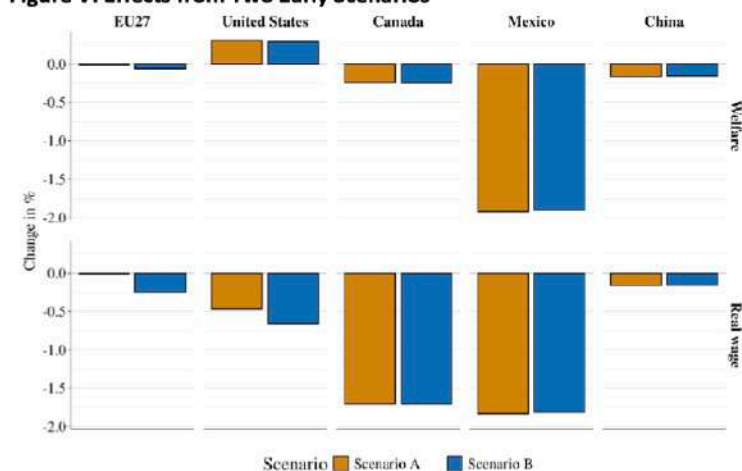


Figure V: Effects from Two Early Scenarios



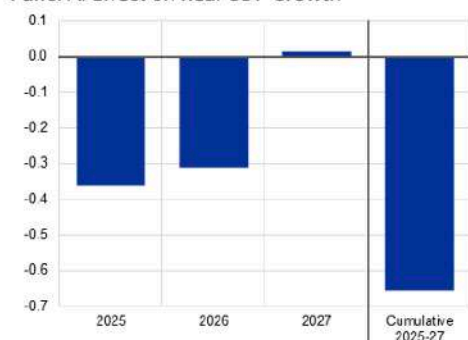
Notes for Figure V: The figure reported here is Figure 8 in Tordo et al. (2025).

Recent Macroeconomic Projections

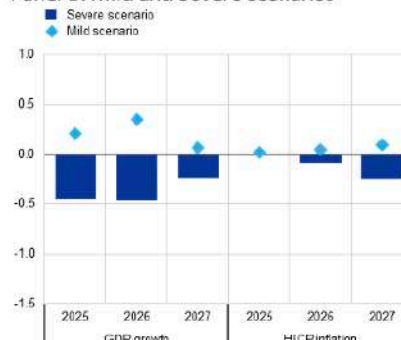
The ECB (2025) in its baseline projections, published in June (2025), assumes that US tariffs on EU goods, which have increased to 10%, will remain in place over the entire projection horizon and finds that they are not going to have a large effect on EU output. When they consider both changes in tariffs and trade policy uncertainty, they estimate the effect on EU growth to be about -0.35% for 2025 and -0.31% for 2026, as summarized in Figure VI. They also discuss two scenarios: the mild one, which assumes the removal of US-EU bilateral (i.e. "zero-for-zero" tariffs) and a rapid reduction in trade policy uncertainty to pre-2018 levels, and the severe one, which includes further increase in US tariffs across the board (in line with the announcement of so-called "reciprocal" tariffs in the United States), symmetric retaliation by the EU and persistently higher trade policy uncertainty. Under the latter scenario, EU growth is projected to be half a percentage point lower relative to the baseline (i.e. about 0.85% lower).

Figure VI: Projections by the ECB

Panel A: Effect on Real GDP Growth



Panel B: Mild and Severe Scenarios

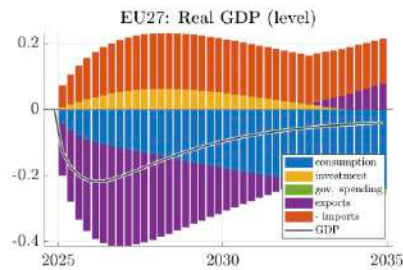


Notes for Figure VI: Results presented in Box 2 of ECB's (2025) June 2025 Macroeconomic Projection

The European Commission (2025) in its baseline projections where unilaterally the US imposes tariffs on its imports, estimates that EU GDP will fall by about 0.23% by 2027 (see Figure VII). They also explore other scenarios in their analysis: one in which there is potential symmetric retaliation from trading partners on imports from the US (“trade war” scenario) and one in which there are additional risk premium shocks on US financial assets and capital. In all cases, the EU GDP falls, but the reduction is modest (always below 0.4%) and temporary, whereas the US GDP decreases by far more (roughly between 1% and 1.8%) with the reduction being more persistent (permanent in nature).⁸

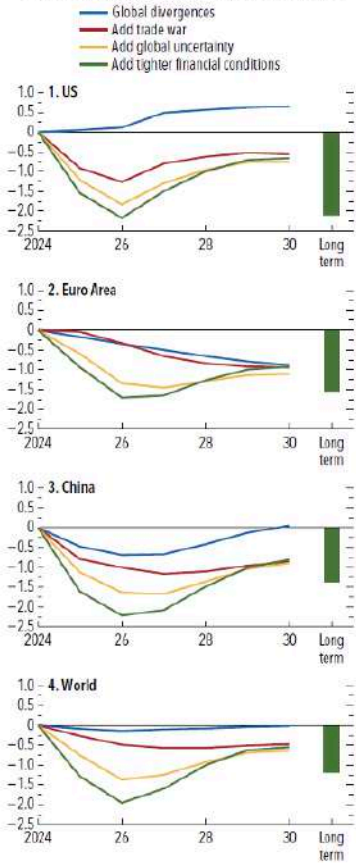
Finally, the IMF (2025) presents a set of scenarios that lead to much richer and interesting results (see Figure VIII). They start with a scenario of global divergences (involving the renewal of the US Tax Cuts and Jobs Act, lower productivity in Europe and weaker domestic demand in China), then add a trade war, an increase in global uncertainty and tighter financial conditions. Their results, displayed in Figure VIII are telling: whereas the effects of a trade war on the EU are rather modest, adding global uncertainty and tighter financial conditions, the fall in EU GDP by 2026 might be as large as 1.75%, with output losses for the US, China and the world economy following suit! Moreover, EU output is expected to fall by almost 1 percentage point by 2030 in the presence of trade war alone, or when all different scenarios play out together - the same being true for the US and China.

Figure VII: European Commission Projections



Notes for Figure VII: This is part of European Commission's (2025) Graph II.1.1: Unilateral US tariffs on imports

Figure VIII: IMF's (2025) Projections



Notes for Figure VII: The figure reported here is Figure 1.1.2 in Box 1.1 in IMF (2025)

A Summary of Findings

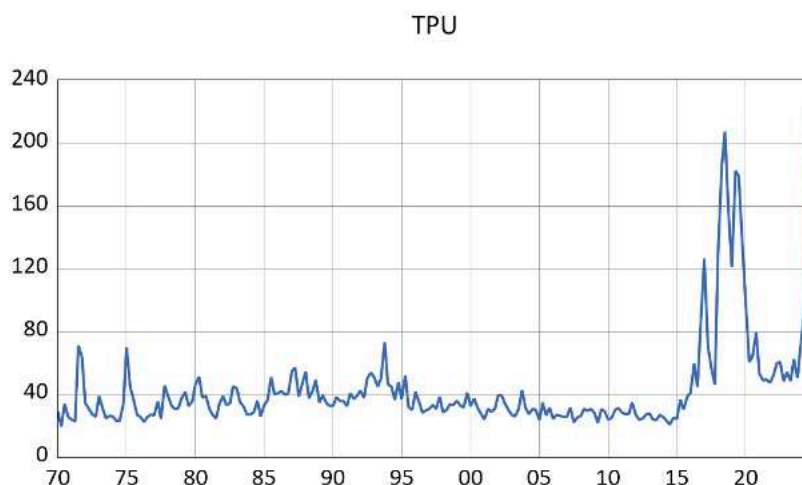
All the scenarios we have examined point to a small or modest effect of the ongoing trade war on EU output. Some estimates based on general equilibrium trade models tend to be very small, about 0.1% (e.g. Tordoir *et al.*, 2025), while others (Conteduca *et al.*, 2025; da Rocha *et al.*, 2025; Du and Shepotylo, 2025) place the estimates at a range between 0.9% and 1% range. Similar evidence, especially those discussed in the projections by the European Commission (2025) and the European Central Bank (2025) place the estimates somewhere in the middle of this range. More thought-provoking are the projections of the IMF (2025). The effect of trade war alone on EU output is estimated to be about 0.5% in 2026. However, when other types of disturbances, like heightened policy uncertainty and tighter financial conditions, are considered, the reduction in EU GDP by 2026 can reach a sizable 1.75%, albeit it is expected to return to a 1% lower level by 2030. As we feel that policy uncertainty, and in particular trade policy uncertainty (TPU) is an important determinant of EU GDP, we turn to this issue in the next section, where we also provide evidence of the effects of TPU in the US on the EU and the global economy.

The Effects of Trade Policy Uncertainty

As mentioned in IMF (2025) and in other studies the uncertainty surrounding trade policy is a major factor resulting in a gloomy global outlook. The reason is that as firms face heightened uncertainty related to their access to markets, their response will be to follow a wait-and-see strategy, reducing investment and purchases.

We set out to estimate a set of SVAR models to gauge the effects of trade policy uncertainty (TPU) on key macroeconomic variables in Europe. Our TPU metric comes from Caldara *et al.* (2020), our macroeconomic variables for the Eurozone come from İpek and Kisacikoğlu (2025) and the Greek GDP was obtained from Eurostat and interpolated backwards using the period-by-period growth rate available in FRED.⁹ We measure US tariffs following Caldara *et al.* (2020) as the ratio of custom duties to goods imports for the US (using data from the BEA). To get a feeling of the size of the shock we use below, notice that during the most recent period ending in 2024Q4, TPU has increased by about four standard deviations.¹⁰ Trying to be modest, in our VARs below we report impulse responses to only two standard deviations.

Figure IX: The Evolution of Trade Policy Uncertainty



Box: Structural VAR Models

Our goal is to study the dynamic effects of trade policy uncertainty (TPU) shocks on key macroeconomic outcomes like the Eurozone GDP and investment. A model taking into account/approximating multivariate dynamic relationships between all the variables involved in our analysis is the vector autoregression of order k , or VAR(k), see Lütkepohl (2005). The system of equations can be expressed as

$$\mathbf{y}_t = \mathbf{a} + \mathbf{b}t + \mathbf{A}_1\mathbf{y}_{t-1} + \mathbf{A}_2\mathbf{y}_{t-2} + \dots + \mathbf{A}_k\mathbf{y}_{t-k} + \mathbf{u}_t \quad (1)$$

where $\mathbf{y}_t$ is the $n \times 1$ vector of all *endogenous* variables (e.g. TPU, GDP, etc.), $\mathbf{a}$ is a $n \times 1$ vector of constant terms, $\mathbf{y}$ is a $n \times 1$ vector of trend coefficients, $\mathbf{A}_j$ are $n \times n$ matrices of coefficients and $\mathbf{u}_t$ is a $n \times 1$ vector of error terms, with $\mathbf{u}_t \sim IID(0, \Sigma)$. Under suitable regularity conditions, (1) possesses an infinite vector moving average representation (VMA) of the form

$$\mathbf{y}_t = \mathbf{c} + \mathbf{d}t + \mathbf{u}_t + \mathbf{C}_1\mathbf{u}_{t-1} + \mathbf{C}_2\mathbf{u}_{t-2} + \dots \quad (2)$$

that expresses $\mathbf{y}_t$ as a function current and past of the error terms, $\mathbf{u}_t, \mathbf{u}_{t-1}, \dots$ and the $n \times n$ matrices $\mathbf{C}_j$ are called the VMA or impulse-response coefficients and summarize the dynamic effects of a change in $\mathbf{u}_t$ say h periods after the shock (given by the coefficient matrix $\mathbf{C}_h$).

The VAR in standard form (1) is also called a *reduced form* VAR, as it does not model the concurrent relationships in $\mathbf{y}_t$ explicitly and the error terms $\mathbf{u}_t$ do not have a *structural/economic* interpretation. A VAR in *structural form* (SVAR) is given by

$$\mathbf{y}_t = \mathbf{\alpha} + \mathbf{\beta}t + \mathbf{B}_1\mathbf{y}_{t-1} + \mathbf{B}_2\mathbf{y}_{t-2} + \dots + \mathbf{B}_k\mathbf{y}_{t-k} + \mathbf{\varepsilon}_t \quad (3)$$

and the corresponding structural VMA representation by

$$\mathbf{y}_t = \mathbf{\gamma} + \mathbf{\delta}t + \mathbf{\Psi}_0\mathbf{\varepsilon}_t + \mathbf{\Psi}_1\mathbf{\varepsilon}_{t-1} + \mathbf{\Psi}_2\mathbf{\varepsilon}_{t-2} + \dots \quad (4)$$

with $\mathbf{\Psi}_h$ capturing the dynamic effects of a structural shock in $\mathbf{\varepsilon}_t$, h periods after the shock. For identification purposes we assume that

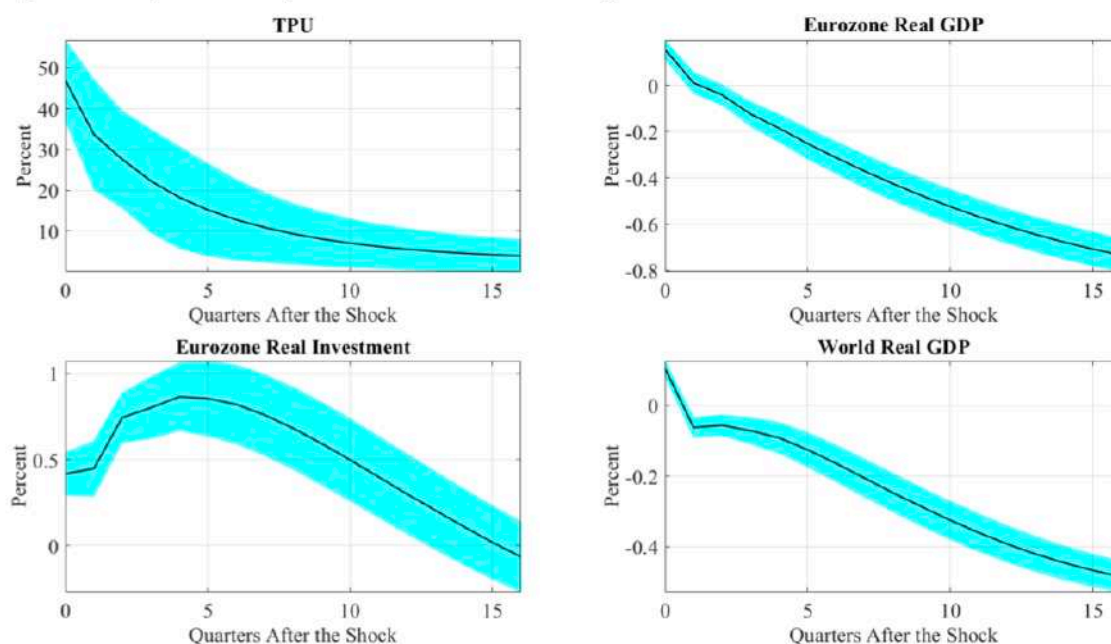
$$\mathbf{u}_t = \mathbf{\Psi}_0\mathbf{\varepsilon}_t$$

with $\mathbf{\Psi}_0$ being a lower diagonal matrix, with the elements in the main diagonal being the standard deviations of each structural shock contained in $\mathbf{\varepsilon}_t$. Placing the TPU variable first, our identifying assumptions imply that contemporaneously, TPU responds *only* to own shocks, while all other variables in the system are allowed to respond contemporaneously to TPU shocks, with coefficients of the contemporaneous given by the first column of $\mathbf{\Psi}_0$. Typically, one assumes that the shock ε_t^{TPU} increases by one standard deviation, but we impose a two standard deviation increase below.

All our VAR models include two lags of the endogenous variables and a deterministic time trend.¹¹ We estimate a model that includes the real GDP of Eurozone (YER), the Eurozone gross fixed capital formation (ITR), a measure of world real GDP (YWR)¹² the US tariff rates, the Eurozone nominal effective exchange rate (EEN) and TPU.

The responses to a two standard deviation increase in TPU on Eurozone real GDP, investment and world real GDP are reported in the figure below - horizon is in quarters after the shock. The first thing to note is that a two standard deviation shock to TPU leads to a drop in Eurozone GDP of about 0.43% at a two-year horizon with the drop reaching 0.73% three years out. This drop can be explained by the fact that such a shock leads to a *global recession* (i.e. a drop in trading partners' GDP) drops by about 0.25% and 0.48% respectively at the two- and three-year horizons - the effects being quite persistent. It is important to note that there is a positive effect on impact on both the Eurozone and the world real GDP which, however, is short lived and lasts only for a quarter. Moreover, the cumulative Eurozone output loss is 6.49% three years after the shock, whereas the cumulative output loss for the rest of the world is about 4.11% at the same horizon. The potentially good news is that these drops in overall economic activity are coupled with a short-lived significant increase in investment: gross fixed capital formation (GFCF) increases between 0.87% and 0.68% at horizons of four to eight quarters after the shock - but returns to its pre-shock level at the three-year horizon.

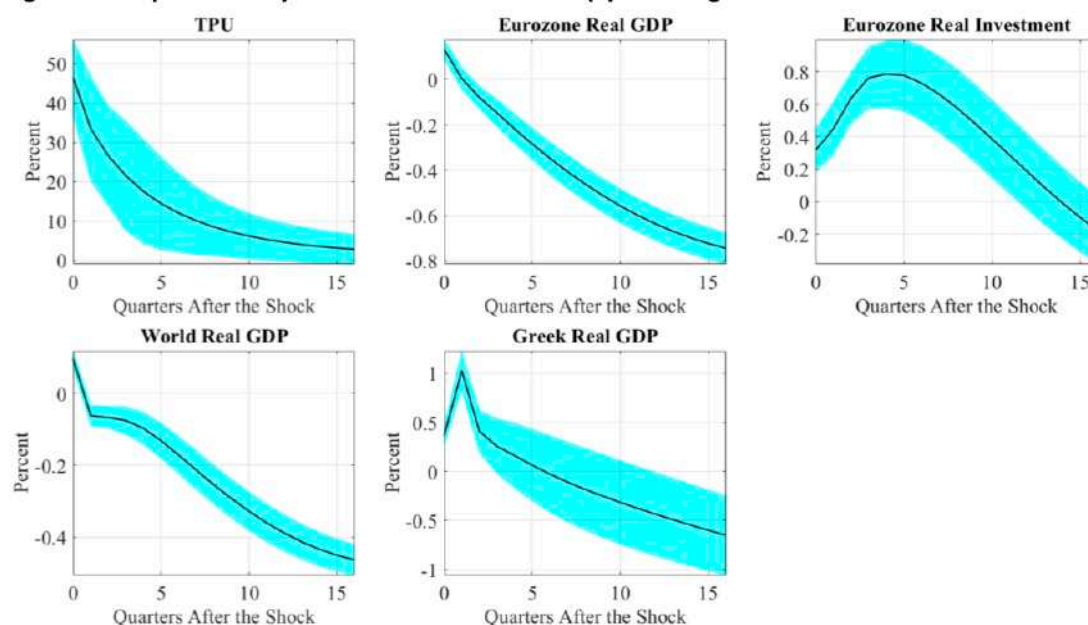
Figure X: Response of Key Macroeconomic Variables (I)



Notes: The figure reports impulse responses to a two-standard deviation shock to (log) TPU. The horizon is in quarters after the shock and the shaded areas indicate the 90% confidence intervals obtained using the bootstrap standard deviation of each point estimate (based on 999 replications).

To get a feeling of how these changes may be affecting the Greek economy, we have estimated the above model adding Greece's GDP to the analysis. Whereas our main conclusions remain unaffected, we find that the Greek GDP increases after such a shock by almost one percentage point, but only briefly - the effect becomes insignificant within three quarters - as the medium-term effect (about two years after the shock) is negative and significant.

Figure XI: Response of Key Macroeconomic Variables (II) including Greek GDP



Notes: See notes for previous figure

Alternative Scenarios and their Effect on the Greek Economy

As the evidence discussed above has mostly a European focus and the effects of trade policy uncertainty on Greek GDP were found to be modest in magnitude, we further explore how the different scenarios and macroeconomic projections would translate in losses in Greek real GDP. In particular, the scenarios we explore are summarized in Table I. These include the two scenarios in Tordoir *et al.* (2025), one scenario (CEPII-MIRAGE) in Bouët *et al.* (2025), and two scenarios also discussed above from Hinz *et al.* (2025). Finally, we employ three scenarios that draw on the work by the IMF (2025):

(i) the one that employs only a trade war as a shock (IMF-TRADE); (ii) one that employs all types of disturbances and uses the estimated output effects in 2026 (IMF-GLOBAL); and (iii) one with all types of disturbances and uses the estimated output effects in 2030.

Table I: Scenarios of GDP Changes in Trading Partners

Scenario	GDP USA	GDP EU	GDP CHN	GDP ROW
Tordoir <i>et al.</i> (2025) - A	0.30%	-0.01%	-0.15%	-1.07%
Tordoir <i>et al.</i> (2025) - B	0.30%	-0.06%	-0.15%	-1.07%
CEPII-MIRAGE	-1.30%	-0.10%	-1.30%	-0.20%
KITE-1	-1.69%	-0.22%	-0.61%	-0.83%
KITE-2	-1.51%	-0.66%	-0.48%	-0.77%
IMF-TRADE	-1.25%	-0.50%	-1.00%	-0.50%
IMF-GLOBAL	-2.25%	-1.75%	-2.25%	-2.00%
IMF-GLOBAL-LR	-0.75%	-1.00%	-1.00%	-0.75%

To obtain estimates of these effects on Greek GDP, we have initially estimated the long-run income elasticities of Greek exports of goods and services separately towards the US, the EU, China and the rest of the world.¹³ We then combine these with the predicted income changes according to the scenarios to obtain predicted changes in exports of goods and services and translate these into output effects using either the overall export shares in 2023 (the last period for which we have data) or the average export shares over the period 2005-2023. Results are summarized in Table II.

