



European Democracy Support Annual Review 2024

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Introduction

This fourth annual review of European democracy support provides information on European activities related to democracy in 2024. It covers policies, strategies, and initiatives of the European Union (EU) as well as those of its member states and of non-EU European countries active in democracy support: Norway, Switzerland, and the United Kingdom (UK). The review presents information on European efforts to defend and strengthen democracy both in Europe and around the world.

The year had an interregnum feel as the EU took time to install a new team of leaders and adjust to the results of the June European Parliament elections while awaiting the U.S. elections in November. Much democracy programming continued largely unaffected, and there were no major shifts in overarching policy direction. In some states, the EU enlargement process advanced modestly and helped shore up democratic processes; in others, it did not suffice to prevent adverse developments for democracy. As in previous years, the EU's use of democracy-related sanctions and conditionality was relatively sparing—if anything, the trend was toward an even more cautious use of such instruments.

At the end of the year, indications were taking shape of likely priorities for future democracy strategies under the new European Commission. The direction of travel seemed to be toward more stress on defending European democracy internally combined with a less clear-cut prioritization of democracy externally. The impact on democracy policies of a second U.S. presidency for Donald Trump was not apparent by the end of the year, although it was clear that the debate centered far more on the trade and security implications for the EU of the change in U.S. administration than on democracy support.

Much was made of 2024 being an elections superyear, with an unprecedented number of votes around the world in a twelve-month period. These elections seemed to revive democracy in some countries, undermine it in others, and have little systemic impact, positive or negative, in most. In Europe, the year of elections had a more powerful effect on the domestic front than in the realm of foreign policy. Elections reinforced EU concerns over the fragility of democracy in Europe, largely because of the radical right and interference from outside actors. The elections spurred some democracy support engagement outside Europe, although the global wave of votes left a mixed imprint and, overall, did not have the game-changing significance that many reports had predicted at the beginning of 2024.

This review outlines the changes to the general context that conditioned European democracy policies before examining developments related to the European Parliament elections and the EU's new institutional term. It then gives an overview of new democracy-related strategies at the EU level and in European countries. A section assesses questions related to EU enlargement and political changes in the EU candidate countries. Next, the review details developments in EU democracy funding, sanctions and political conditionality, and the democracy elements of the union's security interventions. Together, these elements reflect a broad understanding of democracy support that is applied to policies in and outside the EU. With regard to internal policies, the review covers cross-border EU initiatives but does not focus on policies in single member states.

The Overarching Context

The year 2024 was characterized by a plethora of elections—in Europe, the United States, and beyond—as well as a spike in repressive legislation against nongovernmental organizations (NGOs) and a surge in conflict dynamics.

European Elections

In 2024, attention focused on the significant number of elections held in Europe, both in European countries and for the European Parliament. Many saw these as a stress test for European democracy, given concerns of a renewed surge in support for far-right parties that threaten many liberal political rights. The far right made gains during the year in states such as Austria, France, Germany, and Romania. In the European Parliament elections in June, the far right made gains but did not win as many seats as had been widely predicted. Moving in the opposite direction, in the UK, the Labour Party emerged victorious in the July election, putting an end to fourteen years of Conservative Party rule. Separately from the elections, the falls of the German and French governments toward the end of the year reflected deepening problems of governability in Europe.

The U.S. Presidential Election

The EU spent much of the year concerned about the outcome of the U.S. presidential election and how this might affect European security and democracy. Trump's second term is likely to prove more challenging for democracy than his first; even after overtly threatening democratic institutions after being defeated in 2020, he attracted enough support to win a

comfortable victory in 2024. Trump's return has heightened pressure on the EU to increase military spending and take more responsibility for its own security. While not so prominent, there was also a concern about the likely negative impact for transatlantic cooperation on democracy. European radical-right parties' celebration of Trump's victory is likely to compound the challenges facing European democracy.

Global Elections

In addition, a large number of elections took place outside Europe and the United States in what was widely dubbed an election superyear. Press reports tended to frame this clustering of votes as a problematic risk to global democracy. In truth, the impact of elections varied across countries, and no single, uniform trend took shape as the year unfolded. Some illiberal and autocratizing governments lost some support and were pushed onto the back foot more than expected, as in India, Pakistan, and South Africa. In a small number of countries, such as Senegal, democratic opposition forces emerged victorious. In others, like Venezuela, autocratic regimes manipulated elections in predictable ways. Some turnouts were higher than expected; others were lower. Overall, the much-commented-on year of elections was not a game changer in any single direction.

Repressive NGO Laws

Several governments attacked civic space via so-called foreign agents laws. Governments in Georgia, Hong Kong, Kyrgyzstan, Slovakia, and Zimbabwe introduced new restrictive legislation. In Georgia, the law led to a wave of protests, while in other countries, there was less of a societal response. In the EU, the commission took Hungary's defense-of-sovereignty law, which allows the state to investigate foreign-funded organizations, to the European Court of Justice for violating the right to privacy and the freedoms of speech and assembly. France also introduced a new foreign interference law to counter disinformation and cyber attacks; critics argued that this law could threaten NGOs.¹

Conflict and Securitization

Our 2023 annual review foregrounded the challenge of rising conflict. In 2024, conflict dynamics intensified, with indexes indicating another uptick in violence globally. The Middle East was the most worrying and tragic nucleus of violence, as Israel's attacks on Gaza spiraled into wider regional turbulence. Conflict dynamics deepened in the Sahel and Sudan, and fed into further lurches toward authoritarianism. These developments further pushed security concerns to the top of the international agenda, with a deleterious impact on democracy.

Elections and a New EU Institutional Term

In 2024, the EU held elections and changed its leadership team. These events showcased a significant degree of European democratic resilience while also raising new concerns about the region's political future. The incoming leaders moved to set new priorities, with uncertain implications for EU democracy policy.

European Parliament Elections

The June 6–9 European Parliament elections were a significant test for the EU's democratic resilience, particularly given concerns over the rise of far-right movements, disinformation, foreign interference, and cyber attacks across different countries.

While far-right parties made notable gains, especially in Austria, France, and Italy, the far-right surge was not strong enough to lead to a dramatic collapse of pro-EU forces. While Marine Le Pen's National Rally won in France and Italian Prime Minister Giorgia Meloni's Brothers of Italy were also victorious, the coalition between the center-right European People's Party (EPP), the center-left Socialists and Democrats, and the liberal Renew Europe, with support from the Greens, retained control of the parliament.² This resilience prevented any fundamental breakdown of EU democratic norms, although it also militated against far-reaching political renewal.