Table II: Effects of Different Scenarios on Greek GDP

Scenario	Exports Goods	of Exports Services	of GR (2023)	GDP GR (2005-2023)
Tordoir <i>et al.</i> (2025) - A	-1.13%	0.58%	-0.16%	-0.11%
Tordoir <i>et al.</i> (2025) - B	-1.19%	0.52%	-0.18%	-0.13%
CEPII-MIRAGE	-3.21%	-9.31%	-2.81%	-1.87%
KITE-1	-3.78%	-11.70%	-3.47%	-2.30%
KITE-2	-3.89%	-11.05%	-3.36%	-2.23%
IMF-TRADE	-3.70%	-9.55%	-2.99%	-1.98%
IMF-GLOBAL	-9.53%	-19.87%	-6.67%	-4.44%
IMF-GLOBAL-LR	-4.08%	-7.53%	-2.64%	-1.76%

Notes: The table reports the estimated changes in Greek exports of goods and services according to different scenarios. The value of GR GDP (2023) uses the share of exports of goods and services to GDP in 2023 to express these in changes of output. The value of GR GDP (2005-2023) employs the average share of exports of goods and services to GDP over the years 2005-2023 to express these in changes of output.

We note that while under the early scenarios of Tordoir *et al.* (2025) the reduction of Greek GDP might be small (less than -0.2%) under the other scenarios the effect is found to be sizable with the drop reaching even 4.4% - 6.7% - something that has apparently been skipped in discussion by the Greek media and has received much less attention. Based on these numbers, we would urge Greek policymakers and Greek exporters alike to closely monitor the evolution of macroeconomic conditions. Note that while the direct exposure of Greece to US tariffs is rather limited (the share of exports of goods towards the US is about 5-6%), the above estimated impacts come from “second round” effects that kick in once a trade war starts and are affecting *all* of Greece’s trading partners.

Conclusions

Our empirical analysis as well as the overview of other studies suggest that as far as the *direct* economic effects of US tariffs on income and welfare are concerned, these are expected to be modest in magnitude: most studies we have reviewed estimate these effects to be larger for the US and China (between 0.48% and 1.69% losses of output) but much smaller for the EU (between 0.10% and 0.66%), depending of course on the type of retaliatory policy the US trading partners will adopt. What seems to matter more, however, as shown by our analysis and by the IMF projections, is the effect on the resulting uncertainty: these are second round effects but are far from being of secondary importance. Once the direct effects are coupled with the surrounding uncertainty and perhaps the global tightening of financial conditions, the expected output losses become sizable: they may reach 2.25% for the US and China and 1.75% for the EU, although in the EU case there is quite a divergence on how they will be spread across countries.

More broadly, the whole tariffs saga raises the question of whether we are experiencing the birth (or resurgence) of an alternative paradigm of trade policy away from free market and liberalism. The instrumental use of tariffs in pursuit of national interest, as envisaged in the Mar-a-Lago Accord approach, suggests so, but it is too early to be conclusive and definite about it. After all, it depends on the longevity and legacy of the Trump administration and its policies, which in turn will be conditioned by the effectiveness of such a protectionist policy turn. In the past, any successful paradigm shift was triggered by major crises that revealed the structural weaknesses of the previous system, generating tectonic pressures that states could not resist. To our understanding, we are not at this point yet. However, the question is whether the system can be regenerated by a 'coalition of the willing', ready to withstand the fashionable (neo)protectionist urge with its proponents in Europe and beyond. In the long run, this would necessarily require a reform of the multilateral organizational framework of international trade and an outreach to the Global South that justifiably feels ignored in the ongoing reform debate of the international system. Needless to say, the role of the EU in this process is critical. In the short run, strong opposition and resistance to US unilateral trade policies, from governments and markets alike, seem to lead to their accommodation or even suspension. As we are waiting for the next critical milestone(s), an orchestrated response could balance out bilateral American leverage and bring forward better results.

Notes

1 For a comprehensive critical account of the features of the Mar-a-Lago Accord, see, among others, the special issue of *The International Economy* (Fall 2024), entitled "Dollar Fantasy? What to make of the proposed Mar-a-Lago Accord and the US Dollar?", with more than thirty contributions on the subject, available at: https://www.international-economy.com/TIE_F24_MaraLagoAccord.pdf

2 These can be interpreted as being equivalent to a 25% ad valorem tariff.

3 See also Conteduca et al. (2025) for a related analysis.

4 This includes the February and March measures, the observed tariff escalation with China, and the suspension of the reciprocal tariffs announced on 2 April 2025.

5 The assumption is that these products will face tariff increases in line with those previously imposed on steel, aluminium, and cars - i.e. a 25- percentage point hike.

6 Chinese output is expected to fall by 0.34% in this case.

7 In this instance the US output is expected to fall by 1.344% and the Chinese one by 0.274%.

8 See Graph II.1.3 and Graph II.1.3 in European Commission (2025).

9 The code of the growth rate is NAEXKP01GRQ657S and is available from the Federal Reserve Economic Data at Federal Reserve Bank of St. Louis.

10 In fact, with monthly and including the period after January 2025, the jump in TPU is even larger!

11 The lag length choice was based on the AIC. Employing four lags delivers similar insights to the ones discussed here.

12 This is built using the real GDP of US, UK, Japan and Switzerland.

13 Exports of goods income elasticities vary between 1.08 (US) and 1.25 (EU) and exports of income elasticities vary between 0.96 (rest of the world) and 5.91 (US).

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Annex I: Analytical Timeline of U.S. Tariff Policy Developments and International Trade Responses (2025)

Date	Description
Jan 20, 2025	America First Trade Policy Memorandum
Feb 1, 2025	Broad Tariffs Announced on Canada, Mexico & China; Canada Retaliates
Feb 3, 2025	Temporary Suspension of Tariffs on Mexico and Canada
Feb 4, 2025	Tariffs on China go into effect, end of duty-free packages from China; China retaliates
Feb 5, 2025	De Minimis Exemptions Maintained Temporarily Pending Tariff Collection System Upgrade
Feb 10, 2025	China's tariff retaliation goes into effect & US reimposes tariffs on steel and aluminum
Feb 13, 2025	Reciprocal Trade and Tariffs Memorandum
Feb 21, 2025	America First Investment Policy Memorandum & Defending American Companies and Innovators From Overseas Extortion and Unfair Fines and Penalties Memorandum
Feb 25, 2025	U.S. declares copper imports as a national security threat
Mar 1, 2025	U.S. declares timber and lumber imports as a national security threat
Mar 4, 2025	U.S. tariffs go into effect on Mexico and on Canada; Major retaliation from China & Canada
Mar 6, 2025	U.S. exempts imports from Canada and Mexico satisfying USMCA rules of origin requirements
Mar 10, 2025	China's tariff retaliation goes into effect
Mar 12, 2025	Tariffs on steel and aluminum go into effect; Canada retaliates against US steel and aluminum tariffs
Mar 20, 2025	U.S. announces critical minerals industrial expansion
Mar 25, 2025	U.S. imposes secondary tariffs on venezuelan oil via third countries
Mar 26, 2025	Tariffs introduced on automobiles and automobile parts
Apr 2, 2025	"Liberation Day": Blanket tariffs announced on all trade surplus countries
Apr 3, 2025	Tariffs on automobiles but not parts go into effect; Canada announces new countermeasures in response to US tariffs on autos
Apr 4, 2025	China Escalates Trade Retaliation
Apr 5, 2025	Tariffs of 10 percent on nearly all countries go into effect

Date	Description
Apr 8, 2025	U.S. adds 50% tariff on chinese goods in response to retaliation
Apr 9, 2025	Differential tariffs to be paused for 90 days; China raises retaliatory tariffs to 84%; U.S. responds with 125% tariff on chinese goods
Apr 10, 2025	China's tariff retaliation and U.S tariff changes go into effect; EU pauses retaliation
Apr 11, 2025	China sets retaliatory tariffs on U.S. goods at 125%; U.S exempts smartphones and other consumer electronics containing semiconductors from some tariffs
Apr 12, 2025	China's tariff changes go into effect
Apr 14, 2025	U.S. declares pharmaceutical and pharmaceutical ingredient imports, semiconductor and semiconductor manufacturing equipment imports as a national security threat
Apr 15, 2025	U.S. declares critical mineral and rare earth imports as a national security threat
Apr 17, 2025	Measures to Address China's Targeting of the Maritime, Logistics, and Shipbuilding Sectors for Dominance
Apr 23, 2025	Truck imports added to national security threat list
Apr 24, 2025	Unleashing America's offshore critical minerals and resources
Apr 29, 2025	Addressing certain tariffs on imported articles affecting the auto sector
May 8, 2025	Expected US-UK Economic Prosperity Deal
May 12, 2025	U.S. lowers certain additional tariffs on China from 125 to 10 percent and China removes certain retaliatory measures against the US
May 13, 2025	U.S. declares commercial aircraft, engines, and parts imports as a national security threat
May 28, 2025	U.S. Court Challenges Legal Basis of Executive Tariffs
June 3, 2025	Higher steel and aluminum tariffs announced
June 4, 2025	Higher steel and aluminum tariffs go into effect
June 11, 2025	Trump announces deal with China on Truth Social; no legal details provided
June 16, 2025	Steel tariffs expanded to appliances and more
June 26, 2025	Trump announces a new U.S.-China trade deal, reportedly finalized two days earlier, involving rare earth exports from China in exchange for the removal of U.S. countermeasures.
June 27, 2025	Trump ended trade talks with Canada over its digital tax on U.S. tech firms. China confirmed a deal to ease export controls in exchange for U.S. concessions.

Date	Description
June 29, 2025	Canada rescinded its digital services tax after Trump's ultimatum, and both countries agreed to resume trade talks aiming for a deal by July 21.
June 30, 2025	Trump threatens tariffs on Japan over its refusal to buy U.S. rice despite a domestic shortage.
July 3, 2025	U.S. to impose 20% tariffs on Vietnamese exports and 40% on trans-shipments via Vietnam.
July 6, 2025	Trump announces an extra 10% tariff on BRICS-aligned countries, citing "anti-American policies."
July 7, 2025	Trump warned 14 countries of 25–40% tariffs starting August 1, and extended the reciprocal tariff deadline to that date.
July 8, 2025	Trump announced a 50% tariff on copper and plans for new tariffs on semiconductors and pharmaceuticals.
July 9, 2025	Trump proposed up to 200% tariffs on pharmaceuticals, delayed up to 18 months, confirmed 50% tariffs on Brazilian imports and copper, and sent tariff notices to seven more countries. Meanwhile, the EU pushed for a stand-still clause to halt new tariffs, aiming to reach a trade deal by August 1.
July 12, 2025	Trump threatens 30% tariffs on the EU and Mexico, two of America's top trading partners, effective Friday, August 1.

The Housing Problem in the European Union and Greece: Key Dimensions and Policy Responses

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Summary

- The housing crisis has emerged as a critical social and political issue across Europe, with rising prices and rents compared to income in an environment of deepening income and wealth inequalities.
- Housing is becoming increasingly unaffordable, as reflected in the growing housing cost overburden in Europe and Greece, especially for lower-income groups.
- The access to affordable housing in Greece for low-income households decreased again after 2021, reaching crisis levels in 2024
- The housing crisis is structural (construction costs, borrowing costs, housing as an investment asset, short-term rentals) and limits the scope of national and local policies.
- The New European Bauhaus programme has three main objectives, including affordable housing.
- Affordable housing is at the heart of European initiatives - e.g., the European Plan for Affordable Housing, and the New European Bauhaus - creating opportunities for housing policy in Greece.
- Current challenges for the development of affordable housing in the EU are facing competing political priorities.
- The housing question in Greece is the outcome of a long journey (from the protected housing market, its gradual liberalization, the sovereign debt crisis, until the free housing market) that led to the housing crisis.
- The role of the sovereign debt crisis in the housing crisis was primary, but its consequences were not immediate
- The significant impact of tourism, foreign real estate investment, and short-term rentals on the national development model further deepened the housing crisis.
- Solutions to the housing problem must include both market regulation and measures beyond the market.
- The need for long-term strategic planning, combining immediate market regulations (price and rent control, limits on touristification, protection of vulnerable households) with medium- and long-term measures beyond the market (social housing stock, re-use of vacant buildings, fair energy renovation), to secure housing as a social right and a basic social good.

Introduction: The housing crisis in the world, the EU and Greece

In the Western world, the housing problem is a consequence of the industrial revolution and the transition to the capitalist system. Traditional forms of housing in rural communities could not accommodate those who flocked to the cities to meet industry's growing demand for labour. Access to housing was constituted as a social right, as accommodation was often provided close to the workplace by employers, usually with the help of the State, in response to increased needs and demands.

In the early 20th century, rental housing was a key area for investment. The two world wars and the 1929 crisis increased housing needs and, in combination with the labour movements, led to the lowest social inequalities in modern times.¹ In this period, housing became much more affordable, mainly through market regulation, as in New Deal-era America and Germany, or through the de-commodification of housing, as in Western and Northern Europe by means of the welfare state. Mass production and the provision of public housing led to prices significantly below those of the market and, above all, to low rents, to which a strict framework regulating renting and lending also contributed.

In most European countries, de-commodification was based on the development of "social housing" and was mainly aimed at the social strata that needed it most, though also at the middle classes through partial de-commodification, as in France. In the Nordic countries, for example, the beneficiaries covered a much broader swathe of the social fabric. In Sweden, public housing was never called "social housing", thereby conveying the message that being provided with housing was a general social right that should not stigmatize those that needed it most.

In the last quarter of the 20th century, de-industrialization, the expansion of the middle classes, and the influx of poor immigrants changed the global political climate. These factors were combined with the prevalence of neoliberal ideas and policies that facilitated the shift of globalized capital towards urban and real estate investment,² financializing housing³ and increasing inequalities in income and wealth. Amidst these changes, the production of affordable housing declined and the concept of housing as a social right lost ground to that of housing as an investment product. Access to home ownership has increased significantly, making housing a personal issue for a significant part of the social spectrum. The en masse privatization of housing has made it harder to access satisfactory housing that is also in a desirable location, especially for tenants lower down the socio-economic scale. The housing crisis in Western cities has pushed poverty to their fringes, with the most economically vulnerable households seeking affordable housing in increasingly peripheral areas, which has a negative impact on both their mobility and their access to essential services.

Europe was the home of the robust welfare state, whose main pillar was housing. However, over time, the welfare state has retreated significantly, especially in relation to access to housing, ceding far more ground to the housing market. Nonetheless, a significant proportion of the housing in most Western and Northern European countries is still provided by the public sector. These countries also continue to regulate the housing market more than the rest of the world, and in a number of different ways. In Eastern Europe, the mass privatization of housing was the rule against the backdrop of the abrupt transition away from state socialism and extremely high state involvement in housing provision. In Southern Europe, the housing issue has followed in the footsteps of Western Europe, but limited industrial development, an anaemic welfare state, and the clientelistic handling of the housing issue have all left their mark. In Greece, the destruction wrought by World War II, the Occupation and the Civil War, the authoritarian democracy of the post-civil-war period, and American protectionism all impacted on housing and contributed significantly to the direction taken in the solutions adopted in the post-war period⁴.

The housing problem in Europe

Aspects of the housing crisis

The housing problem is currently a critical social and political issue across almost all of Europe. It is now commonplace across the political spectrum to acknowledge that the EU is facing a "housing crisis", and housing now figures prominently in opinion polls as the most - or one of the most - important problems facing Europeans; this also makes it a crucial electoral issue.⁵

The issue has manifested primarily in the continuous and disproportionate increase in rents and house prices in recent years, in parallel with rising energy costs and a high cost of living. House prices in Europe increased by more than 20%, and rental prices by an average of 48%, between 2015 and 2023.⁶ At the same time, inequalities are growing, particularly in terms of accumulated wealth, while the rise in house values appears to be working in favour of home-owners, who make up over 60% of Europe's population.⁷

Housing affordability is the main indicator of the crisis and the focal point of the debate on the required policy response at the European level. In line with the approach taken by Eurostat, households that spend more than 40% of their disposable income on housing are considered to face a [housing cost overburden](#).⁸ In 2023, 10.6% of households in cities and 7% of households in rural areas exceeded this threshold. The corresponding percentages for Greece were 31% and 24.7%, respectively. Housing inequality in Europe is also captured in the unequal distribution of the housing cost overburden, which is more pronounced among lowest-income households (27.8% in the 1st and 8% in the 2nd quintile in the EU-27, and 88.6% and 35.7% respectively in Greece).⁹

The main causes of the housing crisis in Europe today are identified as the **rise in construction and borrowing costs**, which limit supply and push up prices, and **housing increasingly being turned into an investment product** for companies and individuals alike. This, along with the proliferation of short-term rentals fuelled by the growth of tourism, particularly in large urban centres, has significantly reduced the availability of affordable housing.

Indicatively, as discussed in detail in a recent policy study,¹⁰ in Greece and Southern Europe more broadly, housing has been transformed into an investment product along three main routes, each of which has been supported by public policies linked to economic growth objectives: First, **the attraction of foreign capital** through the "Golden Visa" programme and special tax regimes for wealthy foreigners, which act as a catalyst for skyrocketing house prices and rents. Second, **the management of private debt**, which, in the wake of the financial crisis, has become a sphere in which value is extracted from non-performing loans and collateral. With extensive support from public funds, this process has led to the concentration of a large part of the housing stock in the hands of banks, REOCos and servicers, with the participation of international funds. Thirdly, the **activation of business activity in the residential rental market**, with new forms of investment (student accommodation, corporate apartments, Real Estate Investment Companies, etc.) and a particular emphasis on "alternative sectors" and forms of non-residential use, such as short-term tourist rentals, which are now established as an institutionalized business activity.

It is clear that the current housing crisis is structural and linked to the transformations of global capitalism in recent decades. The long-term dominance of neoliberal housing policies - through the privatization of public stock, the reduction of public interventions and funding, the promotion of private for-profit operators, and the financialization and commercialization of housing - has drastically curbed national and local governments' ability to deal effectively with the crisis. Thus, despite growing recognition of the need for stronger intervention, policy responses remain largely trapped in market and financialized logics.

In these conditions, market mechanisms lead to the marginalization of poverty, increased gentrification, and defensive housing practices – such as prolonged residence in, or return to, the parental home,¹¹ compromising with worse or unacceptable housing conditions,¹² and being forced to relocate to less desirable neighbourhoods – which serve together to increase housing insecurity and lead to deteriorating living conditions for an increasing number of people, while the number of homeless people remains high.¹³ The challenges posed by the housing crisis are simultaneously intensified by both demographic developments (an ageing population, an increase in the number of households) and the management of migration.

Interventions and planning at European level

Towards a European Affordable Housing Plan

Housing was never a key EU policy issue until now. It was always secondary in nature, in the sense that it supplemented Member States' national policies, as is the case with all social policy issues. Although housing policy remains a national competence, a number of European policies, such as the single market, social cohesion and environmental policy, have a direct impact on national housing systems and allow for a more coordinated intervention at European level. Housing problems, especially those facing the most vulnerable groups, such as the homeless or migrants, have been at the heart of European strategies in the past,¹⁴ but the systematic engagement with housing is a far more recent development.¹⁵

Initially, the [Urban Agenda's Housing Partnership](#) (2016-2018) helped advance the European debate on affordable housing by proposing better documentation, institutional coordination, the removal of regulatory barriers (such as the restrictive definition of housing as a Service of General Economic Interest and state aid rules), and more efficient use of public and private resources. Upgrading housing and tackling energy poverty were at the heart of the [European Green Deal](#) and the [Renovation Wave](#) (2020) strategy, within the framework of the [Next Generation EU](#) (Resilience and Recovery Fund - RRF) post-pandemic package, with a focus on climate adaptation and a just green transition. A number of funds and financial instruments (such as [Invest EU](#) and the [Social Climate Fund](#)) have been created within this framework. The [Affordable Housing Initiative](#) of 2020 and the [New European Bauhaus](#) initiative of 2021 laid down specific guidelines on sustainability, inclusiveness and the aesthetics of constructions and housing, which we discuss in more detail below.

At the same time, in the context of the consultations on the regulation of digital platforms in the context of the internal market (2022-2024), the **European Parliament's regulation on the collection and sharing of data on short-term rental services** was adopted in April 2024.¹⁶ The intervention focuses mainly on the obligation of multinational companies that act as digital intermediaries for tourist and other rentals to provide analytical data via national hubs to allow the impact of short-term leases to be better monitored and documented.

The recognition of housing as a critical European policy issue by the current political leadership of the European Commission is considered an important breakthrough. In 2024, the **creation of an Energy and Housing portfolio** was announced for the first time, with the aim of *inter alia* developing a [European Affordable Housing Plan](#), which will facilitate Member States' access to finance as well as the implementation of public housing policies.¹⁷

Areas where the EU can add value

The Commission has identified priority areas to support Member States to address structural drivers and unlock public and private investment for affordable and sustainable housing:

- Establish a pan-European investment platform for affordable and sustainable housing.
- Inject liquidity into the housing market and **double the planned cohesion policy investments** in affordable housing.
- Revise **state aid rules** to make it easier for member states to support affordable housing.
- Develop a **European Strategy for Housing Construction** to support housing supply.
- Support cities and regions to tackle the inefficient use of **empty and underused buildings**.
- Tackle systemic issues with **short-term accommodation rentals** and analyse the impact of housing speculation.
- **Bring down energy bills and reduce energy poverty** to make homes affordable, decent, and sustainable.

Through the **Affordable Housing Dialogue** we will identify further areas where there could be European added value.

Source: European Commission official webpage, *Affordable Housing* (access 06/09/2025).

Financial instruments and support services are currently being developed to facilitate this policy objective. The [European Investment Bank Action Plan](#) will support new housing by providing consultation on and financing innovations in the construction sector, with the goal of building affordable and energy-efficient housing, and of renovating old housing stock. At the same time, in the context of the [redesign of the Cohesion Policy](#), a recent decision allows for a doubling of funds for investment in affordable housing (e.g. through the ERDF) starting in the current programming period (2021-2027).

The New European Bauhaus policy and the importance of affordable housing policy

The New European Bauhaus (NEB) project¹⁸ was developed in response to the dual challenge of the housing and ecological crisis, as building stock is one of the most important drivers of energy waste, limited recycling and pollution.

The three core principles of the NEB programme - **Sustainability; Beauty and Quality of experience; Inclusiveness** - are interrelated and afforded the same significance in every urban and residential project that wants to be NEB-compatible. That is, it must achieve a positive assessment in each of the three core principles, and not cumulatively.¹⁹ Regarding affordable housing, it is an important issue for the NEB programme that, for example, the energy shielding and ecologically upgrading of the housing stock should not lead to the most vulnerable social groups being priced out of that housing.

Affordable housing falls under the core principle of Inclusivity, which is subdivided into the issues of Affordability²⁰ and Accessibility,²¹ in the sense of distance and physical barriers, but also discrimination against specific groups; plus the additional issues of accessibility and affordable housing which are created by traditional segregation between housing areas and gentrification processes.

Segregation (social and/or ethno-racial) **between neighbourhoods** reproduces unequal opportunities and unequal social outcomes, especially in areas where social and ethno-racial mixing is limited, such as in cities in the US. In most of the cities in the world with a higher degree of social and ethno-racial mixing, the segregation created by social hierarchies at the spatial micro-scale is clearly an issue. This micro-segregation of housing in urban neighbourhoods²² raises the question of its impact on the social reproduction of social inequalities.²³ At the same time, 'gentrification' is another topical issue that is restricting the access of vulnerable groups from the neighbourhoods they used to live in and the services they used to have access to, or displacing them entirely, while also altering housing segregation at the micro-scale.

However, the NEB programme is not a binding policy for housing and building stock production in the EU, in the same way that fiscal policy or defence spending are. It is a programme consisting of core principles promoted by the EU leadership, which will potentially provide financial support to those who are active and invest in line with them.

Challenges and policy debates on housing policy

The current debate emphasizes increasing supply through faster, cheaper construction, more financing, and less bureaucracy.²⁴ However, there are concerns that channelling resources without a long-term strategic focus on structural solutions - such as strengthening public intervention, expanding the stock of public and social housing, and limiting speculative investment in housing - will exacerbate the problem, providing opportunities for the private sector to profit without producing a matching social benefit.

More generally, concern is expressed about the gaps, the contradictions/inconsistencies and major challenges the initiative aimed at solving the housing issue at a European level will confront in the current context. Specific political issues and areas of disagreement between different political groups and approaches include:

- **The ambiguity in the definition both of "affordability"** and the main socio-political objectives of EU housing policy.²⁵
- **Over-investment in the building of new housing** rather than reusing the existing stock and introducing regulatory measures to stabilize the market (e.g. price controls, resale limits, restrictions on non-housing uses of the housing stock).
- Remaining **locked into the logic of partnerships with the for-profit private sector** to mobilize private investment, despite the negative experience of implementing such policies in the past.
- **The close link between housing finance and the energy transition**, although crucial, increases production costs as it has been almost entirely - and one-dimensionally - linked to the promotion of expensive technological solutions and rigid performance indicators.

These trends favour the channelling of public resources towards the middle and upper social strata, leaving the social groups most in need exposed and creating fertile ground for political exploitation by the Far Right. ²⁶

But perhaps the most important challenge of our era is the political-economic situation itself: the diversion of more and more resources to military spending and security policies, combined with the structural inability of the European framework to guarantee strong universal housing policies, is seriously testing Europe's welfare state and its future.

Interventions to tackle the housing crisis in Europe's cities

The housing problem may be universal, but it is not the same everywhere. To a great extent, the adopted responses reflect the different traditions and specificities of local housing systems. As recorded in the Eurocities survey, ²⁷ affordable and social housing is now a central priority for most local governments, which are testing interventions aimed in different directions, such as: regulatory measures against speculation and the diversion of housing stock into tourist industry use, relief and support for the most vulnerable and economically weak groups, utilization of empty housing stock, and above all efforts to expand the public stock of social housing ²⁸ with extensive investment programmes, which they either implement with their own resources or through the use of available European financial instruments.

[Vienna](#) remains an iconic example of long-term investment in municipal and social housing combined with a strict market regulation framework; as a result, over half the housing stock remaining socially regulated and affordable. However, cities with less of a social housing tradition, such as [Barcelona](#) and [Turin](#), are now also adopting comprehensive strategies and innovative policies to strengthen public intervention in housing, while several cities, such as [Amsterdam](#) and [Bordeaux](#), have led the way in measures aimed at reducing short-term tourist rentals. In parallel, important best-practice and knowledge-sharing hubs have been established,²⁹ and extensive studies and guides have been produced in support of the policy-making process.

In any case, the direction and specific focus of housing policy remains the responsibility of the Member States, and any solutions to the housing problem have to be adapted and developed in the light of the socio-economic conditions in specific states, and the history of their housing sectors. In Greece, as we discuss below, the absence of a developed housing policy, weak administrative mechanisms at the central and local level, the long-standing bias in favour of the private sector, and the lack of a powerful public body capable of defining the criteria for social and affordable housing, increase the risk of an important opportunity being missed. The use of the European funds that are available could support a new direction in housing policy, with an emphasis on creating affordable stock in the long term, on activating the dormant building stock, and on institutionally strengthening public intervention.

The housing issue in Greece

From a singular protectionism to the free market

Housing conditions in Greece during the interwar period were extremely problematic³⁰. They became even worse with the war, the Occupation and the Civil War, but began to improve rapidly in the 1950s. The pace of economic development and the socially conciliatory political climate of the post-war authoritarian democracy³¹ both relied on construction and broadened social access to housing³².

Unlike the countries of Western and Northern Europe, Greece did not follow the path of the welfare state and the public production of social housing. Nonetheless, the handling of housing in Greece in the first post-war decades was effective. As the population flocked to the cities, policies focused on empowering the newcomers to acquire a residence in their new environment. This was implemented by encouraging self-building (facilitating the acquisition of plots of land that were converted into building plots; access to cheap or even free building materials; limited inspection to ensure compliance with building regulations)³³ which, coupled with the investment of personal labour and family mutual aid,³⁴ provided the young and economically vulnerable households flocking in from the countryside with access to urban housing.

At the same time, access to housing was strengthened through the *antiparochi* (land-for-flats) system, which offered access to home ownership to a large proportion of those that wanted it, and at low prices. ³⁵ The *antiparochi* procedure was shaped and applied on an enormous scale, virtually monopolizing building activity in Greece in the 1960s and 1970s. This was in line with a policy of protecting the small players in the construction industry - small-scale contractors and landowners - from the big ones - major construction companies, commercial banks and large-scale landowners - by increasing the percentage of

housing surface that could be built on a plot and by providing preferential taxation for *antiparochi* over every alternative way of building apartment blocks.³⁶

The systems of self-building and antiparochi facilitated access to owner-occupied housing for a large part of the social fabric, while simultaneously creating low and stable rent conditions for those who could not access owner-occupation. The systems of self-building and antiparochi produced housing for a market in which, as a commodity, housing functioned mainly as a durable use value - for the occupants themselves and their descendants - rather than as an investment product.

In the context of these housing systems in Greece, the process of accessing housing was reproduced for the majority as a personal/family affair. As a result, access to housing did not emerge as a social right.

Self-building and antiparochi gradually declined, with mortgage lending by commercial banks making a dynamic entry in the 1990s. As a result, prices rose rapidly and access to home ownership was restricted for the lower end of the demand, which often lacked the collateral required to borrow.³⁷ At the same time, the liberalization of lending for housing production and consumption led to soaring construction and house prices - regardless of real demand - and to household over-indebtedness during the financial crisis.

The content of the housing crisis in Greece

Throughout the post-war period and until recently, the housing problem was simply not on the agenda. The traditional systems of self-building and antiparochi provided access to affordable solutions without the need for strong direct public intervention. In today's conditions, however, the housing issue has emerged as a key social and political challenge at the very epicentre of the public and political debate.

In Greece, too, the housing crisis is mainly manifested in rising prices and rents, which make it difficult for an ever-growing portion of the population to access housing. The increase in house prices and rents has been significantly higher than income growth. According to Bank of Greece data, prices rose by 13.9% in 2023 and 8.7% in 2024, while household disposable income increased by just 8.1% and 5.6% respectively.³⁸ The housing crisis is also expressed in the decline in the home-ownership rate, due to the accumulation of properties by banks and debt management companies and the inability of young households to access home-ownership. For some years now - and thanks, too, to the economic crisis - Greek households, especially those with the lowest incomes, have been the most burdened in the EU in terms of both housing costs (Fig. 1) and over-indebtedness (Figs. 2 & 3). The rate of over-burden has been falling gradually in recent years in the EU and faster in Greece, but the decline does not extend to low-income households, for which the rate began to rise again after 2021, reaching 90% in 2024 (Fig. 1).

Fig. 1: Percentage of households over-burdened in terms of housing expenditure in Greece and the EU, 2015-2024³⁹

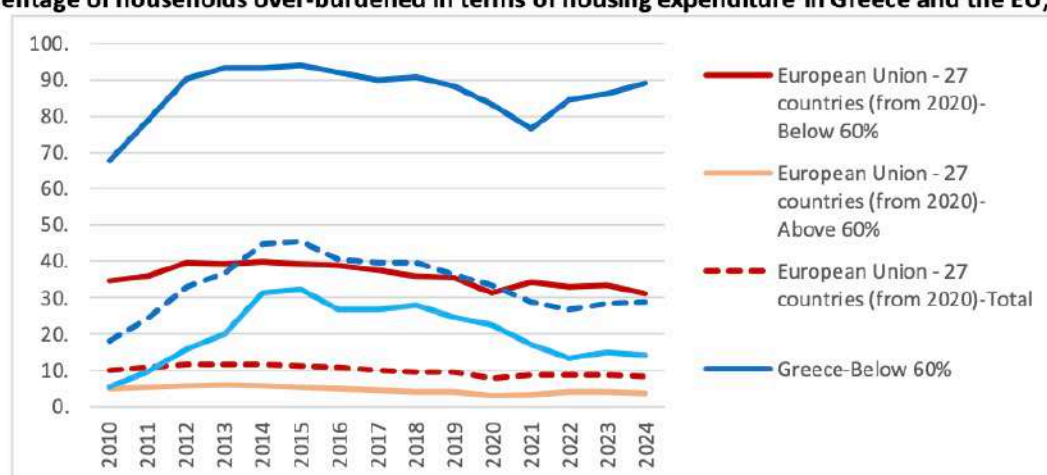
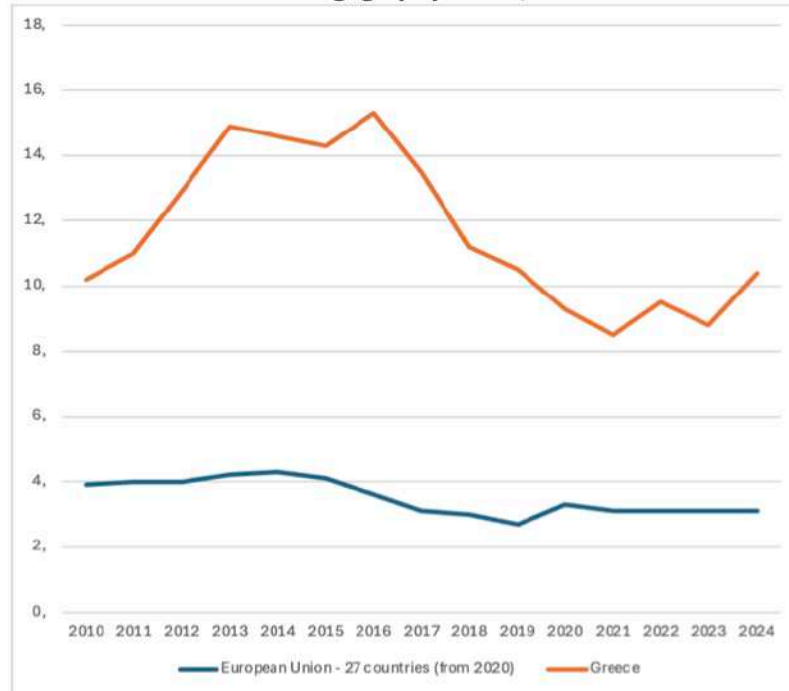


Fig. 2: Percentage of households in arrears on mortgage payments, rent or bills in Greece and the EU, 2010-2024⁴⁰



The high burden on Greek households also stems from the high proportion of non-performing mortgages (6.3% of mortgages in June 2025).⁴¹ At the same time, many young people - especially those who have not inherited a suitable property - find it difficult to find a house that meets their needs and is located in an area that suits them. With regard to access to owner-occupied housing in particular, the share of the total population that lives in owner-occupied housing has fallen significantly (from 78.0% in 2010 to 72.2% in 2024).⁴² This trend is impacting on younger generations throughout Europe, creating powerful intergenerational inequalities in terms of living conditions, the impact of rising prices, and the distribution of wealth.⁴³

The housing crisis has different characteristics for different social groups and in different regions. A typical example are the small cheap semi-basement and ground floor apartments in the centre of Athens, which function as de facto social housing, but are gradually being converted into rooms for short-term tourist rental, displacing the most vulnerable residents (usually poor migrants) who have no alternative housing solutions.⁴⁴ Another typical example is the changes along the Athens seafront, from Glyfada to Varkiza.⁴⁵ There, the intense construction activity - combined with the colossal Hellinikon construction project (the urban redevelopment of Athens' former airports) and hotel investments in the area - is targeted exclusively at high economic strata and foreign investors, creating gentrification pressures, even in middle and upper-middle class areas.

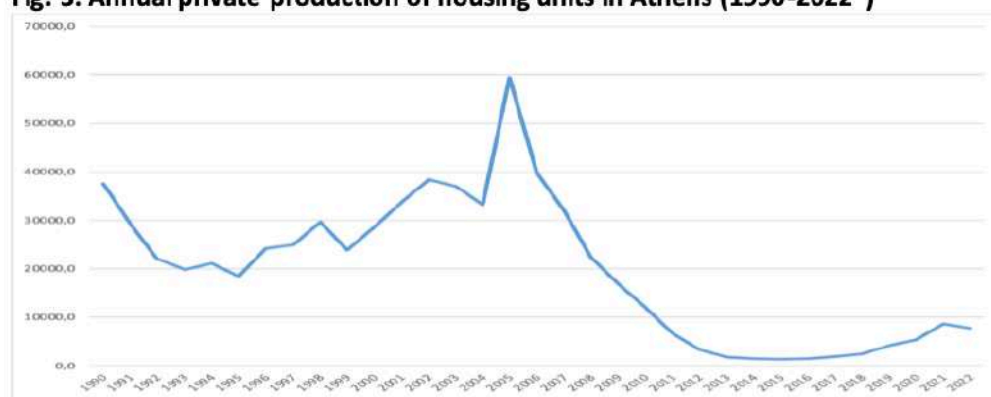
In addition, many long-term residents of rapidly changing areas - especially areas of tourist interest - are under pressure from the increased cost of living and feel alienated from their neighbourhoods, which are adapting to meet the consumption desires of their new temporary residents and visitors (new shops and restaurants and entertainment venues replacing the old ones, etc.). Most of the public-service employees (teachers, doctors, et al.) who are appointed to posts in areas with high tourist demand also find it difficult to find affordable housing.

The causes of the housing crisis

The causes of the housing crisis are multiple. The general context that led to this situation is the gradual transition from a particular form of market protectionism to a free housing market.⁴⁶ This transition was marked by the decline of traditional housing systems and their replacement by a housing market in which the few regulations that worked in the favour of vulnerable groups (such as rent controls) were abolished.⁴⁷ At the same time, this change was accompanied by the transformation of housing from a use value to an investment product (i.e. from a commodity that is not often traded as such, to a commodity that is put on the market both more rapidly and in multiple ways).

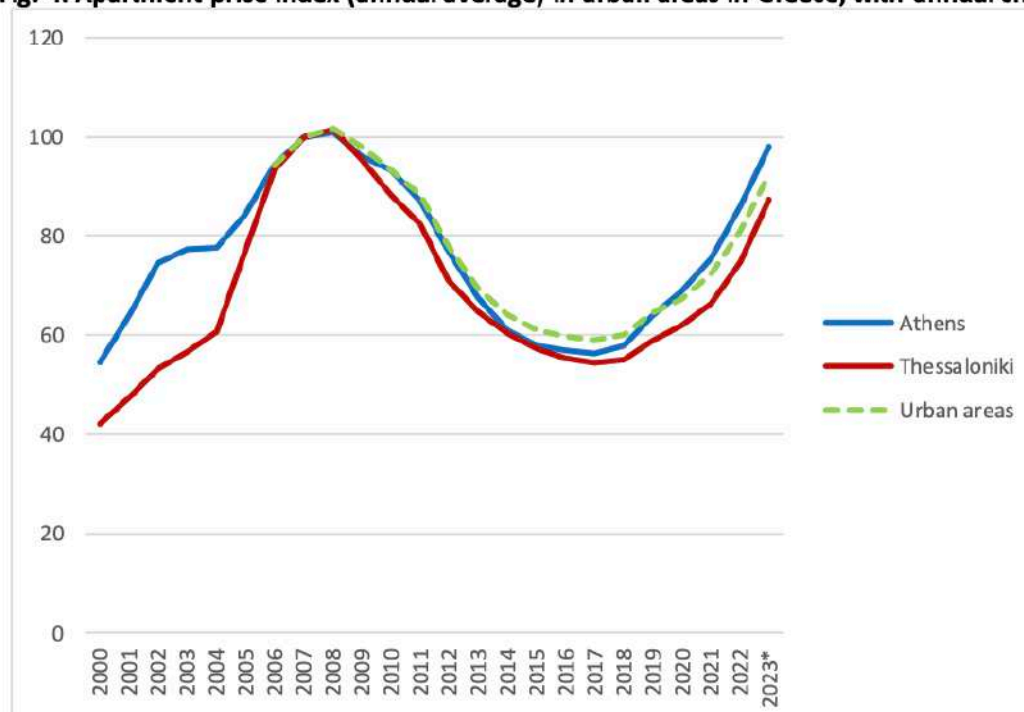
Policies were developed along the way, from the 1980s to the 2020s such as commercial banks starting to provide mortgages, which accelerated the relative transition by pushing up prices and rents and increasing the segment of the population unable to access housing.⁴⁸ The fiscal crisis in Greece brought the housing market to a total standstill, which is reflected in the sharp decline in housing production (Fig. 3). However, the crisis did not initially lead to a massive dispossession of properties, due to limited demand, but also due to the ban on foreclosures/auctioning, and the introduction of protective measures. At the same time, it also led to a very significant fall in real estate prices (Fig. 4), and to a significant portion of mortgages becoming non-performing. In the first year, mortgage loans were protected by the Katseli Law for principal residences - when they related to first homes - , but in the second year, they were sold to international investment funds for which non-performing loans represent an aggressive investment. At the same time, fiscal adjustment policies focused on increasing public revenues from the taxation of households' real estate holdings and creating a favourable environment for the more intensive commercial exploitation of what was considered a severely underused housing stock.

Fig. 3: Annual private production of housing units in Athens (1990-2022*)⁴⁹



* The data for 2022 relate to January-November.

Fig. 4: Apartment price index (annual average) in urban areas in Greece, with annual change 2000-2023⁵⁰



The fall in property prices was followed by a rapid increase in tourism, especially in the big cities, which started to become tourist destinations in their own right. The increase in tourism was boosted by international online platforms promoting short-term rentals.⁵¹ It was also boosted considerably by foreign investors who were attracted by the comparatively low purchase and production prices for real estate and by an expectation of high profits given rise to by the ongoing growth in tourist demand and the promotion of Greece as a destination for the wealthy (digital nomads, permits for third-country investors through Golden Visa)⁵² with the additional incentive of tax exemptions.

Short-term rentals and Golden Visa scheme led to the removal of a significant part of the housing stock that was formerly available for long-term rental, making it harder to find housing and raising rents.⁵³ Increased property prices were a parallel impact, as real estate becomes an increasingly lucrative investment.

The housing crisis, which has mainly emerged since the exit from the fiscal crisis, has not impacted equally on all social and professional groups. Professionals associated with construction, renovation and property management have had levels of employment they have not enjoyed for many years.⁵⁴ Owners of a few or numerous properties viewed the changes as a new opportunity, real or potential, to make the most of their property. Consequently, the housing crisis, which built up gradually, was not a negative development for the entire social body, especially in its first stages, and was not treated as such in the political arena. On the other hand, there is a clear trend towards the professionalization and centralization of the real estate activities sector and the professions related to it, which is gradually changing the structure of real estate ownership in Greece, along with its social and political role.

The housing crisis and the role of the market

In Greece, the houses produced or renovated by the market do not meet the country's social needs. New construction and renovations are mainly targeted at middle- to high-income earners and investors, as lower-income households are unable to afford them due to their limited purchasing power. Foreign demand has played an important role, with an increase in direct investment in real estate from abroad and a steady - if not growing - demand for golden visas.⁵⁵

The lack of public-sector support for the production of affordable housing - whether it be produced by public bodies or contracted out to private operators or built via partnerships between public and private bodies and, feasibly, civil society organizations - limits the prospects for increasing the affordable stock in a context in which the traditional means of accessing housing have declined and the safeguards for small and medium-sized players in the construction and real estate market have been removed.

Consequently, the housing crisis needs solutions beyond the market. Market control can reduce the severity of the problem, but it does not solve it. Solutions require interventions beyond the market which focus on strengthening public intervention aimed at providing affordable housing and making use of housing policy to support local development.

Existing and potential housing solutions: Challenges and dilemmas

The recent policy mix aimed at the housing crisis

Social housing policy in Greece has historically been deficient and mainly indirect (and primarily economic in nature), strategically targeting access to home ownership and boosting construction activity. Similarly, no strong public intervention bodies have emerged; such bodies have, indeed, been completely absent since the abolition of the Public Enterprise for Urban Planning and Housing (DEPOS) and the Workers' Housing Organization (OEK) in 2012. Since 2022, the public debate on the need for public intervention has been re-ignited, and the government has adopted measures to address the housing crisis, most of which are incorporated into Law 5006/2022.⁵⁶

Overall, housing policy in the country remains **subsidy-based, fragmented and oriented towards supporting demand**.⁵⁷ Most of the public expenditure (84%) allocated over the last two years was directed at owner-occupied housing (loan subsidies and owner-occupied housing upgrades); the expenditure as a whole related to non-reimbursable subsidies, tax exemptions and grants to private beneficiaries, owners, owner-occupiers or tenants.⁵⁸ A minimal percentage of the public expenditure went to the municipalities (1%) for the implementation of social housing programmes that mainly utilize subsidized private properties (See Tables 1 and 2 in the Appendix).