Still, far-right parties managed to increase their presence in the parliament and reorganized their formations.³ Meloni now holds greater influence at the EU level. While the mainstream coalition held on paper, the EPP moved to coordinate with the European Conservatives and Reformists (ECR) on some policy issues; the fraying of the cordon sanitaire against the radical right was a prominent theme in 2024. Opinions were divided on how far the incorporation of (some parts of) the radical right into mainstream EU politics would erode European democracy in the long run.

At the operational level, the 2024 elections were well organized, with the turnout of around 51 percent representing a slight increase from the previous elections in 2019.⁴ EU institutions stepped up their efforts to combat disinformation and information manipulation, with a broad degree of success.⁵ The commission advanced many legislative initiatives to strengthen democratic resilience and ensure election integrity, although most of these new rules were not fully applicable ahead of the 2024 elections. An EU regulation on political advertising was not wholly ready for the elections, but some measures did help curtail targeted political ads.⁶

New EU Political Priorities

Both the European Council's Strategic Agenda and the commission's new political guidelines for 2024–2029 identified the defense of democracy among their main priorities.⁷ From these key policy documents formulated in 2024, the incoming commission appears focused more on defending European democracy and less on supporting democracy globally.⁸ The chapter of the political guidelines titled “Protecting our democracy, upholding our values” refers to the EU's internal dimension but hardly at all to democracy support beyond the union's borders.⁹ The mission letters given to the new European commissioners reinforced this new tilt, with a refrain of “We will strengthen our democracy, rally around our values and ensure that we are stronger at home. We will work with our partners and better assert our interests around the world.”¹⁰

In September, European Commission President Ursula von der Leyen announced the portfolios of the new commissioners-designate for the next five years. Relevant for democracy support is the new executive vice president for tech sovereignty, security, and democracy, Finland's Henna Virkkunen. The commissioner for democracy, justice, and the rule of law, Ireland's Michael McGrath, will be responsible for most democracy work in the EU and reports to Virkkunen. During his parliamentary hearing, McGrath promised to boost the parliament's voice in so-called article 7 procedures, which allow the EU to suspend certain rights from a member state; develop the first-ever EU strategy to fight corruption; and accelerate the implementation of the European Media Freedom Act. McGrath's political guidelines also promised strong rule-of-law safeguards in the next EU budget and a widening of political conditionality to all EU funds.

On the external side, relevant commissioners will report to the new high representative for foreign affairs and security policy, Kaja Kallas from Estonia; a new commissioner for enlargement, Marta Kos from Slovenia; a new commissioner for the Mediterranean, Dubravka Šuica from Croatia; and a commissioner for international partnerships, Jozef Síkela from the Czech Republic. The work of all these figures will touch on democracy, although none has a remit that explicitly foregrounds democracy support to any significant extent.

The mission letter to Kallas contained no mention of democracy support.¹¹ In her confirmation hearing, however, Kallas promised to increase support for democracy defenders. The mandate handed to Síkela promoted a “business-like mentality” that focused overwhelmingly on promoting the EU's flagship infrastructure investment initiative, the Global Gateway.¹² There was no mention of democracy support, although the letter did emphasize the need to measure the impact of Global Gateway projects on “human rights and political freedoms.”¹³

A significant development was the naming of Lithuania's Andrius Kubilius as the first-ever European commissioner for defense, a move that reflected the overriding priority given to security issues in the new commission. With budgetary constraints hitting the European

External Action Service, the new commission announced plans to restructure diplomatic staff and prioritize their deployment “where the EU’s primary interests lie.”¹⁴

External Threats

Von der Leyen promised to follow through on her campaign proposal for a European democracy shield to combat increasing threats of foreign interference, hybrid attacks, and disinformation, particularly from Russia and China.¹⁵ McGrath reiterated the prioritization of this shield alongside a proposed digital fairness act.¹⁶ Clear external interference in the first round of Romania’s presidential election in November sharpened the centrality of this challenge. However, at year’s end, it remained difficult to predict exactly what form such a shield would entail. It will be a technology- and information-focused initiative, but it is unclear how much it will extend more widely to other aspects of democracy.

It is also unclear how the shield relates to the foreign funding directive under the Defense of Democracy (DoD) package that the commission adopted at the end of 2023. There is no mention in the new commission’s commitments of follow-up to the DoD package and its directive on the transparency of interest representation activities. Our 2023 annual review reported that this controversial proposal had been delayed in the face of stiff opposition from civil society, with civil society organizations (CSOs) fearing the plan could be weaponized by antidemocratic forces.¹⁷ Given tough opposition in the EU Council and the parliament, it is still not clear whether the directive will now come into force. Still, the importance given to the democracy shield will deepen the focus on threats to democracy from outside Europe.

Evolution in Democracy Strategies

EU-level and national democracy strategies in 2024 included only modest policy innovations, although a handful of European countries launched development plans with democracy-related commitments. Meanwhile, there was progress on several items of EU legislation with implications for democracy, such as acts on media freedom, digital services, and artificial intelligence (AI).

EU External Initiatives

In 2024, the EU issued fewer new policy initiatives and made fewer advances in its external democracy support than in previous years, and many policy shifts were inimical to democratic values. The relative lack of activity in democracy policy was all the more apparent alongside the new dynamism of EU defense, security, and economic commitments.

The year 2024 marked the end point of the EU Action Plan on Human Rights and Democracy for 2020–2024.¹⁸ As several member states, led by Hungary, were not favorable to agreeing to a new, improved, or upgraded plan, the EU decided simply to extend the existing plan to 2027. The commission saw this as a positive move that aligned the plan with the EU’s multiannual financial framework for 2020–2027.¹⁹

A leaked commission plan for a future development policy sought to reframe aid as “investment” in the Global South, citing a need to engage “our strategic partners with a policy mix driven by economic interest, and less so by more traditional and narrow development and foreign policy approaches.”²⁰ This stance cast significant doubt on the commission’s commitment to alleviate poverty as part of its development policy and called into question its promise to prioritize support for universal values in developing countries.