Incentives to private landlords (rent tax exemptions and renovation subsidies) to make their (vacant) properties available for long-term leasing have received particular emphasis in the public debate, but without the expected results, as they are not linked to a comprehensive framework permitting the registering and targeting of properties, entering into mutual commitments (in terms of pricing, length of commitment, etc.) and monitoring. Moreover, no attempt has been made to require the thousands of unutilized properties that have passed into the hands of banks, debt managers and investors to be made available immediately and at affordable rents.

A major shortcoming of current housing policy is **the absence of strategic planning and long-term targeting to strengthen the public sector** as the key driver for the application and implementation of housing policy, along with the non-profit third sector as a key partner in the development of a stock of permanently affordable housing and the ability to **rein in** the market and (re)orientate private investment towards the public interest and social benefit. ⁵⁹ This deficit relates to a period which has presented significant opportunities to finance such a break with the past. ⁶⁰

Rather, the available resources are seen primarily as an opportunity to strengthen the housing market, the real estate market and the construction sector. A typical case is the so-called "**Social Antiparochi**" introduced in 2022 and

amended in 2025, which introduces a new form of PPP for the construction of new housing on public land. This mechanism seeks to mobilize private capital to finance housing in exchange for the value of the land and the right to commercial exploitation - of up to 70% of the housing produced, and with full transfer of ownership, as provided for in the amendment to the original law - to amortize the initial investment and the developer's profit. The new provisions will lead to the complete privatization of all the new housing units within a decade, since, apart from the 70% transfer, it also permits - indeed, encourages - rental agreements which include an option for the beneficiaries to buy out the remaining 30%.⁶¹

Dilemmas related to housing formulation

Solutions to the housing crisis must address the long-term supply of affordable housing of a satisfactory standard, either through constructing new buildings or utilizing the existing stock. It is critical that the State contributes to this supply. There are many ways in which it can do so. Most of them have been tried and tested in various countries, but will need to be adapted to the Greek context in line with the strategic goals of a new housing policy. We list some key areas of reflection and choices that can contribute to this debate:

1. **Cash aid** (such as a housing benefit or an interest rate subsidy on a mortgage) or **in-kind aid** (such as the supply of low-rent public housing, often with an open-ended contract);
 - Cash aid is easier to plan and quicker to implement. It is a good fit for an 'executive state'. However, when they are the main pillar of state intervention, the market quickly neutralizes them and incorporates them as increased demand, resulting in higher property prices and rents.
 - In-kind support is far more effective and has a long-impact, but it requires both time and multiple resources over and above the possibility of funding it. These include: institutional resources (housing institutions with the necessary institutional competences, expertise and experience in managing housing programmes); control over the land factor (ownership or other form of control over the plot); linking housing with other policies (such as employment policies) so that housing and social policy in general functions effectively.
2. Strengthening access to **owner-occupied** or **rental** housing?
 - In post-war Greece, policies to boost access to housing related almost exclusively to home ownership⁶², and not only for housing reasons: it was also a way to attract electoral clients and their votes.
 - In housing terms, however, the failure to address rents and renting also entails the marginalization of the most vulnerable groups and the non-resolution of the most acute housing problems, such as the need for seasonal/temporary housing for students and workers.
 - At the same time, the unilateral reinforcement of owner-occupation reinforces very low housing mobility and is an obstacle to geographical mobility in the labour market.
 - In the context of traditional housing systems, owner-occupation also contributed indirectly to supporting the rental sector, as the abundant supply of new housing kept both prices and rents down. At the same time, family mutual aid networks provided for the needs of those of their members who were vulnerable in terms of housing. Traditional housing systems have declined and family networks now function on a much smaller scale. And no alternatives have emerged in today's internationalized housing market, which is exposed to the activities of corporate and financial interests motivated by profit rather than use value.
 - Balance and equivalent interventions are therefore needed to strengthen and protect both owner-occupiers and tenants.

3. Construct new housing or improve the existing stock?

- Demographic changes can lend support to both approaches: renovations, due to population decline, especially in areas with a shrinking number of permanent residents, and new construction, due to the increase in the number of households. The latter is certainly required when housing demand is in a different geographical location from the existing supply.
- Greece has a large unused building stock, vacant non-residential buildings, but also a large number of dwellings that are made available for non-residential uses, such as tourist rentals. A policy that prioritizes access to decent and affordable housing can provide immediate solutions for the existing stock, with socially-responsive renovation subsidies, social rental services, a ban on non-residential uses (e.g. tourist rentals), anti-profit clauses, etc. Besides, increasing residential density and limiting urban sprawl are optimal directions for spatial planning and urban policy from an environmental and climate perspective⁶³.
- The construction of new housing is time-consuming and generally more expensive. But it can provide solutions in areas with a housing deficit, while utilizing public property and implementing urban planning tools can contribute to the gradual development of a public and social stock.

4. The upgrading and ownership of the housing stock

- The issue of the green transition of the housing stock is already on the social and political agenda. The quality of the housing stock needs to be improved. While it is a relatively recent, its energy efficiency, the possibility of recycling the materials used, and participation in a circular economy are priorities that are now becoming imperative.
- The cost of upgrading buildings, which mainly concerns the owners, and its social repercussions highlight some of the problems that accompany the energy shielding requirement and the green transition.
- The State must estimate what changes the housing stock requires (upgrades or replacements?), depending on the type and period of construction. At the same time, it must acquire a clear picture of the social structure of ownership and the potential for intervention by each separate group of owners, while also evaluating the social implications and ways in which affordable housing policies could be developed.
- Without a policy of this sort, the many will either lose their property or see it deteriorate, while the few will benefit from considerable gains.
- A similar approach is needed in property taxation, as it is currently retaining property rather than acquiring it which is taxed,⁶⁴ placing a disproportionate burden on small owners and low-income groups, compared with large landlords and companies that pass on the cost to tenants.

5. Housing support for the most vulnerable or for a larger part of the social spectrum?

- Targeting aid at the most vulnerable is rooted in the logic of getting the best return on public spending by directing it at those most in need. Of course, this reasoning implicitly takes it for granted that the resources oriented towards social spending have been minimized, and that there are other priorities for public spending.
- The orientation of social assistance - housing and other forms - towards a broad social spectrum is based on the logic that housing is a social right that concerns everyone, while the universal character of housing assistance does not stigmatize those who receive it as having failed where others have succeeded.
- Neoliberal policies have entrenched the first logic, and it is not easy to reverse it. At the same time, in the current context, there is an ideological and rhetorical shift towards the development of 'middle class' policies that marginalize the most vulnerable and economically weak groups. This trend, apart from its political/electoral aims, leads to greater social polarization and antagonism focusing on the issue of immigration and its instrumentalization by the Far Right.

6. Aid for **top-down actions** or for local, participatory, cooperative **bottom-up initiatives**?

- Generally, top-down actions accord with neoliberal logic and with the concept of the executive state and a shrinking welfare state. They also correspond to a support structure that does not encompass the participation, co-creation, and the cooperative nature of small and usually local initiatives.
- In Greece, intervention at the local level is limited, but municipal actions have started to emerge that break new ground in a Greek context, such as the [Social Rental Agency of the Municipality of Thessaloniki](#) or [Rock the Block from the Municipality of Egaleo](#). Although there is no apparent intention to support municipalities and local initiatives - such as housing cooperatives or non-profit projects - through central policy planning, such actions could be supported by the EU, for example under the New European Bauhaus programme or via other funding mechanisms such as Invest EU and the European development banks (CEB, EIB).

Epilogue

The answers to these questions are neither simple nor the same for every country. They depend on the context and the prevailing conditions. In Greece, many of the responses require knowledge of the situation, which is often lacking. For example, public-sector-owned real estate and the possibility of utilizing it in the context of housing policies is often referred to as an important resource. However, the number of such properties, their type (buildings or plots), their condition and renovation requirements, their location in relation to housing needs, the institutions to which they belong (central government, local authorities, public benefit organizations, etc.), the required legislative and administrative actions, and how long it would be before they can be used are simply not known.

In Greece, we need to (re)establish public housing bodies which can document and evaluate the situation, draw up a plan, implement it, and then re-evaluate housing policies in the long term.

The housing crisis means these processes are urgently needed, but housing policy takes time to produce results. This means that long-term strategic planning is needed, with a combination of short-term and medium/long-term interventions to ensure access to housing as a social right and an essential good against market pressures:

- Short-term measures to bring the housing market under control and regulate the most pressing issues, such as establishing oversight over trends in property prices and rents, protecting primary residences and low-income groups, restricting the diverting of the housing stock into tourist activities, and limiting speculative investment.
- A shift from cash subsidies to more permanent in-kind solutions, such as the creation of a stock of low-rent social housing managed by local, municipal or non-profit agencies.
- Measures that will aim at better utilizing the existing stock through the re-use of vacant buildings, a comprehensive framework of compensatory incentives for the long-term leasing of underutilized housing, and the allocation of public property - land or plots - to cover social and affordable housing needs.
- Environmental upgrading of the housing stock with the cost fairly distributed, socially-just property taxation and measures to combat the displacement of residents.
- Balanced support and protection for owner-occupiers and tenants, with particular attention paid to the most vulnerable groups, and recognition of housing as a universal social right.
- Strengthening local, participatory and cooperative initiatives alongside centralized policies, through the utilization of European programmes and financial instruments.

APPENDIX

Table 1 lists by housing tenure (owner-occupied, tenant-occupied, social rent) the main schemes and subsidies that make up the current housing policy mix, and for which public expenditure information is available through official websites, legislation and government press releases. The resulting total falls well short of the 6 billion Euros recently announced by the government ([Press Release, April 2024](#)), but nevertheless provides a relatively clear picture of the allocation of public resources for housing, which, as shown in Table 2, relates in the main to supporting owner- occupation, and far less to supporting renting, and barely touches upon social renting. It is noted that none of the recorded expenditure is directed towards the creation of a permanently affordable social housing stock under public control.

Table 1. Policies and national funding for housing programmes by housing tenure				
Category	Description	Name	Organization	Public expenditure
Policies for owner-occupiers	Subsidised loans	My Home I	DYPA	750,000,000 €
		My Home II	RRF + Greek State	1,000,000,000 €
	Energy upgrade subsidy	I Save Energy 2025	RRF	434,000,000 €
		I Save Energy for Young People	DYPA + RRF	300,000,000 €
	Renovation subsidy	I Renovate, I Rent Out	Min. Social Cohesion & Family	50,000,000 €
		I Upgrade my Home	RRF + Greek State	400,000,000 €
	Tax exemptions	Three-year tax exemption from rental income	National Economy	230,000,000 €
		Tax exemption for the purchase of a first home	National Economy	-
	Loan instalment subsidy	Vulnerable households	Min. Social Cohesion & Family	3,000,000 €
Policies for tenants	Rent subsidy	Housing benefit	Min. Social Cohesion & Family	280,000,000 €
		Housing assistance allowance for uninsured senior citizens	Min. Social Cohesion & Family	2,357,000 €
		Student housing allowance	Education	15,000,000 €
Policies for owner-occupiers and tenants	Heating subsidy	Heating Allowance	National Economy	270,000,000 €
Municipal social housing programmes	Supported rental housing	Housing and Work	Ministry of Social Cohesion & Family (YKOISO)	15,000,000 €
		COVER	DYPA	21,000,000 €
	Social housing for the most vulnerable groups	City of Athens	RRF	1,032,114 €
		Municipality of Thessaloniki	RRF	610,514 €
Total public expenditure (2024-2025)				3,771,999,628 €

Sources: legislation, government websites and news websites (accessed July 2025)

Policies by housing tenure	Total category expenditure	Percentage of total
For owner-occupiers	3,167,000,000 €	83.96%
For tenants	297,357,000 €	7.88%
For owner-occupiers and tenants	270,000,000 €	7.16%
For municipal social housing programmes	37,642,628 €	1.00%
Total	3,771,999,628 €	

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- 8 The appropriateness of the metric has been called into question, as it does not take into account income levels, local housing market conditions and the particular needs/features of individual social groups. Qualitative, non-analytical approaches have been proposed as alternatives, which focus on whether the residual income available allows for a dignified life. Indicatively, this is defined by the European Commission of Social Rights as "the ability of a household to cover the *initial cost, rent and related expenses in the long term, while maintaining a minimum level of decent living standards*" (Dunja Mijatovic, 2020, [The right to affordable housing: Europe's neglected duty](#), Council of Europe). Of course, these approaches need to be adapted further to national and local contexts, and integrated into operational policy definitions. (See Marietta Haffner and Kath Hulse, 2019, [A fresh look at contemporary perspectives on urban housing affordability](#), *International Journal of Urban Sciences*).
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⁵² <https://www.greeceinfofigures.com/golden-visa/>.

⁵³ Tourist accommodation for short-term rental has continued to grow year on year, mirroring a pan-European trend. In August 2024, 232,841 properties and 1,022,633 beds were recorded, while the data for the first quarter of 2025 show a further increase (INESTE, [Statistical Bulletin n. 103 \(in Greek\)](#), June 2025). Overall, overnight stays in Greece increased by 34% in period 2019-2023, breaking down to 23% in Attica, 17% in Crete, 15% in the Cyclades and 13% in the Ionian Islands, followed by the rest of the regions (INSET, [Greek Tourism Report 2023 \(in Greek\)](#), December 2024).

⁵⁴ Dimitris Balampanidis, et al., 2021 (op. cit.).

⁵⁵ Foreign investment relating to real estate - property management and private real estate purchases and sales - quadrupled and quintupled in a decade, rising to a cumulative 44% of foreign investment (Bank of Greece, 2025, [Net non-resident foreign direct investment in Greece by sector](#)) (in Greek). The demand for Golden Visa, despite successive increases in the monetary requirements, continues to grow, with 17,791 active permits as of January 2025 (Greek Department of Immigration, [Legal Immigration Data, January 2025](#), in Greek).

⁵⁶ Law 5006/2022 (Government Gazette A 239 - 22.12.2022) "My Home - Housing Policy for Young People, Utilizing Public Property for Social Housing... and other provisions" established four new funding programmes along with a Public-Private Partnership (PPP) mechanism for the production of affordable housing. Specific programmes include: "My home" which provides loans with subsidised interest to young people aged 25-39; "I Renovate-I Rent Out" which finances part of the cost of repairing closed properties on condition that they are rented out for three years; "Cover" which subsidises the rent for three years of young people aged 25-39 who are beneficiaries of a Minimum Guaranteed Rent in dwellings previously rented under the ESTIA programme"; "I Save Energy-I Renovate for Young People", which subsidises energy upgrades and housing renovations for housing owned by young people aged 25-39; and "Social Antiparochi" which establishes partnerships between public entities and private contractors for the construction of new housing on publicly-owned properties, part of which will subsequently be made available to beneficiaries at below-market prices.

⁵⁷ The only long-term housing benefits implemented with stable funding from national resources are the "Housing Benefit" (since 2019, a rent subsidy of 70 to 210 euros given to around 270,000 low-income households per year); the "Housing Benefit for Uninsured Senior Citizens"; the "Student Housing Allowance"; and "Housing and Work for the Homeless" (since 2015, with a call to municipalities every two years, involving about 600 households per year).

⁵⁸ According to press releases from the Hellenic Ministry of Social Cohesion and Family([2/4/2025](#)), housing policy expenditure in Greece amounts to 6.5 billion via 40 different programmes. No breakdown of this amount is provided, however, even on the recent [Housing Policy Portal](#). The Appendix provides a table detailing all the different programmes and grants included under housing policy for which public expenditure information is available through official government websites, legislation and press releases.

⁵⁹ A number of studies highlight the need for the public sector to play a more active role in the production, distribution and regulation of housing in the face of the speculative drivers of the market. The challenge is to de-commercialise a significant part of the housing stock, so that housing is effectively recognised as a right and a basic social good. In this context, it is proposed that social housing be perceived as infrastructure and a needs-based capital investment, that financing and taxation are based on public and social value, and that targeted public investments are made. See, indicatively: Lawson, J., Denham, T., Dodson, D., Flanagan, K., Jacobs, K., Martin, C., Van den Nouwelant, R., Pawson, H. and Troy, L (2019) [Social Housing as Infrastructure: rationale, prioritisation and investment pathway](#), Final Report No. 315, AHURI, Melbourne; Mazzucato M. and Farha L. 2023, [Right to Housing: A Mission-Oriented and Human Rights-Based Approach](#), Council on Urban Initiatives. UCL Institute for Innovation and Public Purpose, Working Paper Series.

⁶⁰ In recent years, most of the funds available for housing have come from European funds (NSRF, CIF). However, unlike other countries in the European South, Greece has not made use of the Next Generation EU/ RRF for social housing, with the exception of a single [small EUR 1.6 million pilot project](#) for the renovation of 100 houses in Athens and Thessaloniki. The vast bulk of the funds have been directed at energy upgrades ("I Save Energy") and subsidised loans ("My House 2"). Increased resources will be made available in the years ahead through the European Affordable Housing Plan, the reform of the Structural Funds, and the [Social Climate Fund](#) (250 million for social housing in the Greek plan). The question is whether these will be employed exclusively in support of the market and the private sector, as they are today, or whether they will support public/municipal entities and the gradual creation of a permanently affordable housing stock.

⁶¹ For a more extensive critique of Social Antiparochi, see [stakeholder comments on the consultation for the recent amendment](#) (in Greek).

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⁶³ Of course, there are also critical approaches to densification policies that fail to take into account the "gentrification" they may bring about, Rebecca Cavicchia, 2023, Urban densification and exclusionary pressure: emerging patterns of gentrification in Oslo, *Urban Geography*, 44(7), 1474-1496, <https://doi.org/10.1080/02723638.2022.2100174>.

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Spreading Innovation: A case study on acceleration within the startup ecosystem of Greece, a Diaspora Nation

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Abstract

Startups do not operate in a void and institutions in their direct environment impact them. This working paper is a first in depth field research of a single accelerator in Greece, a country that is relatively lacking in international rankings for innovation and competitiveness. We chose to focus on MIT Enterprise Forum Greece (MITEF Greece, 2015-2022), the only accelerator in the country to be linked to an international university. We used a mixed qualitative and descriptive statistics methodology. Our main findings are that its accelerated startups and their founders stood out in the startup ecosystem in the following ways: founders were a mosaic of local and Diaspora Greeks as well as non-Greeks, startups had a global reach, with a presence in 20 countries and an impressive share in deep tech processes and sectors, thus enhancing substantially the geoeconomic reach of the Greek startup community. Indicatively among the top sectors medicine- life sciences, environment-energy, and technical solutions-robotics stood out from the beginning although this sectoral composition was not usual among startups in the Greek ecosystem especially before 2019. In a nutshell, MITEF Greece accelerated startupper stood at the cutting edge of the nexus of innovation and internationalization in the Greek startup ecosystem.

How was this made possible? We put forward the hypothesis that this outcome was attained as a result of the following multiple factors: the dedication; high expertise; open mindset; heritage of a culture of trust, reciprocity and strong sense of community ("μτζι") of the Greek MIT graduates (local, brain drain and Diaspora), who were running MITEF Greece; the careful selection process of startups accepted in acceleration programs; the ample business and technological know-how resources available to MITEF Greece by the vast global MIT entrepreneurship community and its enthusiastic pool of Diaspora Greeks in the USA who were involved in the accelerator and its offspring The Hellenic Innovation Network.

Although the case of MITEF Greece cannot be exactly replicated, we believe that it offers useful insights for minimizing the disintegration and lack of communication between support organizations and policies for the startup ecosystem. It is an extraordinary example of actively enhancing internationalization of innovation through commercialization of research results, an important GIFT for Greece at a time of rising deglobalization and global economic fragmentation. This is the ultimate lesson derived from this case study.

1. Introduction

From the late twentieth century onwards there has been a growing public and academic interest in startups. They are perceived as exciting emblems of entrepreneurial innovation and the fourth technological revolution and startupper have acquired a "heroic status" by society. This fascination is not unwarranted; not least because although we live in an era of geoeconomic fragmentation, the global startup ecosystem is built on multiple channels of interconnections evolving into a common culture/language of communication. But of course, not all countries' startup ecosystems have integrated equally into this new global "superorganism ". Greece, a newcomer to the world of startups has a dynamic ecosystem, but it lags behind in its integration into the global startup ecosystem.

Pointedly, one of the key questions that has emerged in the Greek public sphere is if and how this ecosystem can play a leading role in the desired transformation of the existing national production model from inward-looking into internationally competitive production/firms fueled by world class innovation (Axaroglou, 2024 and Kathimerini Newsroom, 2025). It is within this context of the need to understand better and enhance the globalizing of innovation, that we have written this explorative study on MITEF Greece, an accelerator born in the deep phase of the recent(2009-2019) long economic crisis. (See Box 1). **We research in depth the structure, strategy and culture whereby this support organization and its accelerated startups enhance the geoeconomic presence of the local ecosystem abroad. We strive to present insights as to how this example may be useful for stakeholders in the wider Greek startup ecosystem¹.**

Box 1: A transformative path: From the creation of MITEF Greece to its transformation into StartSmart Southeastern Europe

MITEF Greece was created in 2013 and started operating in 2015 (the difficult year of imposition of capital controls) as a chapter of the accelerator MITEF Global. It was active until 2022 (the final year of the COVID-19 pandemic).

The evolution of MITEF Greece from 2023 onwards into: StartSmart Southeastern Europe is a marker of its success. As its name denotes, it has a larger geographical scope, making it the only accelerator in Greece to have such a feature.

We are the first, to our knowledge, to undertake an in depth field research of a single startup accelerator in Greece. Our perspective gives center stage to the nexus of innovation and internationalization, an issue of crucial importance for Greece, while also focusing on the role of the Diaspora (including the recent post-2009 brain drainers). It is important to point out that up to now, research on the topic of startups is mostly of a general scope concerning the charting of general characteristics of startups at a national or meso level (i.e focusing either in certain sectors, geographic locations) and without or little reference to their origin whether locals –Greeks or brain gainers- or Diaspora (including brain drainers), or foreigners. (For a presentation of the existing literature on Greek startups and the ecosystem and the areas of expertise we consulted for our analysis, see: Appendix 1.)

From the start of our field research, our aim was to put forward a claim for an alternative yet also complementary path of research, that of the proliferation of case studies, each focusing in depth on an individual support organization. We believe that in combination with the existing broad based literature, such a specialization will: enrich our knowledge of the startup ecosystem; enable more informed policy measures; enhance the sharing of information and collaborations among support organizations. Each one of the latter has its signature mission, character, path and knowledge resources, and collaborative activities may enhance the dynamism of an ecosystem which since its inception stands as a fragmented whole.