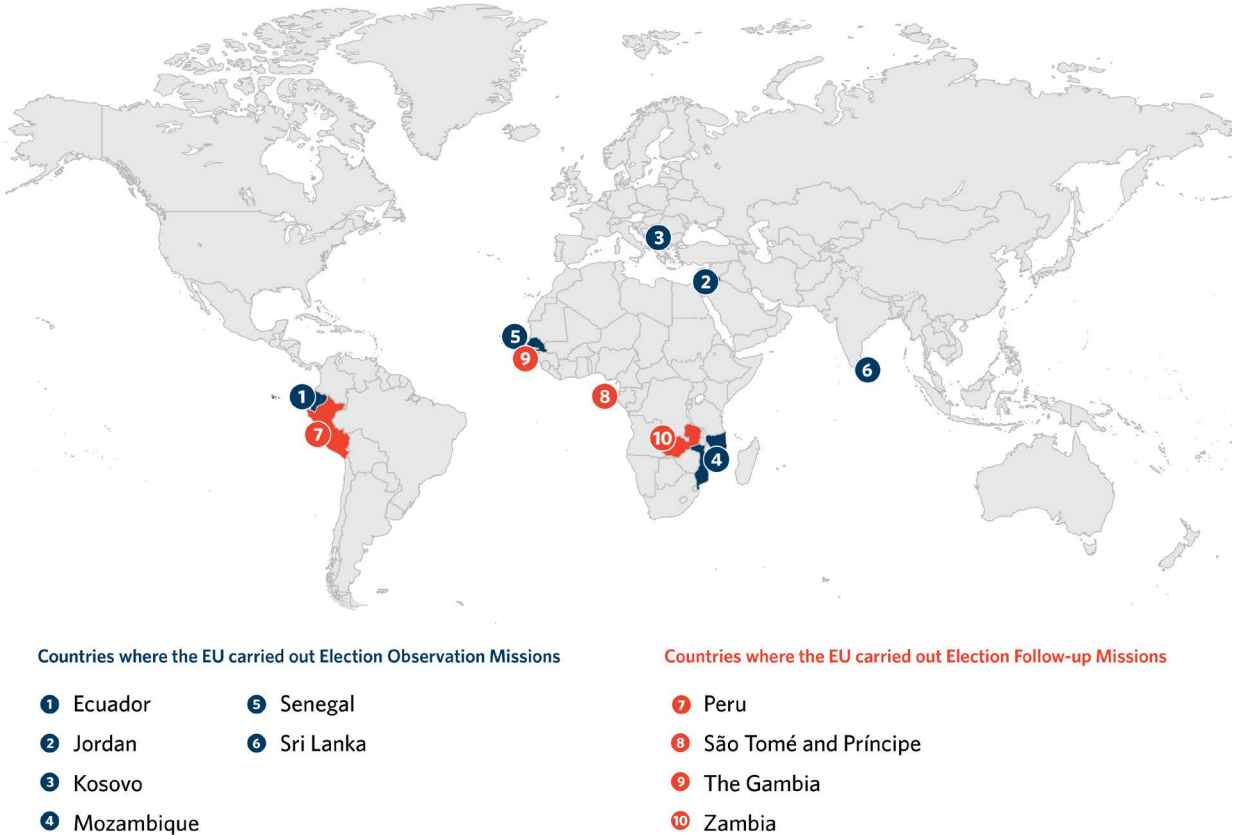
European governments’ increasing prioritization of migration control cut across EU democracy support. Most member states pushed for decisive action to curb migration flows, including through funding so-called return hubs in third countries, mostly nondemocracies. The EU adopted a new pact on migration and asylum, committed to “continue its close cooperation with third countries to tackle the root causes of irregular migration,” and relied heavily on deals with authoritarian regimes (detailed below).²¹

In 2024, there was little advance in democracy support through the EU’s various regional strategies. The 2023 Samoa Agreement between the EU and African, Caribbean, and Pacific states provisionally entered into force, with formal commitments on human rights and democracy, but still exhibited little in the way of tangible content. Before the U.S. presidential election, the EU and the United States agreed on ten practical actions to protect human rights defenders online but declined to launch consultations on democracy policy similar to those in other policy areas.²² Trump’s election self-evidently raises concerns over the future of transatlantic relations on democracy support.

The EU Council adopted an association agreement between the EU and Central America, which included democracy and human rights as one of its three parts.²³ The first strategic dialogue took place under the EU-Japan Strategic Partnership Agreement, which was fully ratified in 2024, and the EU and South Korea announced a security and defense partnership (before the South Korean president’s ill-fated attempt in December to declare martial law).²⁴ While these new agreements are mainly about security, EU leaders frame them as being about “cooperation among democracies” and the protection of democracy—although democracy support is not part of the accords’ remit.²⁵

In the election superyear, the EU deployed only six election observation missions (EOMs), to Ecuador, Jordan, Kosovo, Mozambique, Senegal, and Sri Lanka (see map 1). Additional, follow-up missions were sent to Peru, São Tomé and Príncipe, The Gambia, and Zambia, while election expert missions (EEMs) assessed electoral processes in Bangladesh, Panama, South Africa, and Sri Lanka.²⁶ In Pakistan, an EU EEM report called for thorough investigations into alleged irregularities.²⁷

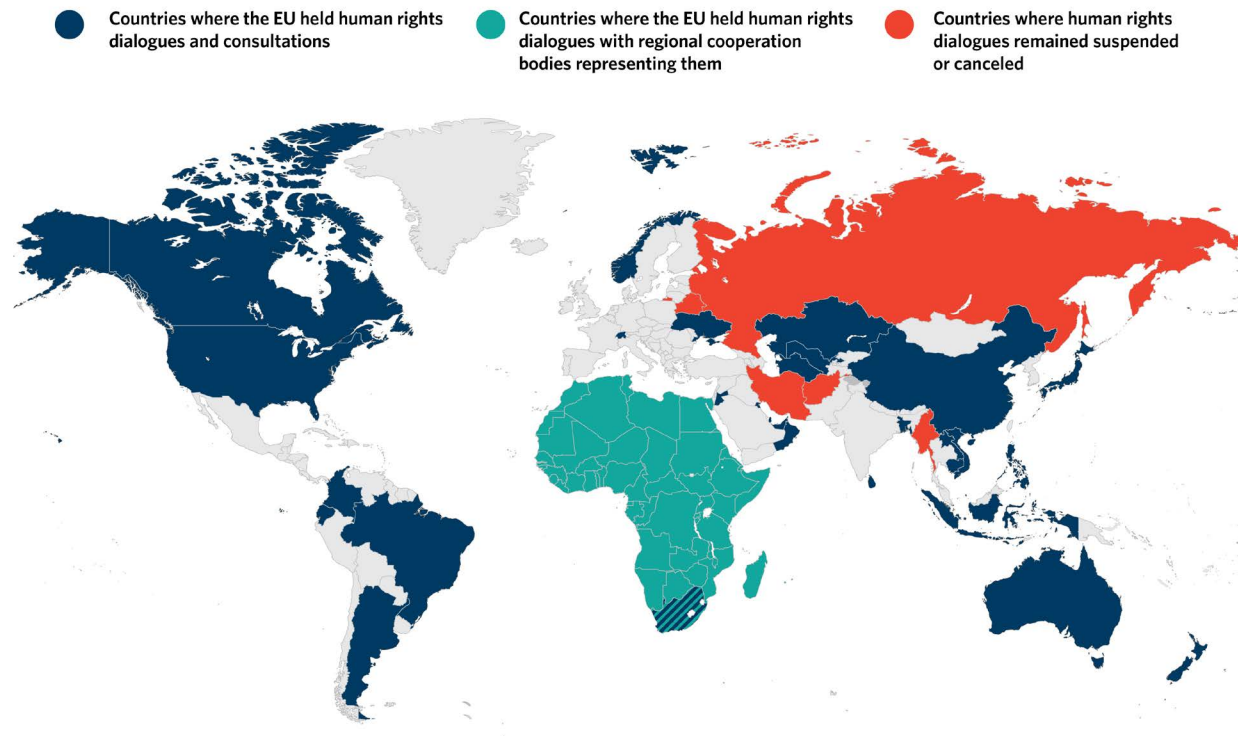
Figure 1. Overview of Election Observation Missions and Election Follow-up Missions, 2024



Source: Data available from the EU Database on Election Missions, the Election Observation and Democracy Support III Report Missions Database, and information provided via the European External Action Service Newsroom.

Note: This map is illustrative; boundaries, names, and designations used do not represent or imply any opinion on the part of Carnegie or the authors. Dotted lines represent approximate disputed boundaries. The final status has not yet been agreed upon.

Figure 2. EU Human Rights Dialogues and Consultations, 2024



Source: An overview table shared by the European External Action Service (EEAS) with the Human Rights and Democracy Network on July 24, 2024, and information provided via the EEAS Newsroom.

Note: This map is illustrative; boundaries, names, and designations used do not represent or imply any opinion on the part of Carnegie or the authors. Dotted lines represent approximate disputed boundaries and the gray areas represent contested territory between China, India, and Pakistan. The final status has not yet been agreed upon.

The EU engaged in human rights dialogues, political dialogues, and consultations with a wide range of global partners (see map 2). In 2024, there were thirty-five such dialogues, which included discussions with regional bodies, such as the African Union (AU), and with countries in Europe, the Middle East, Asia, and the Americas. The human rights dialogues and consultations with Afghanistan, Belarus, Iran, Myanmar, and Russia remained suspended.

National Foreign Policy Initiatives

The same trend of diminished activity was evident at the national level: There were very few new democracy strategies as such, although several European states introduced new development plans that included some democracy-related commitments.

The French government launched an action plan to implement its human rights–based approach to development, with a new fund to support human rights defenders. The Netherlands moved to increase protection for female human rights defenders. The German Federal Ministry for Economic Cooperation and Development unveiled a new strategy for supporting civil society, with a priority focus on promoting gender equality. Additionally, the German federal government in February 2024 launched its first strategy for international digital policy, which includes measures to protect democracy and human rights in the digital space.

The Swedish government agreed on a new strategy for development cooperation with civil society.²⁸ Sweden also launched a new strategy for its global development cooperation activities in the areas of human rights and freedoms, democracy, and the rule of law. Spain’s new master plan for Spanish cooperation for 2024–2027 includes priority commitments to promote democracy, foster citizen participation, and safeguard human rights. The plan emphasizes in particular the need to close the gender gap through a feminist approach. This emphasis was reinforced by Spain’s 2024 co-chairing of the United Nations (UN) working group on feminist foreign policy.

In the Baltic states, Estonia adopted a new development cooperation and humanitarian aid strategy for 2024–2030 with an upgraded commitment to supporting democracy and a particular focus on “making technology work for democracy.”²⁹ In his annual foreign policy speech, Estonia’s foreign minister introduced a Fit for Freedom initiative to advance human rights worldwide as a part of the country’s security policy.³⁰ Latvia introduced a new development cooperation policy plan for 2024–2027, which focuses on promoting good governance, including the rule of law. Lithuania became an official provider of development cooperation according to the standards of the Organisation for Economic Co-operation and Development. The country’s new development aid focuses on sharing Lithuania’s postcommunist transition experience and knowledge of democratic reforms, especially in the countries of the EU’s Eastern Partnership.

European states, with the exception of Hungary, participated in the 2024 Summit for Democracy (S4D) in South Korea. More than a dozen European states led thematic working groups at the meeting. Yet, European governments did not invest significant political capital in the summit, and none explicitly offered to host the next gathering. Despite their involvement, European contributions lacked strong follow-through, and the summit ended without any clear commitments or a concrete road map for future editions. The change of U.S. administration throws the future of the S4D process into doubt.

The increased attention given to migration control at the EU level was also apparent in national priorities. The Polish government’s tougher migration strategy—designed to deal with crossings stoked by Russia at the border with Belarus—included a temporary suspension of asylum rights. Italy struck a return deal with Albania; after Italian courts ruled this illegal, the government promised to press ahead with finding stricter rules to curb arrivals.

Outside the EU, Switzerland launched a new international cooperation strategy for 2025–2028, which features democracy as one of its priorities, and the country’s Ministry of Foreign Affairs drew up a new democracy strategy. Meanwhile, Norway unveiled a new model for CSO partnerships that aims to be more flexible and improve strategic cooperation between the country’s development agency and CSOs that receive funding.

The new UK government promised to reengage with democracy support in a more committed fashion. The Foreign, Commonwealth, and Development Office devised a new democracy diagnostic tool, nominally to help ensure that UK foreign policy engagement with a given country does not harm democratic reform. In early 2024, David Lammy, who later became UK foreign secretary, presented his foreign policy vision of “progressive realism,” which focused, among other things, on fostering resilience against authoritarianism.³¹ However, this new doctrine was rooted in a focus on economic interests and strategic realpolitik, and democracy support did not feature explicitly in the UK’s announced “modern approach to development.”³² Existing UK democracy programming continued during 2024, but by year’s end, the new government had still not defined how it would develop such support in the future.

Finally, international conflicts had increasingly apparent spillover effects onto democracy policy. In the eyes of many around the world, Europe’s positions on the Middle East conflict undermined its credibility as a global advocate for democracy. In 2024, Ireland, Norway, Slovenia, and Spain formally recognized a Palestinian state.³³ Other European countries did not, and the EU generally remained hesitant to adopt firmly critical stances against Israel. While the conflict lies beyond the remit of this review, its knock-on impact for democracy policy was powerful in 2024. A running theme during the year was other countries’ complaints that European governments were firm in backing democratic self-determination for Ukrainians but not for Palestinians.