We chose to focus on MITEF Greece because of its following features: It is the only startup support organization in the country to be related to a foreign university. Moreover, MIT with which it is affiliated, is a renowned institution of excellence in science, innovation and business studies, while also standing at the center of a vast global entrepreneurial ecosystem far greater than that of any other university. MITEF Greece has also a large involvement of Diaspora Greeks and has accelerated 250 startups, at a time when the total number of estimated startups in Greece was well under 1000. Let it be noted here parenthetically that its successful affiliation to an academic institution by itself is especially useful at this conjuncture - for the reason that in spite of the recent creation of a legal framework for spinoffs from Greek universities (Law 4864/2021), such entities face constraints that impede their extensive involvement in the local startup community.

Regarding our research method: we map the outcomes of MITEF Greece, on the basis of a database we have constructed, containing detailed demographics for 169 out of the 250 accelerated startups (plus their 312 founders). Our main finding is that MITEF Greece accelerated startup(per)s were a mixture of local, brain drain and Diaspora Greeks (plus a few foreigners), who stood at the cutting edge of the nexus of internationalization and innovation within the Greek startup ecosystem. Given this successful outcome, we proceeded to ask how was this made possible?

In order to answer this question, we held interviews with stakeholders of MITEF Greece and studied its published material. As a result of this research, we reached the conclusion that this outcome was related to two equally important factors: The immense global presence and unique heritage and resource combination offered by the MIT academic and entrepreneurial ecosystem, in which the accelerator was embedded and the fact that inspired Greek MIT alumni initiated the creation of MITEF Greece and undertook its operation.

Although the case of MITEF Greece cannot be replicated in the local fragmented startup ecosystem, the study of this organization's method, mindset/values and outcomes is of high significance and wider relevance as it provides information and insights useful for researchers; for startupper on their journey; for accelerators; for universities; for Diaspora Greeks, brain drainers, non-Greeks who wish to invest in the local startup ecosystem or become startupper; and for local and European policy makers. It is worth mentioning that the development of a closer relationship between markets and innovation has been in the public dialogue for quite some time, especially given the fragmentation of global trade in key technologies.

This working paper is organized from this point onwards as follows: Section 2 follows, providing in brief aspects of the wider context: Namely, important aspects of the Greek economy; the innovation- internationalization nexus with reference to startups; thirdly a short presentation of the Greek startup ecosystem. Section 3 focuses on outcomes: it analyses in detail the demographic features of the accelerated founders and startups, while emphasizing those reflecting the level of innovation and international competitiveness. Section 4 analyses the organization, principles and multiple resources of MITEF Greece. Section 5 offers thoughts on policy, a summary of our findings and presents the direct impact of MITEF Greece.

2. Facets of the Wider Context in a nutshell

2.1 A brief overview of the Greek economy: A high income country at a critical crossroad

Startup ecosystems and support organizations do not operate in a vacuum, therefore taking into account the socioeconomic environment in which an accelerator was born and operated in, is of critical importance. For MITEF Greece, this environment is that of a high income country at a critical crossroad. At the moment, (as already noted in Section 1), there is a growing urgency for a radical orientation of the “production model” of the country towards “re-industrialization”, with an emphasis on deep-tech innovation and international competitiveness.

Historically, Greece has been a latecomer to modern economic growth, following import substitution industrialization (c. 1920-1939 and 1960s to mid 1970s). At the peak of the latter part of this “industrial revolution” the share of industry in GDP reached a mere 23.3% in 1971 and 1976 (Louri & Pepelasis - Minoglou, 2001). Shortly thereafter, by the early 1980s, without the country having ever reached the status of a “mature industrial economy”, a prolonged de-industrialization started. The latter became deeper with the onset in 2009 of the long economic crisis, during which there was a long downward spiraling of Greece’s position in global rankings of GDP per capita.

In particular, in 2024 Greece ranked 50th in the world in terms of GDP per capita (The Global Economy.com, 2024) a far cry from the higher position it held 2000’s. ² During the crisis, the relative purchasing power of Greeks fell back to the levels of the 1960s, from 14.7% behind the EU average in 2009, to 34.3% below average in 2009 (Matsaganis, 2013). However, in spite of this, Greece remains in the cohort of high income countries and at the moment there are indications that recently a cumulative reversal of the falling trend is in place.

It is interesting that during the crisis the Greek innovation system “resembled those of upper-middle income countries rather than [its] high income peers” (Vetsikas & Founta, 2025). According to the global innovation index (GII), in 2024 Greece ranks 38th among the 51 high income economies. (World Intellectual Property Organization, “Greece ranking in the Global Innovation Index 2024”). Notably, the score of Greece is below that of high income countries in all seven pillars of the GII index, and also below the average of Europe, with the exception of the pillar of human capital and research (World Intellectual Property Organization, “Benchmark of Greece against other economy groupings for each of the seven areas of the GII Index”). A recent positive development in the country’s innovation system, is the announcement of the creation of an AI Factory, further elevating its status as a startup and innovation hub, as well as strengthening the European Union’s innovation capabilities as a whole (See Box 2).

Box 2: A recent positive development: European recognition of Greece’s innovation potential

Europe’s strategic plan in 2025 to become a power house in AI, in practical terms, has acknowledged Greece’s research and human capabilities and has selected it to create one of the seven AI factories to be built in Europe. It will go under the name «Pharos – The Greek AI Factory for accelerating AI innovation», and will be based in the Lavrion Technical Park and will be powered by the supercomputer Daedalus. This project will further elevate Greece’s position as an innovation and startup hub with cross border interlinkages from the research to the implementation phase (CORDIS, European Commission, 2025)

Greece’s performance in international competitiveness is also in a low position. Specifically, in the global competitiveness index Greece was 47th among 67 countries in 2024 (International Institute for Management Development, 2025). A reflection of this low score in competitiveness is the widening trade deficit and high dependence on imports (Hellenic Republic & Hellenic Statistical Authority, 2025). This structural weakness is combined with an above average level of economic globalization. ³ The latest economic globalization index (2022) is at 78.26 points, far above the world average of 59.16 (on the basis of data from 184 countries) (The Global Economy.com, 2022).

A variable combining both elements of the innovation -internationalization (competitiveness) nexus is the “linkages dimension” listed in the Innovation Scoreboard published annually by the European Commission. The linkages dimension “includes three indicators of innovation capabilities as it “measures”: collaboration efforts between innovating firms, research collaboration between the private and public sector, and Job-to-job mobility of Human Resources in Science & Technology” (European Innovation Scoreboard, 2024). It is of interest to examine Greece’s performance regarding this indicator.

“Between 2023 and 2024, the EU average dropped by 11% whereas Greece (-35%) experienced one of the strongest declines.” It is noteworthy that Greece’s performance has been steadily declining since 2017, with a further decline of 8% in 2024, bringing Greece in the 18th place compared to other EU member states (European Innovation Scoreboard, 2024). **This intensifies our assumption that the innovation ecosystem in Greece lacks connection and networking opportunities between firms, public and private sector and individuals, and efforts to reverse this situation are needed.**

In sum, a vital question posed in the public arena today, is how Greece can transform its production model. Much will depend on the future direction and dynamism of the innovation-internationalization nexus. The latter (we may add) requires the Diaspora to reclaim its historic role as instigator and mediator for economic and institutional change and for the startup ecosystem to play a stronger role in this process. Before turning to the facts pertaining to the record of MITEF Greece’s outcomes (Section 3 of this paper), it is important to divert briefly into some thoughts and facts on the innovation-internationalization nexus (Section 2.2) and a concise presentation of the Greek startup ecosystem (2.3).

2.2 General comments on the innovation-internationalization nexus

We delve below briefly into the generalized mechanics, history and present of the innovation- internationalization nexus followed by relevant comments on the Greek Diaspora.

First, innovation is a complex process; a phenomenon interacting, and in part reflecting the environment in which it materializes. It does not occur in a vacuum (Estrin, 2008). Nevertheless, its process has been conceptualized in a potent abstract form as:

Invention x Commercialization = Innovation (Dikaiakos, 2016, 2023).

Second, historically three facts have been the case (which are not predominant today): The time path from invention to innovation was longer; commercialization was predominantly a phenomenon grounded in the local environment; internationalization when it occurred was an outgrowth of commercialization, therefore not so fast (and of course not automatic). In addition, all three components of the equation’s actions were predominantly driven by individuals.

Third, zooming in on the innovation- internationalization nexus in the world economy, it notably has evolved in a number of ways: at times either both elements moving forward or innovation moving forward alone in a climate of de-internationalization (Cameron & Neal, 2002; Caron, 2005). Since 2009, increasing global geopolitical fragmentations and intensifying trade antagonisms are increasingly challenging the post WWII exponential growth of multiple cross borders supply chains and channels of cooperation; as well as the transfer of knowledge among diverse geographical and cultural spheres. Innovation since WWII had been built on this edifice of global interactions and interdependencies; and now this edifice is being challenged.

Fourth, innovation in our times is no longer the prerogative of corporations as was the case at the height of the golden era of the twentieth century. Instead, a more complex innovation ecosystem has emerged: “nurtured by “interactions between companies (including startups) and their surroundings, be they universities, government agencies, export organizations and others, [the latter being].... important in providing information, competence and opportunities also play significant roles” (Joerg Baten, 2016).

Fifth, with regard to national startup ecosystems, these have evolved with a particular dependence on the smooth operation of the aforementioned global exchanges. Each one of the processes in the innovation equation (Dikaiakos, 2016) are highly dependent on the efforts of teams composed of individuals or institutions, which are dispersed across different countries.

Having presented the five points above, it is clear that the innovation internationalization nexus is a complex process, which, in order to be impactful, requires that the principles and networks of trust be at the core of all relations. Here, parenthetically, we can add that in the Greek case, repeatedly in modern history, its global academic and entrepreneurial Diaspora, through its trust base, has played a significant role in initiating and facilitating innovations, including disruptive ones (Pepelasis et al., 2022).

Box 3: Interesting facts on the Greek Diaspora from past to present

Among diverse global Diasporas, the Greek is known for its spiritual and emotional attachment towards the homeland. This has materialized either from afar or even through NOSTOS: return to the homeland -repatriation. A concept going back to antiquity, the emblematic figure in this process being Odysseus and his long return journey to Ithaca.(E. Kyriakidis, interview, June 24, 2025, S. Bakalis, interview, August 20, 2025 and I. Petropoulos, interview, August 1, 2025)

Throughout the history of the Greek state, the Diaspora has played a seminal role in shaping the forefront of its socio-economic status since the beginning of the Greek War of Independence (1821). (Pepelasis et al., 2022; Pepelasis & Varvaritis, 2016; Bitros & Pepelasis Minoglou, 2007)

They have always been transmitters of new ideas, institutions, business knowhow, as well as capital and acted as intermediaries for the drawing of foreign funds to the country. What is different today is their much larger presence in scientific research and thus they have acquired a "new role ".

A missing link in this story is the presence and impact on the fastly evolving Greek startup ecosystem of the Diaspora in synergy with the leading academic institution in the global startup ecosystem.

In order to grasp the resources of the Diaspora today, it is enough to mention that the population of Greece at the moment is 10,4 million people and that of the Diaspora is 6,5 million; no wonder it is often described as a Diaspora Nation. The Diaspora is dispersed in 140 countries but the USA is the number one country in terms of its share (over 50%) in the total population of the Diaspora and Europe follows with a little over 23%) (Wikipedia.org, 2020; Hellenic Parliament Website, n.d.).

As Panagiotis Karampinis has pointed out, Greek-founded startups within the country are valued at approximately €12 billion. In comparison, startups founded abroad by members of the Greek Diaspora are estimated at over €150 billion" (Endeavor Greece, 2025 and Wikipedia.org, 2020)

One final general comment relating to the first and fifth points above before closing this section: Innovation is central to startup ecosystems and depends inherently on invention as a preliminary first step. The latter is transformed into a marketable, innovative product through commercialization, which in our era has been synonymous with internationalization, as the existence of multiple channels of trust, cooperation and transfer of knowledge among diverse geographical and cultural spheres (in which parenthetically the Diaspora has a long expertise as already noted above). With this last comment and the hope that the Diaspora comes to play a stronger role in the startup ecosystem, we turn to the basic contours of the Greek startup ecosystem, the country's new business frontier.

2.3 Basic contours of the Greek startup ecosystem

The inception of the international startup ecosystem dates back to the 1950s-1970s in Silicon Valley (USA). The Greek startup ecosystem was born circa 2009/10 at the beginning of a long multifaceted economic crisis as a result of both long and short-term factors(Pepelasis, Protogerou, 2018). The basic components of the ecosystem are the startups and the diverse organizations supporting them, however at the time of the birth of the startup community, the support organizations were almost non-existent, but were later on developed, and matured together with the ecosystem itself.

Estimating the number of startups founded is not easy, primarily because it is difficult to identify them (as most are at an early stage of development) and there is no standard definition of what a startup is (among the various organizations supporting the startups, researchers, academics, new company founders). As a result, there does not exist an all-inclusive list of startups enjoying unanimous approval by all stakeholders. At one extreme is the perception that all newborn firms are startups, and at the other extreme are those who consider as startups only those young entrepreneurial initiatives that are strictly defined as deep-tech. Up to now the basic reference sources for an estimation of the number of startups in Greece are the lists of startups which have received services from incubators and accelerators, as well as those listed on the national registry of startups, Elevate Greece. The latter was established in 2021 and it provides information from then onwards of the segment of startups registered with it. There is some overlap in the data provided among all the aforementioned lists as some startups appear in more than one source.

Indicatively, the three available estimations of the size of the startup population which provide the most detailed information, refer to specific points in time and their chronology appears to have some gaps. Nevertheless, they are useful in the absence of an inclusive, universal and consistent measuring of the startup phenomenon on a national scale. The picture which emerges from these three sources is the following: 1) The number of incubated startups that had been founded between 2010 and 2016 in Athens (the near exclusive center of startup formation at the time) were 300 (Besis, Pepelasis, Paraskevas, 2023).

2)The number of active startups was estimated for 2021 somewhere in the area of some 1,000 plus and apparently in early 2025 informed observers/stakeholders count it in the area of 1,400. (Elevate Greece website registry, selected dates; Pepelasis, Spyropoulos et al., 2022)

For a brief overview of the evolving support organizations in the Greek startup ecosystem, see BOX 4 below.

Box 4: A brief overview of the support system of the Greek startup ecosystem
These support organizations and financing initiatives have been created by a mélange of actors, like for example: banks, universities, municipalities, business associations, foreign embassies and individuals.
Support Organizations
The year of creation of MITEF Greece, 2013, coincided with the start of a two year wave of creation of organizations supporting startups, which included: ⁴ The EGG, Aephoria.net ID-GC, Orange Grove, IQibility, TH.E.A. Ekinisi Lab, Innovathens. By 2022 (the end date of our study), Greece counted 37 accelerators that target already established startups to help them connect with the markets. Other actors have appeared in the startup scene, including Science Parks (as for example Thessaloniki Technology Park, Crete Science and Technology Park) , affiliated with a University of Research Center, plenty of co-working spaces offering networking and collaborations opportunities⁵. In parallel to the aforementioned developments has been at the proliferation of innovation Clusters (as for mi-Cluster, g-Cluster, Hellenic fintech cluster) (Elevate Greece website, 2024), which consist of innovative startups or other companies or research organizations working to stimulate innovative activities in the country.
Financing Initiatives
It has been estimated that 83.5% of entrepreneurs used personal capital as a source of finance for their business idea (Koulouris, 2022), while many more collaborated with family and friends to finance the first stages of their business. However, as the Greek startup ecosystem is forming and maturing, other forms of investment such as Angel investors and VCs are more and more common. Angel investment in particular has risen by over 200% from 2010 to 2020 in the number and the sums that business angels invest (Koulouris, 2022). In addition, 16 Venture Capital foundations are present in the country. In the financing of Greek startups, the role of EU funding projects is especially important.

Apart from the initiatives mentioned above, there have also been important initiatives undertaken abroad by the Diaspora (and not all part of the MIT ecosystem) that direct some of their activities towards the local Greek startup ecosystem and innovation. These include: the Hellenic Initiative⁶ the non-profit mobilizing the Greek Diaspora and Philhellenes to support the long term growth of Hellas (in their terminology); The Circle of Hellenic Academics in Boston⁷ which sets among its missions “Interacting and cooperating, as appropriately, with Institutions and Organizations espousing Hellenic interests”.

An interesting recent development aimed at enhancing the presence of the Diaspora in the startup ecosystem, is the under construction design for “...the establishment of a Strategic Plan for Greeks abroad” initiated by the Greek Ministry of Foreign Affairs. Among its goals are “...the active integration of the knowledge, experience and innovative potential of the diaspora” (Begakis et al., 2025).

In a nutshell, the young Greek startup ecosystem is evolving but is still relatively small, ranking 47th globally. Athens stands 117th among global startup cities (Startupblink website, n.d.). It has 5 unicorns (Giorgos Kourkoutas, 2021) and it is continuously growing and becoming more mature. In spite of a low ranking in terms of its size and structural problems, its further development appears promising, both in terms of the quality and size of its startup population and of the startup support organizations.

To recapitulate, Section 2 has provided critical features of the wider local context in which MITEF Greece was conceived and operated. We outlined the relatively backward position of Greece in innovation and international competitiveness, and the recent promising signs of moving forward. We have presented the basic contours of the innovation- internationalization nexus as presented in the international literature, and have underlined the culture and legacy of relations of trust underpinning the Greek Diaspora, which as we will see in Sections 3 and 4 held an important role in this initiative. Section 2 ended with a short description of the Greek startup ecosystem, in which we mentioned the diverse (but still not large) presence of the Diaspora within. Upon moving to the core of this working paper (Sections 3 and 4) which present our findings, we would like to underline that we have based our analysis on the precept that structure of organizations-and even the structures of networks matter and are intimately interconnected with culture. Structures as living organisms can be flexible and can accommodate for "like minded" external organisms; in this case the Chapter of MITEF Global in Greece being a creative intermingling of the MIT and Greek Diaspora heritages. (Vander Ark, 2017)

3. MITEF Greece Founders and Startups: Findings from our constructed statistical database

In this section, we analyse the results of the first research pillar of this working paper: The mapping of the outcomes of MITEF Greece on the basis of our constructed demographics data base on accelerated startup(per)s.

3.1. Construction of data base and method of analysis

At the core of our database, is a comprehensive excel which contains information on a total of 169 alumni startups (and their 312 Founders) hosted by MITEF Greece in the annual competitions during the seven- year period 2015-2022, who through the years had maintained contact with MITEF Greece. The information we researched consists of a mixture of data provided directly by MITEF Greece and its website; data available on the websites of participating startups, startupper's LinkedIn profiles and other social media accounts, but also on Elevate Greece. We have also analyzed information drawn from the 40 completed questionnaires (through google form), emailed to the 187 founders for which MITEF Greece had current email addresses (See also Appendix 2). Therefore, the accuracy of the data depends on the accuracy of this information. During our research, collection of data proved difficult, as it is a hurdle universally faced when studying an early-stage startup ecosystem.

At this point a few disclaimers are required. The first is of a general nature: When studying startup(er)s per accelerator, we faced the issue that often startups pass through more than one accelerator competition- i.e. acceleration programs, there can be no exclusive influence of one accelerator, in this case MITEF Greece.

The second disclaimer, which concerns the database we have constructed (and has formed the basis for all the tables and diagrams in Section 3.2. and 3.3), is that the number of observations per variable in some cases was quite low.

The third disclaimer is that our sample consists of startups that made it through MITEF Greece's selection process, and which remained as alumni in contact with the organization throughout the years. It can rightly be assumed that these startups are perhaps more active, innovative, more competitive and already show potential to upscale. Possibly our findings would have been different if we had studied the 80 alumni accelerated startups, for which we have no information and which did not remain in contact with the support organization. It is noteworthy that among the 169 startups only 25 were not alive in 2023, when we collected the data for this paper and this is a survival rate which is exceptionally high; perhaps those alumni startups which maintained contact with MITEF Greece were as a result better commercialized.

Our database is divided into two subsections: founders and startups. In total it contains information for 23 variables, but for the purposes of this paper we have analyzed 17 of the variables (5 of the founder variables and 12 of the variables for startups, as we have largely focused on those variables reflecting innovation and internationalization. (See Sections 3.2 and 3.3) In addition, our questionnaire was very useful in providing insights in particular in relation to founders and we present the most relevant of these at the end of Section 3.2.

We have also made a first attempt to gauge differences in characteristics between the population in our sample and those of other data sets covering Greek startup(er)s. A summary of this provisional exercise is discussed in Section 3.4 and the more analytical results are presented in Appendix 3.

Finally, we must mention two methodological issues we faced. The first as mentioned already briefly above concerns a weakness: due to the lack of detailed information on startups it was not possible to have a complete maximum number of observations for all variables. The variables with the largest number of gaps in information are in the startup category: funding received (only 18 observations), branches abroad (only 39 observations), exports (only 43 observations) and legal form (only 44 observations). The second methodological issue concerns what we consider a strength of this working paper: In the analysis of our founder and startups data, we have placed emphasis on a perspective based on the internationalization- innovation nexus, and in addition we have tried to uncover the extent of Diaspora presence and influence within this organization.

3.2 Presentation and Analysis of Data on Founders

Recent literature has discovered the founders' personality as one of the main drivers of a startup's success, pointing out specific characteristics within a person but also within a team (Aryadita et al., 2023; Freiberg & Matz, 2023). Therefore, our analysis of the startups accelerated by MITEF Greece would not be complete without an analysis of the profile of their founders. These individuals are often the driving force, contributing a high educational level and experience in business and academia, and pushing for high innovation products. Some of them seem to have connections with the Greek Diaspora or foreign innovation systems.

Our analysis of accelerated startups yielded a sample of 312 founders for which we have compiled data for a total of 5 variables, including nationality, place of residence, age, gender and educational level. Some of these, (in)directly reflected the level of internationalization and innovation of these companies. Data were also supplemented by the information gathered during our stakeholder interviews and questionnaire.