EU Internal Initiatives

The European Media Freedom Act entered into force in May.³⁴ The act is designed to safeguard media freedom and prevent political influence over media organizations across the EU, with the overarching aim of reinforcing the role of independent journalism. By addressing the union’s fragmented national regulatory approaches to media freedom, pluralism, and editorial independence, the act aims to improve the functioning of the internal market for media services and remove obstacles to the operations of media service providers across the EU. The legislation also aims to limit information manipulation in cooperation with the Digital Markets Act and the Digital Services Act (DSA). The new rules will apply fully from August 2025, and the European Board for Media Services will oversee the act’s implementation.³⁵

The commission’s annual rule-of-law reports concluded that progress had been made in some areas of judicial reform but noted overall declines in press freedom and media pluralism.³⁶

The 2024 reports were extended to include four EU candidate countries. Yet, the reports continued to be criticized for their lack of actionable recommendations and concrete follow-up mechanisms, along with the fact that there is no assessment of the EU itself.³⁷ In July, publication of the 2024 edition was reportedly delayed as von der Leyen curried favor with Meloni to help her reelection as commission president; the report was critical of Meloni's assault on press freedom.³⁸ In October, a group of academics published the first assessment of the EU institutions' performance on the rule of law, in which they criticized weak enforcement of rule-of-law standards and politically motivated decisionmaking.³⁹

The DSA advanced, and its rules started to apply to all platforms. The commission launched two whistleblower tools to make it easier for individuals to provide information on platforms' harmful practices.⁴⁰ Still, implementation of the DSA remained partial, and several investigations that had been opened by the commission, for example on political ads, were still to be properly carried out. The commission charged Belgium, Bulgaria, the Netherlands, Poland, and Spain at the end of the year with not having met their DSA obligations, as they had failed to either nominate or empower their national digital service coordinators as required.⁴¹ The commission issued DSA guidelines on election integrity, although these are not legally binding and do not cover political microtargeting. In December, the commission opened proceedings against TikTok under the DSA for failing to prevent disinformation and manipulation in relation to the first round of Romania's presidential election.

The EU's Regulation on Transparency and Targeting of Political Advertising entered into force in April after many delays in the legislative process. The new rules will increase the transparency of advertisements through measures such as labeling of political ads and the establishment of an ad repository. However, most of the rules will be fully applicable only from 2025—and from 2026 in the case of the provisions on the ad repository; most of the regulation was not applicable during the 2024 European Parliament elections. The law does not fully address the issue of microtargeting and has already led to Google and some other companies deciding to leave the European political ad market, alleging difficulties with compliance.⁴²

Meanwhile, the EU's AI Act entered into force in August, representing the world's first comprehensive regulation on AI.⁴³ It is designed to ensure that AI developed in the EU includes safeguards to protect fundamental rights. Member states have until August 2025 to designate national competent authorities to oversee the act's application. Most of the act's rules will apply only from August 2026. To bridge the transition period, the commission launched the AI Pact, which invites AI developers to voluntarily adopt the act's key obligations ahead of the legal deadlines.⁴⁴ CSOs criticized the act for lacking sufficient measures to prevent abuses of fundamental democratic rights and for prioritizing industry interests, security services, and law enforcement bodies.⁴⁵ In September, the commission signed the Council of Europe Framework Convention on AI, the first legally binding international agreement on AI, aimed at ensuring that AI systems align with human rights, democracy, and the rule of law.

Democracy and EU Candidate Countries

In 2024, the EU marked the twentieth anniversary of its largest wave of enlargement and pledged to push forward the integration of candidate and potential candidate countries across the Western Balkans and the union's Eastern neighborhood. The commission opened accession negotiations with Moldova and Ukraine. The incoming commission made enlargement one of its six main priorities. Enlargement remains a key instrument for supporting democracy and establishing a framework for democratic reform agendas in candidate countries. However, EU expansion has not yet been fully effective in preventing democratic backsliding in candidate states.

Separate from EU enlargement but covering the same region, the fourth and fifth summits of the European Political Community, held in the UK and Hungary, respectively, did not include any initiative on democracy support—although one of the community's working groups focused on cooperation to counter disinformation.

Ukraine

After the EU began accession talks with Ukraine, the union's 2024 Enlargement Package acknowledged the country's progress in judicial reform and anticorruption. Most EU financial aid to Ukraine is now linked to the enlargement criteria. In March, the €50 billion Ukraine Facility, designed to support Ukraine from 2024 to 2027, came into effect.⁴⁶ Oversight for the facility was moved from the parliament to the EU Council to win the acquiescence of Hungarian Prime Minister Viktor Orbán. The facility now links funding more tightly to reform progress by distributing grants and loans based on Ukraine's advancements on approved reforms. The EU also agreed on a loan of up to €35 billion for Ukraine, backed by frozen Russian assets and contingent on democratic reforms.⁴⁷

Still, the main priority in 2024 tilted even farther toward the military and financial support Ukraine needs to resist Russian aggression. On their first day in office, Kallas, Kos, and European Council President António Costa visited Ukraine with a message that the EU “wants Ukraine to win this war.”⁴⁸ Many EU member states signed security cooperation agreements with Ukraine; only a small number of these included democracy support.

Debates over conditionality sharpened: Ukrainian government officials felt that they had made progress on anticorruption, transparency, defense procurement, corporate governance, and other reforms without any reward from the EU or sufficient funds from the Ukraine Facility, which disbursed €16 billion in 2024.⁴⁹ But many CSOs complained the EU was being too soft and releasing funds before reforms had been implemented—and, indeed, while Ukrainian President Volodymyr Zelensky was centralizing power and limiting democratic freedoms beyond what was strictly required under martial law.

Moldova

In June, the EU formally launched accession negotiations with Moldova, and the 2024 Enlargement Package reported favorably on the country's democratic progress. The reelection of President Maia Sandu helped maintain momentum in Moldova's EU accession process. However, her narrow victories in the presidential election and a referendum to enshrine EU membership in the country's constitution suggested that the EU accession process needs to deliver more tangible benefits for a wider circle of the Moldovan population.

Challenges remained, as Russian disinformation campaigns and incidents of vote buying continued to strain Moldova's democratic institutions. EU support in cyber defense helped counteract these pressures, albeit by a narrow margin. The EU pledged more assistance to counter Russian information manipulation, which is likely to intensify in the lead-up to Moldova's 2025 parliamentary election. In October, the commission approved the Moldova Growth Plan—a €1.8 billion support package, the EU's largest aid allocation for Moldova since its 1992 independence—and stressed that disbursements would be linked to governance reforms.⁵⁰ Yet, not all developments were positive, as the pro-EU government proscribed some media outlets, while its decision to foreclose debate by enshrining EU membership in the constitution generated some frustration among parts of the population.