Nationality and place of residence

First, looking at some key demographic factors, we examine the nationality and place of residence of founders. This indicator is highly affected by the international appeal of MIT, as an academic institution. While the majority of the founders (67%) are Greeks living in Greece, we cannot ignore the great percentage of Greeks living abroad (20.33%) and non-Greek founders living abroad (9,87%), and non- Greeks living in Greece that represent only 2% of the total sample. As an accelerator operating in Greece, it is natural that the majority of the founders are residents of the country; however, the presence of foreigners or Diaspora Greeks cannot be neglected and is a testament to the organization's international profile.

In general, according to our questionnaire, most founders did not report major cultural differences within their teams but only occasional personality clashes, which illustrates the presence of an international "culture" that allows startups to work together effectively despite different countries of origin/residence.

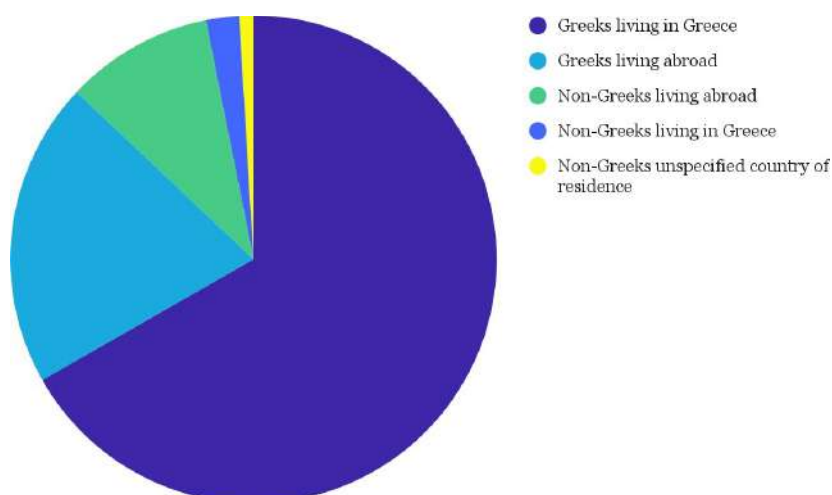


Figure 1: Founders' nationality and place of residence. (Observations 302/302)

Founders' age and work experience

We also examined the ages of founders, and observed that almost half of them (36.36%) are between 30 and 39 years old, while 34.27% are between 40-49 years old. Their age is relatively higher than the average observed in other studies of the Greek startup ecosystem, as seen in Appendix 4 and suggests that they already have some years of work experience or extensive studies. This corresponds with insights from the questionnaire in which half of those asked suggested that they had set up a business beforehand, with most of them having a long work experience -over 10 years and some over 20 years.

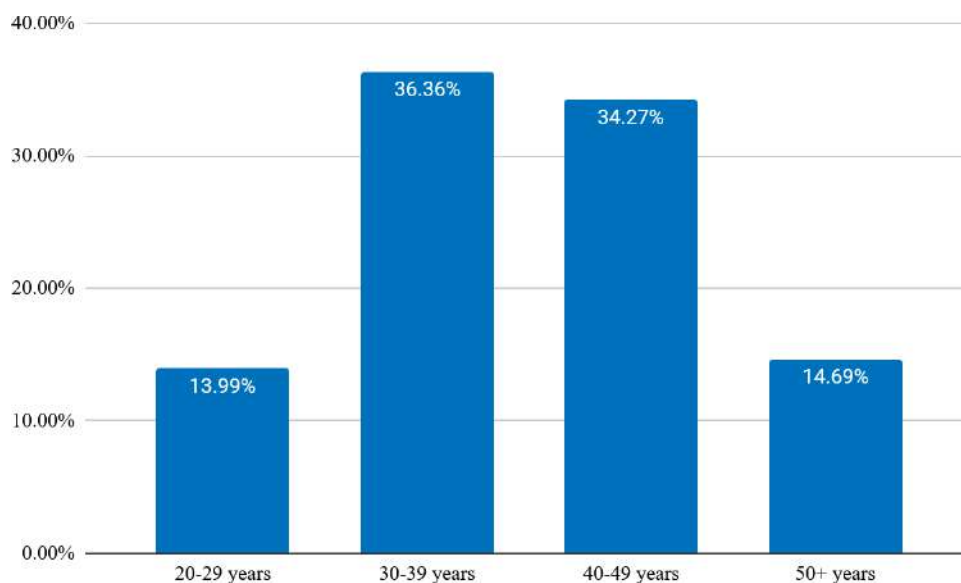


Figure 2: Founders' Age (Observations 143/302)

Founders' educational level

Educational level among founders is impressively high, as expected due to the high-tech orientation of the accelerator. Over half of them have a master's degree, (55.56% of the total sample), and almost one third (27.28%) have a PhD. Looking at the answers of the questionnaire, slightly over half had experience in academia/research before starting a startup. This correlates with the accelerator's orientation towards innovative companies and its mission to connect research with industrial deployment.

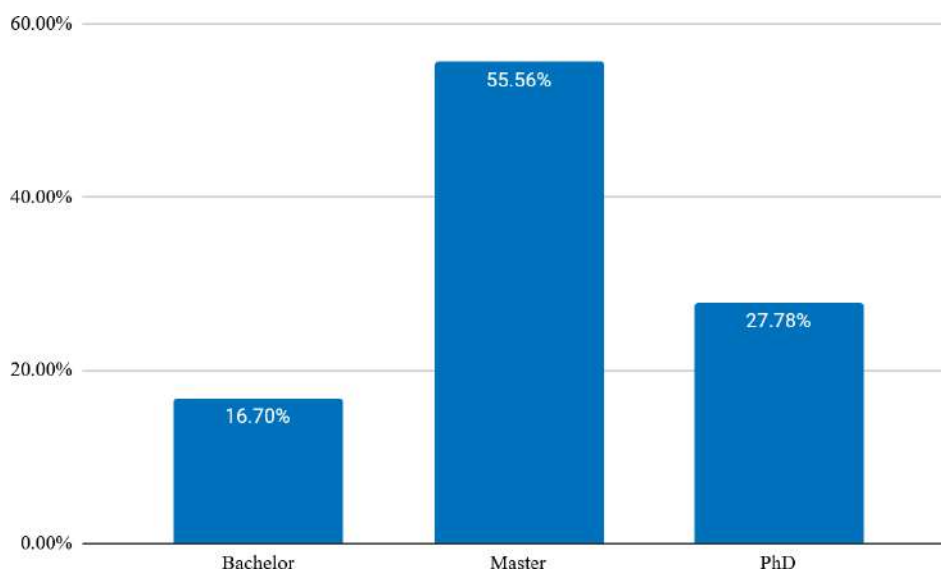


Figure 3: Founders' Educational Level (Observations 198/302)

Taking into account their age and education, we can conclude that our founders are primarily mid or late-career professionals, with extensive professional experience as showcased by their answers in our questionnaire. In most of the answers we received, founders reported over 20 years of professional and academic experience before starting their startup. As far as their occupations are concerned, they are mainly working in engineering, research and academia as well as business and entrepreneurship, therefore they are primarily working either in technical fields, providing technical expertise in their sectors, or they are in charge of the business aspect of their startup, including promoting their invention and connecting it to the market.

Founders' Gender

As far as the variable of gender, women are underrepresented in our sample, as male founders represent 85.89% of the total founders. This can be partially explained due to the lack of equal representation of women in technology-related professions and the deep-tech orientation of the MIT Enterprise Forum. It is true that such fields are often male-dominated, and a high presence of male founders is usually observed. However, in the European Union, the percentage of women founders in deep tech startups has been increasing from 7% in the early 2010s to 14% in 2021 and 2022 (Davila et al, 2024), therefore a reversal of the trend can be noticed.

In order to take a closer look at startups that include female founders, we analyzed characteristics of startups with mixed teams, both male and female founders, as only female teams represented a negligible part of our sample.

One interesting characteristic of mixed teams is that they join the accelerator later in their operation compared to only-male founder teams. Specifically, 60% of mixed team startups join the competition after 2-4 years of operation compared to 39% of startups in our total sample. To further illustrate our point, only 6% of mixed-founder teams join MITEF Greece in less than 2 years vs 53.9% of the total sample that joins before their startups reached the two-year mark. Therefore, one could support the hypothesis that mixed teams are more cautious and take fewer risks compared to male-only teams; however, further research is needed to substantiate these claims.

Comparing the findings of our constructed database with the findings of other available studies mapping out the startup ecosystem in Greece, we can draw interesting preliminary conclusions. Notably, MITEF Greece's founders are on average older and have a higher educational level, as we can see in Appendix 4.

Category	Statistics
Nationality and Place of Residence (obs 302)	Greeks living in Greece: 67% Greeks living abroad: 20.33% Non-Greek founders (living in Greece and abroad): 12.67%
Highest educational Level per founder (obs 198)	Bachelor: 16.67% Master: 55.56% PhD: 27.78%
Average Age in 2022 (obs 143)	20-29 years: 13.99% 30-39 years: 36.36% 40-49 years: 34.27% 50+: 14.69%
Gender (obs 302)	Male: 85.89% Female: 14.10%

Table 1: Founder Characteristics

Analysis of our questionnaire

We will now analyze the summary of questionnaire responses presented in Box 5, but also throughout this analysis, to understand some other characteristics of the founders. Specifically, they appear to be a select group, in which, apart from high internationalization and a great focus on innovation, a strong entrepreneurial mission prevailed. The main obstacles they faced had to do with the environment they operated in, mainly regarding lack of funding, but also time constraints and work-life balance. In our interview with founder George Boretos on 21 March 2023, he mentioned the unknown business environment as the biggest obstacle for startups in Greece and abroad.

Their inspiration is found primarily in their need to solve a problem, or to help connect research and industry, and not with personal gain. These responses raised the question on whether MITEF Greece has selected startups and therefore founders with the aim to address technological and societal problems or whether this group of individuals have specifically sought to participate in high-tech startups which were later selected by MITEF Greece.

Another important insight from our questionnaire, has been the question of cultural differences that our founders faced during the operation of their startups. The realization that, despite the high internationalization of the founder teams, the startups faced no significant issues stemming from cultural differences in their collaboration. This shows that while some differences in working culture exist, there are certain underlying common characteristics shared by founders of innovative startups allowing them to work together in an international environment. In the current period of increasing geopolitical tensions, innovation culture is becoming more universal than ever, and can prove to be a basis for international collaboration.

Box 5: Insights from our questionnaire

Sources of inspiration

Most of our founders were driven by their desire to solve a problem, to make a difference, make a positive impact on the world, but also to help bridge the gap of commercialization of research. They put collective progress first and are focused on progress and new values.

Biggest obstacles

They mainly mention lack of funding, difficulty in acquiring funding, as well as time constraints, managing to balance work with time for family. To a less extent they faced team-related issues, mainly clashes in personalities as well as difficulty in recruiting experienced employees and CEOs. They mention issues with government bureaucracy that slowed things down and uncertainty in a volatile market as well as concerns over how their product will fit into the market.

Cultural differences with co-founders

On the whole, there were no major cultural differences, in the cases who replied yes, most differences were related to differences in personality and ways of thinking.

Culture

When it comes to cultural differences between founders, both international and Greek-only teams faced similar challenges, mainly related to personality differences among the founders. Cultural differences reported were minimal (only appearing in one of the interviews), while the rest of the founders seemed to not notice differences of culture and mindset between Greek founders living in Greece, Greek founders living abroad and foreign founders.

Concluding remarks

In conclusion, observing the individuals that founded the high-tech startups accelerated by MITEF Greece, we notice patterns of a highly educated, experienced, and outward-looking sample. This further reinforces the aspect of innovation, through high educational backgrounds and work experience, or experience in academia, but also a percentage of founders coming from the Diaspora, non-Greek backgrounds, living abroad or working in international environments. These observations further reinforce MITEF Greece's outward and internationalized orientation. (See also Appendix 4).

3.3 Presentation and Analysis of Data on Startups

In this section we intend to show some particular variables of interest from our data and, using the existing literature, attempt to deduct whether the startups incubated at MITEF Greece have shown internationalization and innovation spirits. For the purpose of our analysis, we have categorized the variables of interest into two categories: internationalization and innovation variables.

Internationalization variables

In our sample (169 startups) we observe that MITEF startups have presence in 20 countries. Greece (109), Cyprus (9), UK (20) and the USA (13) are the countries with the highest number of startups.

Given the size of our dataset, we have concluded on the existence of two variables that show the internationalization of startups: the geographic dispersion of startups headquarters and branches and the existence of foreigners or/and Diaspora Greeks in the founder's team.

Geographical spread of startups.

Our main goal regarding the study of location was to gauge the extent of the international presence of MITEF Greece startups. Indeed, the data reveals an impressive degree of internationalization. This feature alone strongly differentiated MITEF Greece within the local community of accelerators-incubators.

Headquarters: Naturally, Greece was the main location of the headquarters. Yet it accounted for only 65% of the total number of accelerated startups, while the remaining 35% were dispersed abroad among a total of twelve countries.

Among the startups with headquarters abroad, the United Kingdom and the United States of America had the most notable presence.⁸ This may be explained partly by the large Greek academic and business communities in these two countries. As far as the United States are concerned there is concentration in the state of California, specifically in cities around the San Francisco Bay, due to the high concentration of technological capital or around the Massachusetts area, due to the high concentration of academic institutions including the MIT itself.

In addition, in the United Kingdom, most companies have headquarters in London due to the high concentration of opportunities both in technological capital, skilled workforce but also investment opportunities. In our analysis, a few outliers are present, having headquarters in smaller towns of the United States or the United Kingdom, or in different countries like South Africa, which could potentially be explained due to either the presence of high impact members of the team in the area, or due to the high concentration of suppliers or buyers operating in the specific sector similar to our startup. This hypothesis remains to be evaluated in future studies.



Figure 4: MITEF GREECE Headquarters Map

Branches: Information on whether a startup had a branch abroad is available for only 39 startups, (i.e. a little lower than a quarter of the total population of accelerated startups). Surprisingly, three quarters of this group were found to have a branch abroad and these were dispersed among fourteen countries.⁹ We use the word surprisingly, as due to the fact that the majority of startups are in deep tech and well connected to international customers the need for physical branches abroad might seem to be less relevant than in the past. On the other hand, because of the cosmopolitanism of the founders and the worldwide web of MIT supporting the startup ecosystem it was easier than usual to establish branches abroad.



Figure 5: MITEF GREECE Branches Map

The total number of countries in which there was a headquarter or a branch added up to a total of twenty different countries!¹⁰

As a final remark, after considering the data above, we suggest that MITEF GREECE startups have shown a more outward approach, as a result of the existence of families, high value employees and clients concentrating more in Western markets and in particular high GDP economies with advanced deep tech industries (UK, USA) or economies with a big Greek community (Greece, Cyprus).

The existence of Greek Diaspora members and foreigners

Another potential measure of internationalization in the startup ecosystem besides the geographic dispersion of startups, could be the share of startups with foreign founders or Greeks who live abroad. Baron, T., & Harima, A. (2019) in a related study on the startup ecosystem in Berlin explained that members of Diaspora and foreigners bring unique perspectives, skills, and networks which help to establish connection with broader markets and foster innovation and collaboration. Thus, we expect that the presence of Diaspora Greeks and foreigners as startup founders will signify a measure of internationalization and innovation. Out of the 169 firms we have observations about that information for 168 of them. Looking at the following graph, we observe that almost 4 out of 10 startups have a Diaspora-Greek or a foreigner as part of the founding team. Although the data suggest that the majority of startups comprises solely of Greek residents, the involvement of Diaspora Greeks or foreigners is still impressive, and a testament to MITEF Greece's internationalization.

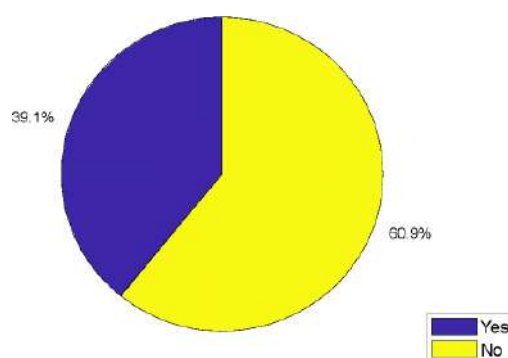


Figure 6: Share of startups with a Diaspora Greek or foreigner founder (Observations: 168/169)

Innovation variables

This part of our analysis concentrates on variables that show the innovative spirit of startups. Given the limitations of our dataset, we have concluded that four variables can explain the highly innovative nature of the MITEF GREECE startups. Those variables include the sectoral dispersion of startups, their size, their age and the number of founders they have.

The sectoral dispersion of startups

Related literature has proposed that companies operating in industries with high R&D intensity are more innovative (Thornhill, 2006). Another recent study focused on startups by Aminova, M., & Marchi, E. (2021) seemed to find similar results, even though the definition of sectors is different than the one we are implementing. In the case of this paper, while the startups that participated in the MITEF Greece competition over the years can be classified in a broad range of sectors, they all had a deep-tech orientation, bringing new technologies such as AI, Machine learning, Robotics, Software Development and Internet of Things, to the sector they operated in. Therefore, this is important to be considered, when analyzing the startups operating in generally low-tech sectors like HORECA or Agriculture, they too have a strong deep-tech orientation. This element is explicitly mentioned in the rules to enter the MITEF Greece competition in the first place, showcasing an orientation towards innovation.

When dividing our startups per sector, we decided on the following categories, to describe the entire sample of 165 startups. The following table shows the breakdown of each sector and it is presented in the order that exists in the graph below (Figure 7).

Table 2
Breakdown of each sector
● Agrotech; agricultural activities, agricultural technologies, beekeeping or livestock farming. ● Business Services; Human Resources, Business Intelligence, cloud storage or project management systems and other innovative solutions. ● Construction & Real Estate; engineering and construction applications and real-estate platforms. ● Educational Services; school or university related applications. ● Environmental & Energy; ecology, renewable energy technologies. ● Financial Services; payment services, banking and other financial services. ● HORECA; hospitality, tourism as well as in restaurant and Catering services. ● Creative Industries and Gaming; Gaming application, creative and cultural industries such as sports. ● Marketing; Marketing, advertising, graphics and social media. ● Medical & Biotech; medical applications, diagnosis and overall patient care. ● Mobility & Transportation; in-city private transportation, global shipping and tracking shipments. ● Retail; selling products to individual customers. ● Tech Solutions and Robotics; artificial intelligence, robotics, internet of things and security applications.

The overall distribution of startups to the aforementioned sectors yields some interesting results.

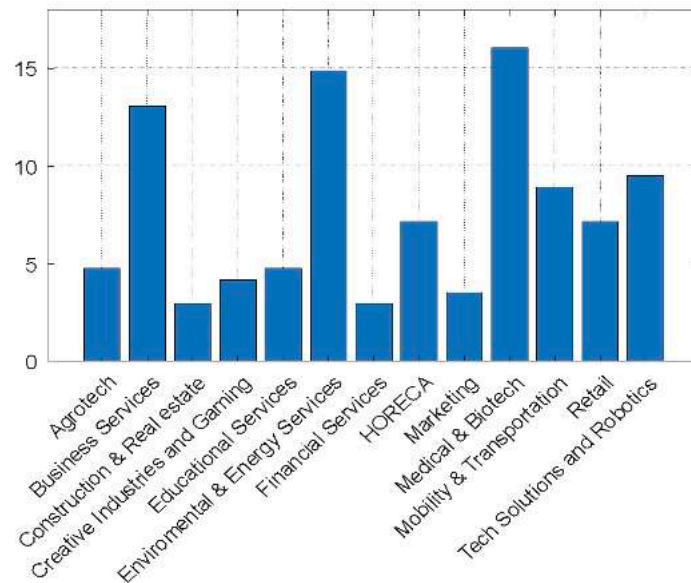


Figure 7: Overall startup sectoral distribution (%) (Observations: 168/169)

It is apparent that the “Medical & Biotech”, “Environmental & Energy” and “Business services” are the top 3 sectors where startups are concentrated in the general sample. This finding highlights the increasing interest in entrepreneurship in those fields. An explanation is that this was the result of an increase in demand for products and services in those sectors, because of the boom in economic activity, the recent Covid-19 health crisis and the on-going attempt of governments and businesses to mitigate the effects of climate change. Additionally, it shows that MITEF Greece startups tend to concentrate more in highly innovative sectors with a huge demand potential.

To summarize our findings, we have included a pie chart with the five most important sectors for our whole sample.

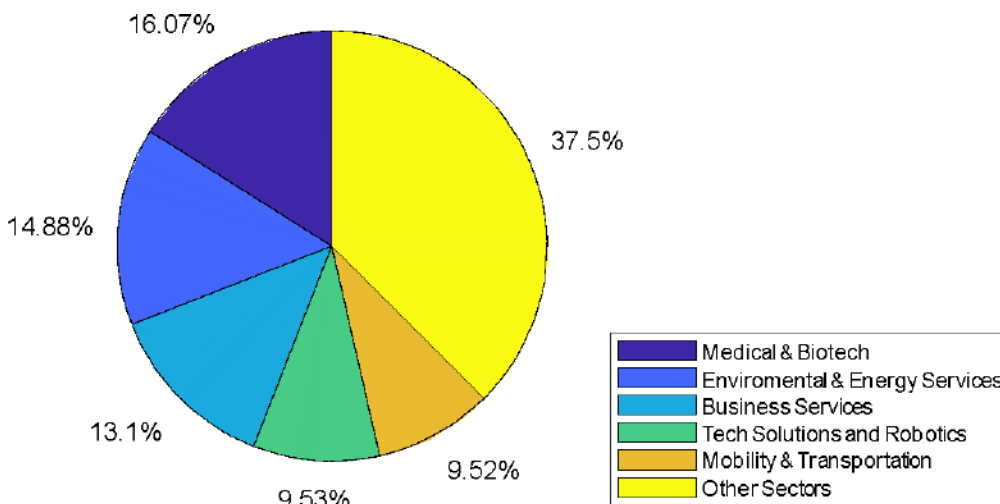


Figure 8: Top 5 sectors shares (Observations: (168/169))

This pie chart clearly shows that a big part of MITEF Greece startups operate in industries with higher investments in R&D and thus are considered more innovative. This finding verifies our assumption that MITEF Greece startups tend to be more innovative due to the industries they operate in.

Age of startups when they joined the MITEF Greece competition.

The phase of development when a startup joins an acceleration program can be crucial for how beneficial this program will be, and

Below we will analyze the startups' age when they joined the competition organized by MITEF Greece, separated into three distinctive groups:

1. The early age startups with ages (-1 to 1). An age of -1 means that the startups with that age were incorporated 1 year after their incubation. This group comprises startups that are very young and thus their business plan might not be evaluated on the market. They might have an innovative product or service, which is now being introduced in the market.
2. The mid age startups with ages (2 to 4). This group includes startups which are in the phase of assessing their business plan on the market and according to the needs of their customers, they might be in the phase of changing the specifications of their product or trying to scale up their production/ expand to new markets etc.
3. The late age startups with ages (5 or more). Statistically most startups are expected to fail in the next 5 years of operation. So, it is confident to suggest that this group of startups includes firms that have passed this threshold and have proved themselves in the market. We can assume that these companies have joined MITEF Greece, to potentially benefit from the new international audience that they will get exposed to.

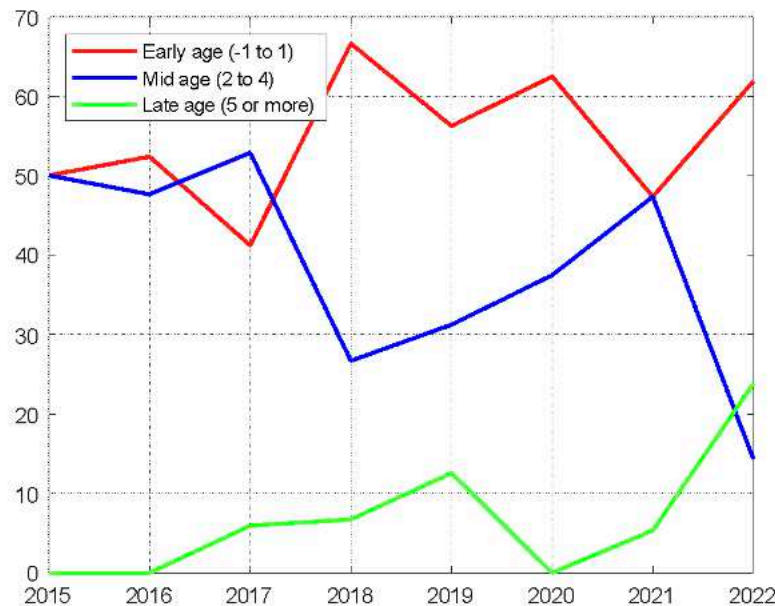


Figure 9: Evolution of MITEF GREECE startups ages (%) (Observations: 140/169)

Looking at the graph of the evolution of the distribution of age groups we notice a couple of things:

1. As time evolves the share of early stage startups increases, which might suggest that new founders/ inventors are more aware of MITEF Greece as it becomes a household name within Greece's startup ecosystem.
2. The share of mid stage startups decreases.
3. The share of late stage startups also increases. This may suggest that even within established startups in the country, the accelerator's services including its international orientation attracts companies wishing to extend their client base or their networks. To sum up, we observe an upward trend in the proportion of both early and late stage startups according to our classification. That intensifies our hypothesis that MITEF Greece's criteria for admission do not skew towards the one or other direction and instead the acceleration program is open to all deep-tech startups. The relationship between a startup's age and choosing an acceleration program deserves further explanation.

Size of startups in terms of the numbers of employees

The literature on the relationship between innovation and large business size can be traced back to Schumpeter (1942) with ambiguous results validating or debunking this relationship. But in particular a recent study by Aminova, M., & Marchi, E. (2021) on startups in Germany, startup size was found to have a positive influence on the startup innovativeness. However, it would be safe to assume that smaller teams in terms of employees are more common at the beginning of their operation, where founders are usually the firm's only employees. Small size startups (1-5 employees) comprise the largest share of our sample. Medium-sized startups (6-20) are the second largest group in our sample by a small margin. Large size startups (>20) were in the minority. As companies undergoing an acceleration program, they are usually in the first stages of their operation, where founders are usually the only employees, therefore smaller teams are usually expected.

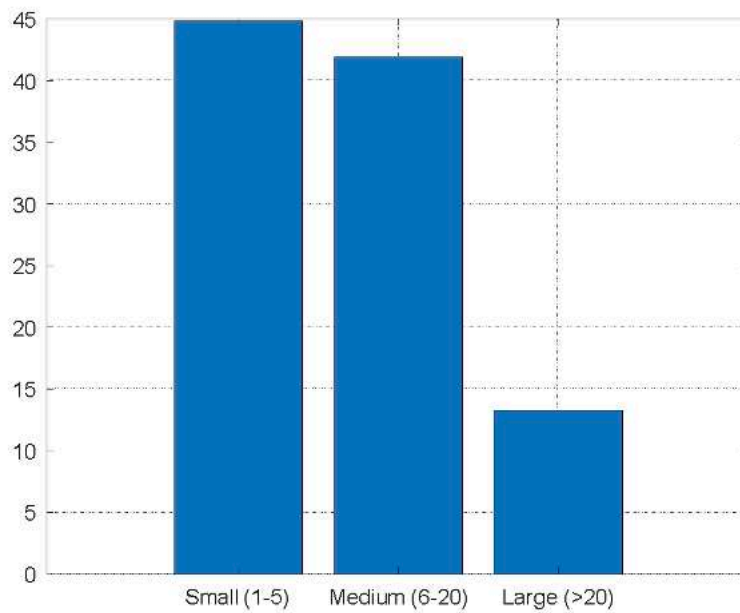


Figure 10: Size of startups (%) (Observations: 114/169)

Startups by number of founders

Additionally, we investigate the number of founders by startup. It is interesting to observe whether multi- person founding teams are more frequent. That might suggest that people with potentially different skills and resources might want to collaborate and create a new business. Thus, we would expect multi-person founders' startups to be more frequent in the MITEF Greece sample, as they would be more innovative. Unlike what our intuition would suggest, we observe that the distribution is highly skewed, with over 75% of startups to be formed by 1 or 2 founders and big founding teams account for a small part of the sample. This actually seems to be backed by reality. Startups with small founder teams are equally common as multi person ones. The level of excess innovation of multi person startups relative to small ones is determined by whether those ones will be able to use the complimentary talents of founders without jeopardizing the stability of the startup.

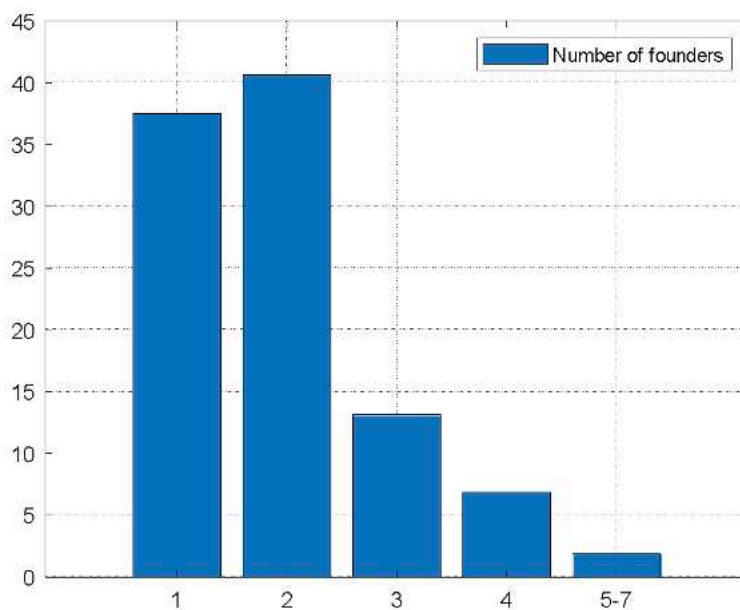


Figure 11: Number of founders (%) (Observations: 160/169)

To sum up, although the small number of founders in our startups seems worrying, there is not enough evidence to bolster a positive relationship between the number of startup founders and innovation.

Startups by funding

Finally, we can look at the distribution of the startups funding. According to recent literature (Errico et al, 2023; Wang D. & Schott T., 2022; Okrah J. & Nepp A.N., 2017) there has been evidence that higher funding is more commonly provided to more innovative startups, however in our case there is not enough publicly available data to prove how different companies attract more or less funding before or after acceleration by MITEF Greece . Out of the 169 observations, we have information on the funding received from 22 startups. Funding is presented in the database of startups accelerated by MITEF Greece, ranges from 15.000 to over 27.000.000 euros with an average size of funding of around 260.000 euros. We can observe that over 90% of the firms, for which data is available, publicly received funding over 100.000 euros, which implies that the funding needs of startups are pretty substantial. This finding seems to be in accordance with our assumption that the funding size can serve as an approximation of the innovation of a startup, given the fact that a bigger funding would be more probable to be given to a startup with more innovative products or services. However, we can also assume that information on funding is only available for companies that received bigger amounts of funding, while those who did not, could not publish data on it.

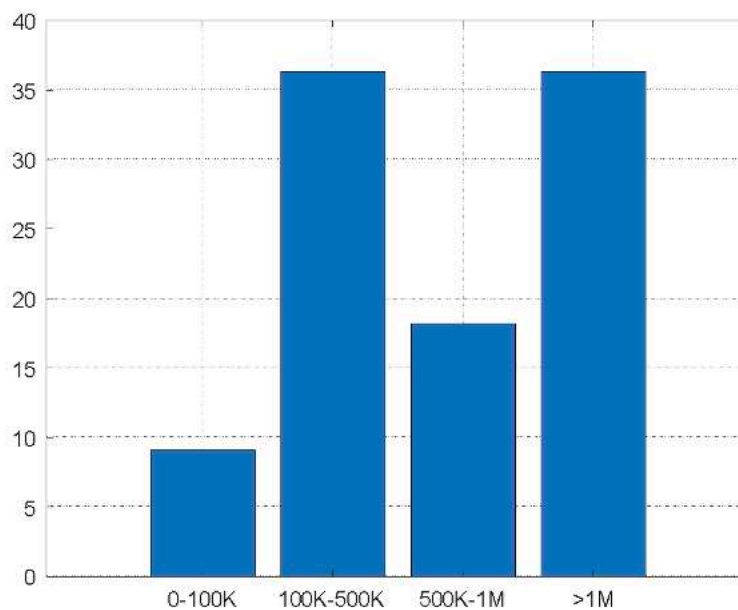


Figure 12: Funding of MITEF GREECE startups (%) (Observations: 22/169)

A comparative analysis between our dataset and other studies can also be of use to our readers. Given it's out of the scope of our research, this analysis has been attached in Appendix 4 to which we have already referred to in Section 3.2.

In summary, this Section suggests that given our observations from the MITEF Greece dataset, a significant portion of startups possess characteristics that, according to the literature (Baron, T., & Harima, A., 2019; Thornhill, 2006; Aminova, M., & Marchi, E., 2021; Errico et al, 2023; Wang D. & Schott T., 2022; Okrah J. & Nepp A.N., 2017) can be found in startups with international orientation and innovative processes. Those characteristics include, but are not limited to, location, the existence of diaspora people or foreigners in the founding team, the sectors they operate in and their amount of funding.

Concluding remarks

Taking into account the information presented in Section 3 regarding both startups and founders, and also keeping in mind our methodological challenges, we can use this data to reach conclusions on the operation and mission of the accelerator. Specifically, both the origin of its founders and the headquarters of the startups, present high internationalization, especially compared to other studies on the startup ecosystem as presented in Appendix 4. In addition, the deep tech sectors in which the startups operate, as well as the age and educational level of the founders point to the high degree of innovation of the MITEF Greece accelerated startups. After examining the demography of the startups, it is important to consider the culture, values, selection process and the history of MITEF Greece to further understand its mission and how it turns its vision into practice.

4. MITEF Greece - A Chapter of Global MITEF Transplanted locally

The second research pillar of our analysis of MITEF Greece concerns its origins, mission, and organization, the organizational structure as well as its -embeddedness in the global MIT academic-entrepreneurial ecosystem, the mindset of its people, the selection process in their annual competitions, and how these impacted the outcomes of its accelerated founders and startups in particular in relation to the innovation- internationalization nexus. For this Section of the paper, we have relied on the following sources: published material by MITEF Global (now The Entrepreneur Forum), MITEF Greece, and the Hellenic Innovation Network and third party sources. We also held interviews with stakeholders of MITEF Greece, the Hellenic Innovation Network and accelerated startups.

4.1 The global MIT entrepreneurial ecosystem and its connections to the Greek Diaspora

In order to grasp the full potential of MITEF Greece as an organization, it is necessary to underline that the cosmos in which it was embedded was exceptional: Notably, MIT has a long historical legacy of supporting “useful work”- developing and linking scientific and technological talent to “entrepreneurism”. In the evolution of the MIT entrepreneurial ecosystem, “the sudden need for research in the early 1940s” was a pivotal moment (Roberts & Eesley, 2009). In addition, as Box 6 below reveals, the MIT global entrepreneurial ecosystem is the largest in the world for an academic institution. [11](#)

Box 6

It is estimated that there are over 30,000 active companies founded by MIT alumni that:

1. employ 4.6 million individuals
2. and generate annual global revenues of \$1.9 trillion

This is roughly equivalent to the GDP of the world's 10th largest economy as of 2014. (Roberts et al., 2015 and Dikaiakos, 2016).

The MIT entrepreneurial ecosystem has one more unique feature which enhanced the capabilities of MITEF Greece as an accelerator. Within its global network based ecosystem, a thesaurus of physical and knowledge resources, there exists a large pool of student, staff and alumni Greek talent, mainly Diaspora but also of alumni living in Greece (brain gainers). This is a fact which not only exists today, but also was present in the past. Here an anecdotal piece of information fits well: In a Table with 24 examples of most important MIT alumni founded companies and their founders, there is one Diaspora Greek: George Hatsopoulos, Thermo Electron, established in 1956 (Roberts & Eesley, 2009).

In a nutshell, in the story that unfolds below the origins and evolution of MITEF Greece, the Greek "MITers" have been seminal not only instigators of the creation of this project, but also in its day to day operation. MITEF Greece has from the start has not solely been the case of a successful American organization transplanted as is in a foreign country: it has been something more complex, as its main goal has been that of “facilitating” extensive connections with the Diaspora (Vasilis Papakonstantinou, interview with the authors 17 July 2024 and July 29, 2025.)

4.2 Mission of MITEF Greece briefly stated

The mission of this organization was to facilitate deep-high tech Greek startups: to engage in technology transfer, effective commercialization of inventions and hence their transformation into innovations, their access into the international market and in particular in the USA market place. This package of scaling up is more or less typical of accelerators. However, this case is more complex: as we will show below the mission of MITEF Greece also worked towards enhancing connections between the Diaspora and the Greek startup community.

4.3 Origins and evolution of MITEF Greece as an organization

The MIT Enterprise Forum was a global foundation connected with the MIT through MIT Technology Review founded in 1978 (The Entrepreneur Forum website, 2023). Its mission was to support deep-tech startups flourish, by providing access to mentorship and resources from experienced professionals. After the initial chapters in the U.S., international chapters emerged, with each chapter operating in a specific location and supporting the development of startups in high technology sectors. The global network of MITEF, has been active in multiple regions in Europe, but also around the world in many

startup ecosystems (MIT Enterprise Forum- Worldwide Chapters, accessed in 2023 but no longer available). These include Spain, Poland, Israel, Saudi Arabia, the Gulf Cooperation Council in Dubai, Lebanon, Pakistan and Thailand. When MITEF shut down in 2022, the Cambridge Chapter was renamed as The Entrepreneur Forum, and continues to operate to this day. It should be underlined here that the Greek Chapter has the unique feature that it was the first to be established in a startup ecosystem that was underdeveloped as it was still in its early days. (V. Papakonstantinou, interview with the authors 17 July 2024)

To answer the question on how the Greek chapter was created, we turn our attention to a small group of Greek MIT alumni (a mixture of Diaspora and local), who, following a deep tech investment in Greece, decided that they wanted to help the deep tech startup ecosystem in the country develop. They began by creating the Greek Technology Enterprise Forum, as a Greek founded association with over 50 members with the goal of supporting technology startups in Greece. MITEF Greece, the Greek Chapter of MITEF, was founded in 2013 in Athens, as a non-profit organization named "Greek Technology Entrepreneurship Forum"(GTEF) its purpose being to "mentor, train, assist and support technology-based innovators, entrepreneurs and businesses in Greece and the United States" (StartSmartSEE website, accessed 1 July 2025).

Vice Chairman of MITEF Greece, V. Papakonstantinou was also president of the Greek Alumni Association of MIT at the time, and together with members of the Greek alumni association played a great role in the acquisition of the license and in all the efforts behind this initiative, by being active in various sectors of business and technology as well as within the MIT alumni community (V. Papakonstantinou, interview with the authors 17 July 2024 and July 29, 2025).

They fulfilled reporting obligations towards the main chapter, including detailed presentations of their activities each year, allowing them to use the name of MIT. The connection with MIT has facilitated its orientation towards only high and deep-tech startups operating in various sectors but presenting the common element of technology as a key characteristic promising their success. Another element enhanced by the MIT connection is the existence of a large pool of knowledge regarding the process of commercialization (i.e. the required process by which inventions are transformed into innovations)¹², in which Greece has a weak record and not because of a lack of valuable research results (Caloghirou, 2021). Thus, from the first days of its existence MITEF Greece had an important advantage in enabling commercialization. An interesting early initiative (2015) indicative of the variety of its strong communication channels with the Greek Diaspora (especially in the USA) was the move to create the Hellenic Innovation Network.

Box 7: The Hellenic Innovation Network

An MITEF Greece offspring/affiliate community/network was set up in 2018; the Hellenic Innovation Network, as a result of efforts starting already unofficially in 2015 (V. Papakonstantinou, interview with the authors, July 29, 2025), Apart from Marina Hatsopoulos, (who is currently the President), among the founders were V. Papakonstantinou, Michalis Mpletsas and others with the support of the General Consulate of Greece in Boston. It is a network that operates as an online and physical community aiming to empower Greek and Cypriot startups and offer networking and employment opportunities in the US¹³. It also allows newly founded startups to potentially acquire mentors, advisors or even investors and partners in the United States. This further reinforces our hypothesis that MITEF enables a connection of accelerated startups to the Greek Diaspora and more importantly to MIT alumni. (Hellenic Innovation Network website, November 17, 2022)

The closing chapter in the evolution of MIT Enterprise Forum Greece was in 2023, at which point it transformed into StartSmart South Eastern Europe, building on the legacy of intensive internationalization and innovation which characterized MITEF Greece but aiming to assist the Greek startup ecosystem to attain the status of a world class technology hub in southeastern Europe- a geographic area in which historically there has been a strong presence of Diaspora Greek communities (StartSmartSEE website, accessed 1 July 2025) StartSmartSEE has taken on a more international role expanding its presence in Southeastern Europe and beyond. It provides services to an increasing number of startupperes based in other countries. This is a novelty --a step forward towards the upgrading of Greece, as a startup hub within the international startup ecosystem. An interesting detail: at the moment around 50 % of the accelerated startups are based outside Greece. (The bulk are from SEE countries, (in which there has been a long heritage of Greek Diaspora communities) as for example: Albania, Croatia, Bulgaria, Slovenia, but a few are from outside Southeastern Europe: the UK, Italy, Cyprus and Gaza.



Figure 13: the MITEF global ecosystem, and the new StartSmart system¹⁴.

4.4 A transplanted organization connecting with the Diaspora

As explained, MITEF Greece was a transplanted accelerator belonging to the wider ecosystem of MITEF Global. As expected from such a type of organization, it focused on enhancing technology transfer (largely from the USA), the commercialization of inventions, aka innovation. However, in addition to benefiting from the vast knowledge and network resources of the Global MIT entrepreneurial ecosystem, including the startup acceleration playbook created by the MITEF Global Team in Cambridge, it also had access to the Diaspora diverse knowledge resources, common cultural values (namely trust based business collaborations built on the principle of reciprocity) and mission of building valuable bridges for the internationalization of Greeks startups.

Put simply, the MITEF ecosystem was complex, and it is impressive that the collaboration with the Diaspora on issues of strategy ran smoothly as all actions were mutually beneficial for all parties involved already from the inception phase. At a period of de-globalization and economic turbulence: the long economic crisis and then covid, this combination was indeed a power bomb!

4.5 The main activities of MITEF Greece and cultural values- the human factor

In its early days (2013-2014), MITEF Greece focused on describing the conditions of the Greek startup ecosystem, as its members volunteered to help bridge the gap between startups in Greece and Cyprus and the U.S. market. This was manifested through tapping into Diaspora Greek networks which were part of the MIT academic and entrepreneurial ecosystem, and worked to create "space" for them to provide mentorship and built with them mutually beneficial interactions. The Greek Chapter of global MITEF was the first one created in a startup ecosystem that was not already mature enough. The main issues the organization faced in its operation in Greece, were the lack of funding, since it operated as a non-profit organization as well as bureaucratic and legal issues that occurred especially in the beginning.

From 2015 onwards, at the center of the activities of MITEF Greece was the organization of yearly acceleration programs offering hands-on knowledge, mentorship, visibility and global networking opportunities to entrepreneurs, specifically those who are active in deep tech projects. Around 250 startups in total participated in the competition which were held annually from 2015 to 2022. According to V. Papakonstantinou there was a strict selection process of startups in the competition which allowed MITEF Greece to stand out in the startup ecosystem. Focusing on specific sectors, mainly on high tech inventions, chosen with fair criteria by a group of experts, so the choice could be as unbiased as possible. "Of course, we cannot say that the only reason for the success of our accelerated startups was only due to our program." (V. Papakonstantinou, interview with the authors 17 July 2024)

Once the selection process was completed the most notable feature of this accelerator is that the services offered consisted of a structured program aiming at transforming their startups into global companies. This program provides specialized workshops and mentorship, networking and the unique opportunity of its "trainees" to leverage its affiliation with MIT, enabling them to tap into an immense pool of soft and hard knowledge, to communicate with top scientists and businessmen globally.

Excerpts from interviews of accelerated startupper, conducted in our field research, are indicative:

In the words of high tech startup founder George Boretos "MITEF ... awarded us and we got the chance to go to the USA and through this visit we made a lot of connections. They opened for us some doors at least for the beginning. We got a lot of important information through seminars. From that time until now I think that it's one of the best accelerators in the Greek startup community and it's still developing" (G. Boretos, interview with the authors, March 21, 2023).