Georgia

Georgia was in turmoil throughout 2024. Following the EU's late decision to grant the country candidate status in December 2023, the Georgian government reintroduced a so-called foreign agents law that requires civil society and media organizations to register as pursuing foreign interests if they receive more than 20 percent of their funding from foreign donors. Despite large-scale protests, the law entered into force in August 2024.⁵¹ In response, the EU stopped high-level contacts with Georgia, froze its accession process, suspended €40 million of security-sector support from the European Peace Facility (EPF), withheld €121 million in annual budget support, and promised to use a large part of the suspended funds for civil society.⁵² The UK also suspended high-level contacts and security cooperation with the country.

The ruling Georgian Dream government also abolished gender quotas for political parties' lists of electoral candidates, adopted a legislative package on "family values and protection of minors" that further undermined democratic values, and said it would ban opposition political parties if it won the October parliamentary election.⁵³ Georgian Dream heavily manipulated the election to declare victory.⁵⁴ It then announced it was aborting accession talks with the EU until 2028.

As further protests erupted across the country, Georgia's crisis deepened. EU statements were rhetorically firm against the government, and some member states cut all aid to the government, Sweden being the first to do so. Still, the EU and its member states refrained from

insisting on a new election, instead announcing a technical mission to investigate electoral irregularities. The Baltic states and the UK imposed sanctions on Georgian politicians and officials, but the EU did not, mainly because Hungary and Slovakia blocked such measures. At the end of the year, Georgia continued in turmoil, turning ever more sharply toward autocracy and with its accession process moribund—at least for the moment.

The Western Balkans

The EU offered new initiatives to step up its engagement with the Western Balkans, and some accession talks advanced, while the region registered mixed trends in democracy during the year. In October, von der Leyen launched a Western Balkan tour and approved reform agendas for Albania, Kosovo, Montenegro, North Macedonia, and Serbia. These will make aid payments under a €6 billion Reform and Growth Facility conditional on democratic reform.⁵⁵

In October, Albania started its accession talks with the EU ten years after being granted candidate country status. Tiranë opened five new negotiating chapters toward the end of the year. Still, the commission called on Albanian authorities to intensify progress on fighting corruption and improving fundamental freedoms.⁵⁶ Under the reform agenda, the commission approved €922.1 million in nonrepayable grants and favorable loans for Albania, to be disbursed once the country meets democratic conditionality benchmarks.⁵⁷ Notwithstanding this progress, large-scale antigovernment protests took place across the country, with demonstrators critical of Prime Minister Edi Rama on a range of democracy-related issues.

In Montenegro, the government led by Prime Minister Milojko Spajić made progress on its EU integration path by addressing issues related to governance, judicial reform, and media freedom. In June, the EU-Montenegro intergovernmental conference noted that the country met overall interim benchmarks on the rule of law, allowing it to provisionally close other chapters of the accession talks.⁵⁸ Civil society criticized the hasty approval of legislative proposals to meet EU demands with little domestic debate. The government promised further amendments in response to this criticism, but the pro-EU coalition's defeat in September's snap local elections in the capital, Podgorica, caused some uncertainty in the political situation. Still, Montenegro closed three negotiating chapters at the end of the year, the region's first chapter closures for six years. Under the reform agenda, the commission allocated €383.5 million to Montenegro, again dependent on the country's democratization efforts.⁵⁹

With Serbia, accession talks made some, but less significant progress. Serbia's ruling party continued to tighten its grip on the country's institutions and media, pushing the country farther toward authoritarianism. In February, the European Parliament called for an in-depth investigation into electoral fraud in Serbia. The December 2023 local elections were

rerun in June 2024 after international pressure because of alleged irregularities, but the ruling party won a repeat victory. The German Foreign Office deemed the elections “unacceptable for a country with EU candidate status.”⁶⁰ In 2024, Belgrade’s crackdown against the freedom of assembly was especially severe.⁶¹

Despite this situation, the EU and member state governments deepened their economic cooperation with the Serbian government. In July, German Chancellor Olaf Scholz and the European Commission signed deals to grant the EU access to Serbian lithium, which is set to be mined by Rio Tinto. Concerns over corruption and environmental standards related to these deals led to a public outcry, further denting support for EU membership in the country.⁶² French President Emmanuel Macron signed eleven multi-billion-euro agreements with Serbian President Aleksandar Vučić, tightening cooperation in the areas of security, energy, and critical raw minerals, in particular.⁶³

The commission’s 2024 enlargement report signaled some advance in talks and insisted that Serbia had met the conditions to open another cluster of chapters in its EU accession negotiations. Civil society was highly critical of this assessment, given the government’s pronounced democratic backsliding. Indeed, local CSOs stepped up their criticism of the EU for whitewashing Vučić’s authoritarianism in 2024. The reform agenda set aside €1.6 billion for Serbia, although it was difficult to see how the country would come anywhere near meeting the reform conditions for this sum to be disbursed.⁶⁴

In North Macedonia, an electoral victory for the nationalist VMRO-DPMNE party cast doubts on some liberal rights and the country’s EU membership path. The party’s win was due in part to the EU’s failure to fully reward the country’s democratic progress in the 2020s or follow through on the historic 2018 Prespa Agreement, which was supposed to unlock EU accession by changing the country’s name to settle a long-running bilateral dispute with Greece. The new government now disputes this agreement, further complicating North Macedonia’s integration into the EU. Meanwhile, Bulgaria continued to demand further protection for the Bulgarian minority in North Macedonia, causing a new bilateral dispute to block the country’s progress toward the EU. The union decided to decouple North Macedonia’s and Albania’s candidacies to allow for the latter’s speedier integration.

The EU still did not respond to Kosovo’s 2022 application for membership. The commission said it was ready to prepare an opinion if the EU Council requested one. A visa liberalization agreement for Kosovars came into effect in January. The commission stressed the need for the government to respect the freedom of expression and the rule of law. The Kosovar government faced sharp EU criticism and pressure because of its reluctance to take steps to establish the planned Community of Serb Municipalities. Following a stark rise in ethnic tensions in North Kosovo, von der Leyen made efforts to bring the leaders of Kosovo and Serbia together but failed to broker an agreement. The commission’s reform agenda for Kosovo offered €882 million once reform conditions are met.⁶⁵

In March, the EU opened accession negotiations with Bosnia and Herzegovina, two years after the country was granted candidate status, although progress on the negotiating framework was slow. The commission promised €1.1 billion in nonrepayable grants and favorable loans when the Bosnian government met its reform agenda.⁶⁶ Bosnia and Herzegovina's progress toward the EU was held up, however, by democratic backsliding in the country's Republika Srpska entity. After the controversial criminalization of defamation in 2023, the Republika Srpska government proposed a far-reaching foreign agents law that curtailed the freedoms of speech and assembly. The government withdrew the legislation at the last minute, reportedly in part because of the threat that EU funds for the country would be frozen or withdrawn, but then announced that the law would be reworked and reintroduced in the future.⁶⁷

Democracy Aid

Together, the EU and its member states continued to be the largest global provider of official development assistance (ODA), but identifying how much external funding went to democracy aid remained virtually impossible, as European donors still did not specify these amounts. On the internal front, EU democracy support funding focused on projects to promote EU values, prevent gender-based violence, encourage citizens' political participation, and support media freedom and pluralism.