According to a fintech startup founder, Antonis Prentzas, whose company entered MITEF Greece in the early stages of its operation, "they [MITEF Greece] had a lot of interesting workshops and connected us with different people. Also, we found one of our first investors through MITEF. It had a very positive impact for us" (A. Prentzas, interview with the authors, May 5, 2023). These experiences highlight the role of the accelerator in supporting the operation and growth of companies through leveraging a vast global entrepreneurship ecosystem (in particular the USA) within which there is a long heritage of excellence and high community values (George Eleftheriou, interview by the authors May 6, 2025)

After its transformation into StartSmart SEE, the organization now hosts a yearly Conference and other Events, Hands-on Workshops as well as the Tech Insiders Club that allows business executives to familiarize with the startup ecosystem. To that extent, the organization has partnered up with MIT Open Learning and the MIT JWEL network to host educational events and workshops.

Central to this whole process, from the selection of the startupper to the completion of the program, were the repatriated alumni and Diaspora Greeks who gave opportunities to Greek startupper regardless of whether they were MIT graduates or not. Overall, the impression we gained is that the Diaspora was in some ways equally or more important than MITEF Global headquarters in the operation of MITEF Greece.

The mapping of the creation, operation, evolution of this accelerator brought to the surface the invisible/intangible cultural factors behind the success of the accelerated startup(per)s of a global community as portrayed in Section 3 of this working paper which mapped the outcomes of the accelerator. Apart from the obvious hard knowledge resources leveraged from the global MIT-MITEF and Diaspora ecosystems were the invisible factors-the soft skills and belief system : the generosity of all the stakeholders offering services to MITEF Greece and its accelerees: relations of trust creating a strong sense of community; a sense of dedication, "togetherness" (μαζί); open mindedness in ideas and collaborations. Here we would like to underline that this spirit of togetherness was highly present in the words of those leading stakeholders interviewed by us. When we first came across this "spiritual mode" from the very first interview (which was with Marina Hatsopoulos, on 27 October 2022) it was like a door was opening for a new world of progress through community ties and reciprocity, one familiar to the traditional world of the Greek Diaspora and also as described in a contemporary context and from a global perspective by Nicholas Christakis and James Fowler (2009). Moreover, we have argued that the deeply embedded feature of nostos of the Diaspora was one more critical factor in the success of MITEF Greece and its eventual evolution into StartSmart SEE.

Our concluding hypothesis from the analysis of our data is, that of highest importance in attaining the above distinctions were a combination of a variety of factors: high selection standards by MITEF Greece for those accepted for acceleration, its access to substantial knowledge and network resources as a result of its institutional embeddedness in the global entrepreneurial ecosystem of MIT. The latter which includes companies of all sizes (from startups to large corporate entities) has been based on a cultural norm that combines the following attributes: "love of innovation/innovation seeking", openness /open mindset, relations of trust and collaborations built on loyalty and reciprocity within the MIT community. Notably, within this ecosystem-community there are numerous Diaspora, brain gain and local Greeks who are MIT affiliates or graduates.

In a nutshell, this accelerator is an example of successful transplantation of avant-garde technical knowledge, through access to a worldwide "tested" acceleration framework and through enhancement of the geoeconomic presence of Greek startupper. The accelerator interconnects two cultural heritages, that of MIT and the Greek Diaspora, towards a common goal.

5 Conclusion: Policy relevant thoughts, Summary of findings, Direct impact

5.1 Policy relevant thoughts¹⁵

Traditional strategies for enhancing the development of Greek startups companies usually include the following: providing financing opportunities; streamlining regulations; creating strong IP laws; establishing effective commercialization systems within domestic universities and research institutions, which can foster entrepreneurial thinking and reduce the risks faced by researchers seeking to launch spinoffs; export assistance programs; special tax regimes or grants; improving basic infrastructures so as to increase the inward flow of brain gainers and limit the outflow of brain drainers. etc . We will not reiterate them as the aforementioned policy actions and proposals are well known.

Instead, we wish to focus on policies that emerge from the findings of this specific real-life case-study on acceleration. To paraphrase the opening sentence of the abstract of this working paper: institutions matter.

This case study through the construction of a data base, the use of descriptive statistics and qualitative analysis demonstrated a real life example of how a support organization offering acceleration mattered for startup(per)s. If other scholars are triggered to undertake in the future a similar task on other accelerators/support organizations, we believe that there will be various benefits for all stakeholders in the ecosystem, including policy makers.

Furthermore, there is an urgent need for more detailed knowledge about startups at a holistic national level through the implementation of an objective system that would track and evaluate with objective criteria over time of: the impediments in the transition from invention to commercialization; the types of innovation embodied in their products/services; the performance of startups; their internationalization- geo-economic outreach; the degree of scaling up; and their survival rate.

Our findings indeed support the thesis that Greece can unlock the full innovation potential of its research and startup ecosystem if more initiatives are taken in the direction of **cultivating the heritage of "μαζί" and trust**, as displayed within MITEF Greece, the MIT global entrepreneurial ecosystem. and the joint mobilization of diaspora-driven connectivity. Surely, there exist other elite global academia-research institutions with valuable connections with the Diaspora which might in the future wish for an involvement in the Greek startup ecosystem.

In specific building more bridges with the Diaspora, linking local and international actors is necessary.

This has two sides. On the one hand, the undertaking of more initiatives by local stakeholders, including brain gainers, towards building stronger networks with the Greek Diaspora (traditional and brain drainers) represents a valuable strategic asset for enhancing the outcomes of local startup support organizations and the performance of startups. Diaspora members can act as trusted advisors, helping startups expand internationally by offering market insights, mentorship, and access to local talent; resources often out of reach for small and relatively unknown ventures. This case study is a specific example of how MIT graduates/ brain gainers successfully acted as mediators with the Diaspora for facilitating: the process of technology-knowledge transfer, commercialization, the scale of the international reach of the local Greek startup ecosystem via the implantation locally of a chapter of an international University accelerator. Had the Diaspora not been involved it is questionable whether this accelerator would have been so successful, in spite of the powerhouse of resources offered by MIT.

On the other hand, there is the need for the Diaspora to develop with its own initiative. Moreover, it is also well known, but has not been researched in detail, that members of the Diaspora have taken the initiative -out of love for the homeland, to offer ad hoc unrecorded such services to early stage startup ventures in the homeland. However, it is a fact that more extensive and geographically dispersed Diaspora involvement in the Greek startup ecosystem is hindered by a deep seated institutional rivalry and fragmentation within the Greek Diaspora social community institutions, both at an international level and within the multiple nations in which it is located. (S. Bakalis interview by the authors August 20, 2025) Hopefully, this blockage will become less pronounced in the future and the cultural value of "μαζί" notable in traditional business networks will prevail.

The creation of incentives for a greater "integration" among support organizations within the startup ecosystem (i.e. accelerators, incubators, innovation parks). The phrase greater "integration", meaning actions driven by the culture of "μαζί" (togetherness), covers a whole cycle; from creating smoother channels of transfer of knowledge among different support organizations to perhaps fostering mergers among them. In essence, integration means building stronger networks of trust among the actors of the startup ecosystem; starting with companies themselves. Working towards a more integrated and

collaborative startup ecosystem, can help provide support to newly founded companies throughout all the stages of development; from invention to commercialization and internationalization. It is only through the fostering of a more integrated regional, national and European startup ecosystem, that Greece and the European Union as a whole can respond to the challenges presented, and nurture innovation at its core. Having said this, the raw data provided here, provide a starting point, triggering future comparisons at a microlevel of accelerator outcome.

Last but not least, greater cooperation between corporations and the startup ecosystem, may help newly founded startup enterprises grow and upscale (A. Doxiadis, interview with the authors, October 11, 2025). It may also help already established companies embed innovation across their value chains, and can create long-term benefits for both all the private actors involved as well as the national economy, even if results are not immediate.

To conclude, this working paper demonstrates how the urgency of assisting the development of the further development of the Greek startup ecosystem, is undoubtedly -an urgent national priority-y, requires a multilevel radical reset. Namely, a move away from disarticulation towards an open mindset and the move towards an all inclusive culture among institutional stakeholders (including startups, support organizations, policymakers) and even between startups and established companies. By all inclusive culture meaning a culture of trust; sharing innovation, information and data in general; building multifaceted interconnections and collaborations. However, apart from functioning as an example for an all inclusive culture, MITEF was also directly impactful in a number of ways.

5.2 Summary of findings

To recapitulate: the motivation of this case study has been to understand how a support organization impacted at a micro level the contribution of startups to the transition of Greece toward an internationally competitive, innovation-driven production model.

Although the case of MITEF Greece cannot be exactly replicated, we believe that it offers useful insights for the Greek startup ecosystem as to how to reach as a whole a far larger geoeconomic reach at a time at a time of rising deglobalization - global economic fragmentation. We have based our analysis on the precept that structure of organizations-and even the structures of networks matter and are intimately interconnected with culture and this is one of the ultimate lessons derived from this case study.

Among the plenty missing segments in the study of the mosaic of the Greek startup ecosystem is that of research on individual support organizations. Based on the premise that support organizations impact startups, this working paper has analysed the features and outcomes of startup(per)s accelerated by MITEF Greece and the latter's mission/organization/strategy. MITEF Greece (2015-2022), which has since 2023 upgraded to StartSmart Southeastern Europe, was the sole accelerator in Greece linked to an international academic institution; and indeed an institution with arguably the largest global entrepreneurship startup ecosystem. The Diaspora's presence held a prominent position in our narrative and contributed in alliance with the MITEF Global principles, enabling the impressive geoeconomic spread of participant startup(per)s outside Greece.

Our main findings are that participating startup(pers) stood out in the startup ecosystem in the following ways: Founders were a mosaic of local and Diaspora Greeks as well as non-Greeks; startups had a global reach, with a presence in 20 countries and an impressive share in deep-tech processes and sectors. These features substantially enhanced the geoeconomic reach of the Greek startup community. Indicatively, it supported deeptech in plenty of sectors, among the top ones: medicine/life sciences, environment/energy, and technical solutions-robotics. These sectors stood out from the beginning although this sectoral composition was not usual among startups in the Greek ecosystem especially before 2019. In a nutshell, MITEF accelerated startupper)s stood at the cutting edge of the nexus of innovation and internationalization in the Greek startup ecosystem.

How was this possible? We put forward the hypothesis that this outcome was attained as a result of the following factors: the dedication; high expertise; open mindset; heritage of a culture of trust, reciprocity and strong sense of community ("μυζή") of the Greek MIT graduates (local, brain drain and Diaspora) who were running MITEF Greece; the careful selection process of startups; the ample business and technological know-how resources available to MITEF Greece by the vast global MIT entrepreneurship community and its enthusiastic pool of Diaspora Greeks in the USA who were involved in the accelerator and its offspring The Hellenic Innovation Network.

5.3. Direct impact

MITEF Greece provided a successful model for the specific process of technology transfer of startup acceleration, from the global birthplace of the startup phenomenon (USA) to a less developed capitalist economy: Greece. This technology transfer (see Section 4) started quite soon after the spread of the startup phenomenon in Greece and its acceleration success has been phenomenal as it coincided with a time of poly-crises in this country. A distinctive feature of this acceleration model (see Section 4) was that it allowed for flexibility. The USA headquarters provided to its Greek chapter a playbook with broad stroke guidelines, allowing thus for plenty of leeway for adjustment to the local conditions. This feature abides to what is considered a *sine qua non* in the international technology transfer literature for securing a successful outcome when the levels of development and socio-economic environment of the mother and receiving country diverge significantly (Pepelasis, 2021).

MITEF Greece is also set apart because the resources offered to startupperes were greater, more international and more diverse than those offered by other support organizations in Greece. The body of startups accelerated by MITEF Greece also represented a large segment of the startup community at that time.

The transformation of MITEF Greece into Start Smart Southeastern Europe in 2023 has for the first time upgraded the country to a regional and international hub for deep-tech startups.

MITEF Greece is the only startup support organization in Greece to focus simultaneously on the commercialization of deep-tech startups as well as their internationalization/ international competitiveness, the two areas in which the Greek economy has been a laggard as shown in Section 2. This dual success, in combination with the high leverage of the diaspora, are of seminal importance as shown by the figures in Section 3, as they placed MITEF Greece accelerated startup(per)s in a distinctive position, ahead of others in the local startup ecosystem.

As we draw to a close this working paper, we would like to underline that as an institution MITEF Greece did not simply matter; it was much more: a pioneer and a disrupter. Indeed, the answer is a clear yes, if we pose the counterfactual question of whether in its absence the Greek startup ecosystem would have been less rich in research commercialization, internationalization and diaspora engagement. It would also most likely not have transformed into a regional and international hub, after the creation of Start Smart Southeastern Europe.

APPENDIX 1

Existing publications on the startup ecosystem consist of the following: Published reports of a variety of organizations in the startup ecosystem (as for example VCs and consulting firms focusing on finance- funding opportunities, investments and policy proposals (notably, annual reports on the Greek startup ecosystem of Found.ation [2017-2024] and of BCG [2017-2024]). In addition, are the annual reports and the website of the national registry of startups Elevate Greece founded in 2023; the mapping at AUEB of incubated startups in Athens during the depth of the long economic crisis, 2010-2016, (Besis, Pepelasis, Paraskevas, 2023); the succinct analysis of selected Greek incubators (Ratinho and Mitsopoulos, 2021); a study comparing the MIT startup ecosystem with that of Greece (Spyropoulos, 2019).and research output on innovation in Greece (notably, Caloghirou, et al 2021).

We have also taken into account publications in the international literature in the following areas of expertise, for each of which we mention below indicative publications: the history of innovation (Caron, 2005); the significance of startups for the innovation-internationalization nexus and economic growth (Ressin, 2022); the functions of accelerators (Cohen, 2013 and Hathaway, 2016); the operation and general significance of social networks for progress and goodness (); startup entrepreneurship, internationalization and innovation (Kushida, 2022); the role of academia in startup ecosystems Diaspora resources and networks (Atanasova, 2024), Diaspora presence in other startup ecosystems for example, in Italy and Berlin (Baron & Harima, 2019; . We also consulted various references regarding the factors that affect the innovation and internationalization level of a startup (Baron, T., & Harima, A. 2019; Okrah, J., & Nepp, A.N. 2017)

APPENDIX 2: Questions of the questionnaire distributed to startup founders.

	Questions
1.	Date of Birth
2.	Country of Birth
3.	County(ies) and date of birth of your co-founders
4.	Do you have a parent or other relative who is an entrepreneur- business person?
5.	What is your work experience?
6.	Have you set up another startup before? If yes, when and in which industry?
7.	What inspiration led you to create the startup?
8.	How did you meet the co-founders?
9.	Are any of the co-founders your relative?
10	Have cultural differences with co-founders created difficulties in setting up and running the startup?
11.	In what countries are your customers located?
12	Do you have branches abroad (a country different from the headquarter of the startup)?
13.	What has been the biggest personal obstacle you have had to face in creating and running the startup?
14.	How would you describe the business environment in which you set up your startup?
15	What is your long-term vision for your startup?
16.	Do you have a long term plan to live in the country of your startup?
17.	Based on your personal business experience, what advice would you give someone who wants to start a business?
	All information collected during the research will be kept strictly confidential in accordance with the EU GDPR Law.

APPENDIX 3: Legal form of accelerated startups

For the majority of startups, it was hard to find the relevant information on the legal form of the accelerated MITEF Greece startups in publicly available sources. The plethora of different countries of headquarters often makes it difficult to compare legal forms, since company law often differs, and the form of company has different implications per country and continent. The legal form of a startup is really important, since depending on the type of the business, the capital needs, the amount of shareholders among others, different legal forms might be more suitable for the startup's needs. Across our sample we have only 45 observations about the legal form of the company. Although this is a small number, we can still observe some interesting facts: The distribution across different forms is highly skewed. Out of the 7 distinct structures, which are the Private Company, Limited (LTD), Incorporated (INC), Public Limited Company (PLC) Single Member Private Company, Limited Liability Company (LLC) and Limited Partnership (LP), the top 3 choices (Private Company, LTD and INC) account for a stunning 85% of the total subsample. The other 4 choices account for 5% or less. This shows a unanimous preference by startups for those 3 structures. Finally, the fact that information is not available for the majority of startups is not available in combination with the fact that the largest segment of startups were in the early stage implies that a fair number of startups were still in an ideation stage and may have still been in a pre legal form.

APPENDIX 4: Attempted Comparisons with other studies and datasets on Greek startups and startuppers

In our analysis, we have attempted to compare our sample with the two other largest projects, to pinpoint differences or similarities between them. The other projects with data sets chosen are those of: Dianeosis, specifically a study conducted on a national basis with a data set of information on 267 startups (a mixture of incubated and not incubated) in 2021; Basis and Pepelasis working paper, published by the Athens University of Economics and Business, on 300 incubated startups in Athens during the depth of the Greek crisis (2010-2016). One major limitation of this comparison is that among them the data are vastly different in terms of their chronology, size and indicator used, making the datasets not entirely compatible between them. In any case, due to a general lack of the use of uniform data for studying the ecosystem at this stage we suggest that the data at hand can provide a first basis to showcase MITEF Greece and its particularities with regard to four specific variables: the location of the startup the founders' age and gender and their educational level.

First of all, the MITEF Greece startups with headquarters in Greece represent 65% of the sample, compared to Dianeosis with 79.7% and 88.76% for the AUEB study of companies with headquarters in Greece respectively. This showcases the greater internationalization of the companies that participated in the annual MITEF Greece competition.

As far as the founders' ages are concerned, MITEF Greece's founders are on average older, compared to the study conducted by Dianeosis as well as by Basis and Pepelasis, where most founders are between 25-34 years old (43.8%), and 20 to 29 (40.05%). Most of the founders in MITEF Greece are between 30 to 39 (39.34%). Regarding the educational level of founders it is also higher, especially for founders that have PhDs (27% for MITEF Greece, 17% for Dianeosis and 9.18% for the Basis & Pepelasis study). One possible explanation for this could be MITEF Greece's orientation towards deeptech inventions in their technical stage, which is a field requiring higher education, and such inventions often occur within research centers and universities, or are produced by professionals with high education backgrounds.

When it comes to gender, founders are primarily male in all of the studies selected, but the percentage of male founders is higher for MITEF Greece 85.99%, compared to the study conducted by Dianeosis 80.9%, and to AUEB. Therefore, we observe a lower number of women founders in the MITEF Greece data set, but we cannot provide an adequate explanation for this observation, only possibly that the high-tech fields in which MITEF Greece operates are often male-dominated.

To sum up, despite the methodological differences that hinder a more sound comparison between startups incubated by MITEF Greece, we can note some interesting differences between our sample and other recordings of the Greek startup ecosystem. These observations align with MITEF Greece's orientation towards innovation and internationalization, but prove that room for improvement in resolving issues like gender-parity still persist in some sectors. To sum up, we would like to mention two sources that may provide further insight on the MIT startup ecosystem and or how it compares to the Greek one; specifically Theocharis and Spyropoulos, 2019 and Roberts & Eesley, 2009).

	MITEF Greece dataset constructed for this paper (2016-2022), (169 startups, 312 founders)	Dianeosis study 12.01.2021 (267 startups)	Basis & Pepelasis, 2020 2010-2016 (300 startups)
Location	Greece 65%	Greece 79.7%	Greece 88.76%
Level of Education	BA 16% MA 55% PhD 27% University Professor: -	BA 23% MA 48% PhD 17% University Professor: -	BA 33% MA 42% PhD 9.18 % University Professor: 3.53%
Founders' Age	20-29: 13.99% 30-39: 36.36% 40-49: 34.27% 50+: 14.69%	18-24: 9.7% 25-34: 43.8% 35-44: 35.6% 44-54: 9.7% 55+: 1.1%	<20: 0.70% 20-29: 40.05% 30-39: 39.34% 40-49: 15.46% 50-59: 3.51% 60-69: 0.94%
Founders' Gender	Male: 85.89% Female: 14.10	Male: 80.9% Female: 19.1%	Male: 75.78% Female: 24.42%

Notes

- 1 Disclaimer: we do not argue that MITEF Greece was necessarily the sole accelerator/support organization to attain this "distinction ". For more information on other support organizations of the Greek Startup ecosystem take a look at Section 2.3 and for an in-depth analysis see Pepelasis et al., 2020.
- 2 Data for ranking in the 2000s.
- 3 The global average of 58.01: It was 78.26 for 2022 and 75.6 in 2023 according to Statista (2018).
- 4 Prior to 2013 the only support organizations for startups and innovation were Corallia (2005), Microsoft Innovation Center (2009) and NBG Business Seeds(2010).
- 5 Active Venture Capital Funds in 2022 and beyond. Source: Found.ation. (2022). (rep.). Startups in Greece - Venture Financing Report 2022-2023. Athens, Greece as well as the Venture Capital's websites
- 6 Find out more: <https://thehellenicinitiative.org>
- 7 Find out more: <https://hellenic-academics.org>
- 8 The UK (12.86%) and the USA (9.09%) as places of registration of major significance were followed by Cyprus (4.85%) and Estonia (1.21%). Each of the following countries accounted for less than 1% of the startups abroad: Belgium, France, Ireland, Netherlands, South Africa, Sweden, Switzerland, UAE.
- 9 Belgium, China, Cyprus, Italy, Korea, Malta, Netherlands, Poland, Ukraine, UK, USA, South Africa, Switzerland, Turkey.
- 10 These countries were Belgium, China, Cyprus, Estonia, France, Ireland. Italy, S. Korea, Malta, Netherlands. Poland, Ukraine, UK, USA, UAE, South Africa, Sweden, Switzerland, Turkey.
- 11 If we compare the numbers in this Table with the findings in the (Roberts & Eesley, 2009), we see a rising trend over time.
- 12 The process of transforming a high tech product can be depicted in an abstract form as: Invention x Commercialization = Innovation ("Greek Universities: Which strategy for the 21st century?", 2016).
- 13 According to the Hellenic Innovation Network' website (2025), the network was created aiming to empower newly founded businesses in Greece and Cyprus facilitating their "access to potential investors, distributors, partners, customers, suppliers, mentors, advisors and board members"
- 14 In 1982, the organization introduced the Startup Clinics in New York and Cambridge after New York and Cambridge, more chapters of the MIT Enterprise Forum were established globally. (The Entrepreneur Forum website, 2023)
- 15 We wish to thank Yannis Besis (AUEB,M.Sc) for sharing with us insightful comments while writing Section 5.2.

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