EU External Funding

In February 2024, the European Commission made changes to its external action budget following a 2023 review of the EU's multiannual financial framework. This shift meant more spending on security and migration, rather than democracy. Funding reallocations included the creation of the €50 billion Ukraine Facility, new funding for European defense, €2 billion more for migration and border management, an extra €7.6 billion for the EU's neighborhood and the world, and €1.5 billion more for the union's solidarity and emergency aid reserve.⁶⁸

The EU's Thematic Programs on Human Rights and Democracy and for CSOs were both reduced slightly, by €38 million each, to just under €1.5 billion in each case.⁶⁹ Further cuts are due for geographic aid budgets; these reductions will also eat into democracy aid. (Formally, 15 percent of geographic aid allocations are supposed to go to good governance, human rights, and democracy.⁷⁰) Country allocations under the Thematic Program on Human Rights and Democracy, the EU's main funding source for democracy aid, amounted to €95.5 million for the year (see table 1).

Table 1. Overview of EU Indicative Country Allocations for Human Rights and Democracy Activities in 2024

Region	Allocation	Top Country Recipient(s) (Allocation)
East, Central, and West Africa	€21.7 million	Democratic Republic of the Congo (€1.9 million)
EU neighborhood and Russia	€21.2 million	N/A
East, South, and Southeast Asia	€19.8 million	Bangladesh (€2.5 million)
Latin America and the Caribbean	€15.1 million	Mexico (€1.6 million)
Western Balkans and Turkey	€6.3 million	Turkey (€2.8 million)
Southern Africa and the Indian Ocean	€5.1 million	Madagascar (€1.1 million)
Central Asia	€4.0 million	Kazakhstan and Turkmenistan (€1.3 million each)
Middle East and the Gulf	€2.3 million	Iraq (€820,000)
Total	€95.5 million	

Note: These are indicative allocations announced as part of the action plan issued in 2022. Since then, funding for Russia and Belarus has been reprogrammed to support activities in Ukraine.

Source: “Multiannual Action Plan 2022-2024 for the Thematic Programme on Human Rights and Democracy,” European Commission, July 25, 2022, https://international-partnerships.ec.europa.eu/policies/peace-and-governance/human-rights_en.

In early 2024, the commission published a new midterm evaluation of the NDICI–Global Europe aid instrument, which focuses on the EU’s neighborhood, development, and international cooperation. On the basis of this report, the EU Council stated that the instrument was fit for purpose and met its objectives. The report did not push for any far-reaching improvement in democracy funding, although it did call for a more even balance between crisis responses and long-term development and a greater effort to strengthen local ownership of, and civil society participation in, aid projects—both familiar injunctions in EU documents for many years.

The Global Gateway included some modest democracy elements. The EU endorsed a list of 138 new flagship projects in 2024 under the initiative, amounting to around €12 billion, compared with €87 billion in 2023.⁷¹ While the Global Gateway is mainly an infrastructure program, it is ostensibly based on democratic values. Former European commissioner for international partnerships Jutta Urpilainen claimed that civil society and local authorities were “crucial partners in ensuring that Global Gateway investments address the needs of people and communities in a manner that is as accountable and as impactful as possible.”⁷²

Table 2. Number of New Global Gateway Projects by Regime Type, 2024

Regime Type	Number of Projects
Full democracy	3
Flawed democracy	30
Hybrid regime	49
Authoritarian regime	31
Mixed or regional projects	22 (of which 15 included authoritarian regimes)
No ranking	3
Total	138

Source: “Global Gateway,” Council of the European Union, February 7, 2024, <https://www.consilium.europa.eu/en/policies/global-gateway/>.

Still, governance or democracy were mentioned in only twenty-four projects—and the commission offered no information on what the democracy components of these projects amounted to. Only thirty-three of the 138 Global Gateway projects were in democracies, using the Economist Intelligence Unit’s 2023 classifications, and most of the investments benefited authoritarian or hybrid regimes (see table 2).

Within EU democracy aid, support for women’s empowerment and youth was a clear priority. The commission launched an €11.5 million Women’s Leadership Initiative as part of the union’s broader Women and Youth Democratic Engagement initiative.⁷³ The EU also provided €8.9 million to support Afghan human rights defenders and civil society, mainly those working on the rights of women and girls.⁷⁴

The EU continued its support for civil society and civic groups through various initiatives and calls for proposals throughout 2024. The most significant initiative was the EU System for an Enabling Environment for Civil Society, which was given a total budget of €50 million.⁷⁵ Delegations announced CSO support programs in Cambodia, Israel, Nigeria, Pakistan, the Philippines, Rwanda, Tanzania, Uganda, and Zimbabwe, ranging from €3 million to €10 million.⁷⁶ The EU held its third consultative group meeting with Belarusian activists and released another tranche of funds to them.⁷⁷

The union also continued to support human rights and democracy defenders. The Human Rights Crisis Facility had an indicative allocation of €5 million from the 2024 budget. Support in this area continued to be available through the EU Human Rights Defenders Mechanism, managed by ProtectDefenders.eu, which received an allocation of approximately €30 million in 2022 to cover its activities until 2027.⁷⁸ Additionally, the EU announced €10 million for the Global Campus of Human Rights for 2024–2026.⁷⁹

The Team Europe Democracy initiative, with a budget of €10 million, continued its activities in 2024, aiming to strengthen linkages between the democracy support community and donors. In late 2024, the initiative announced a series of grants to support research. Managed by the Belgian federal development agency, Enabel, and funded through Team Europe Democracy, another funding call was launched to support African entities to carry out research focusing on inclusive participation to foster a more united and cohesive society.

National Funding

Many European states, most notably France, Germany, the Netherlands, and Sweden, announced cuts in their overall development aid in 2024. France cut its aid by 15 percent, with a further 18 percent reduction set for 2025.⁸⁰ The Netherlands announced plans to reduce aid for CSOs by €1 billion from 2026, a 70 percent drop.⁸¹ The UK's aid budget for 2024 was forecast to be the equivalent of only 0.36 percent of gross national income once domestic spending on refugees is excluded—a record low in the last seventeen years.⁸² Governments could not specify how much of these overarching reductions cut into democracy projects, but it is almost certain that they did so.

Gender and women's empowerment remained priorities for European donors such as Austria, Finland, Italy, Norway, Portugal, and Spain. In early 2024, Spain pledged €101.6 million for activities that focus on gender equality and sexual and reproductive health and rights.⁸³ France launched the Laboratory for Women's Rights Online, a platform for dialogue and an incubator for projects that aim to combat gender-based violence online.

The Czech Republic slightly increased allocations under its Transformation Cooperation Program to €3.6 million in 2024 and €4 million in 2025.⁸⁴ The program's 2024 focus was on activities in Armenia, Belarus, Bosnia and Herzegovina, Cuba, Georgia, Kosovo, Moldova, Myanmar, Serbia, Ukraine, and Vietnam. Poland's democratization funding decreased in 2024, with key budget adjustments like the Solidarity Fund PL's allocation dropping from €8.3 million in 2023 to €6.2 million, although the country did restart support for the European Endowment for Democracy (EED) after the years of the unsupportive Law and Justice (PiS) government.⁸⁵ Conversely, Romania increased funding for its Democratization and Sustainable Development Fund.

Denmark upped its democracy funding significantly from approximately €49 million in 2023 to about €61 million in 2024.⁸⁶ The country's New Democracy Fund rose to €45 million in 2024 from €29 million in 2023, allowing exchanges between CSOs in Denmark and countries in the EU's Eastern neighborhood.⁸⁷ The Danish government also advanced its implementation of the Digital Democracy Initiative that it runs in cooperation with the European Commission. In May, the initiative launched a €40 million call for proposals to fight gender-based violence, foster climate activism, and boost youth engagement.⁸⁸

France's development budget was €8.7 billion in 2024. Through the French Development Agency (AFD), thirty-four projects, totaling €172.6 million, were financed in the governance sector—although not all of them were democracy related. France further developed the France-Africa partnership it had adopted in 2023, redirecting the country's support in the region to democracies as opposed to military regimes.⁸⁹ The AFD's NGO Committee approved the allocation of more than €24 million in grants to twenty CSOs for the implementation of twenty-one new projects.⁹⁰ Under the broader project Innov4Good, the French embassies in Malawi and South Africa announced calls for proposals aimed at boosting local governance, transparency, and accountability in the countries.

Ireland was an exception among EU member states as it increased its overall ODA, announcing that funding for the government's international development program would rise by €35 million to €810 million.⁹¹ A €7 million fund was available to Irish NGOs to carry out development projects abroad as well as to a limited number of international human rights organizations.⁹² The country also declared that €1 million would be channeled through Irish NGOs to local institutions in Moldova and Ukraine for capacity building.⁹³

Italy announced a cooperation budget of over €6 billion, of which approximately €52 million was allocated to activities that support government and civil society.⁹⁴ Belgium launched a civic space initiative to support civil society in fourteen partner countries, with an allocated budget of €8 million in 2023–2024.⁹⁵

The Spanish government allocated a modest €2 million to the Organization of American States to strengthen democratic institutions in Latin America.⁹⁶ Madrid continued to finance initiatives that promote gender equality through its Ellas+ programs; in 2024, thirteen projects received combined funding of €5 million.⁹⁷ Spain also announced a regional program to strengthen sustainable development in the Middle East and North Africa that included gender equality among its mainly economic priorities.

The Swedish government's new democracy and human rights aid strategy had a budget of €79.3 million in 2024.⁹⁸ Sweden also launched a new regional program for the Middle East and North Africa that included new funds for political reform and women's empowerment. Alongside this, Sweden's regional strategy for the Syria crisis in 2024–2026 promised support for civil society and greater accountability in the country. Sweden announced new funding for free media projects, increased its backing for persecuted journalists, and doubled its support for the Prague Civil Society Centre.⁹⁹ The Swedish government also announced increases in its funding to the EED and for independent media in Venezuela.¹⁰⁰

Outside the EU, Switzerland launched notable democracy support initiatives for civil society in Kosovo, anticorruption and accountability in Mozambique, citizen participation in Rwanda, and e-governance for accountability and participation in Ukraine. Meanwhile, Norway's international development budget for 2024 stood at €4.4 billion, of which €309.6

million went to governance and civil society. This sum included twelve agreements with civil society in developing countries, amounting to €87 million, and €6 million in support to civil society in Ukraine.¹⁰¹

EU Funding for Internal Democracy Support

Funding for supporting democracy in the EU goes through the union's Citizens, Equality, Rights, and Values (CERV) program. This program has four priorities: promoting the union's values, promoting gender equality, enhancing citizen participation and engagement, and combating gender-based violence. In 2024, the EU allocated €210 million to CERV.¹⁰² Around half of this amount went to defending the union's values. The program aimed in particular to mitigate threats to civil society: It allotted €75 million, the largest chunk, to NGOs that act as intermediaries and work on capacity building and regranting to smaller and grassroots organizations.¹⁰³

The program opened to Albania, Bosnia and Herzegovina, Kosovo, Serbia, and Ukraine, while Moldova is expected to join in the near future. The EU decided that CERV's priorities would shift somewhat for 2025, with the biggest allocation going to citizen engagement, including transnational projects on decolonization, migration, and Holocaust remembrance.

Examples of CERV calls in 2024 included two calls for proposals with a combined total of up to €35 million—one to prevent gender-based violence and support victims, and the other to address the causes of the gender care gap and implement the EU Pay Transparency Directive.¹⁰⁴ An additional call with a total of €36 million was launched for a three-year framework partnership agreement to support European networks, CSOs active at the EU level, and European think tanks in the areas of union values.¹⁰⁵ CERV funding was also used for projects to encourage citizens to vote in the 2024 European Parliament elections. Some of these projects focused on creating platforms for dialogue between citizens in different EU countries, raising awareness about the elections, and promoting political engagement, particularly among underrepresented groups, such as young people and marginalized communities.¹⁰⁶

Civil society had mixed feelings about the program. Some critics argued that it was difficult for small or grassroots organizations to access funding because of the intricate bureaucracy of the application process. Others felt that the program was insufficient in terms of addressing shrinking civic space in Europe, particularly in contexts where the rule of law is under threat.¹⁰⁷ CERV is the only EU program that supports CSOs in Europe, and it has been a lifeline for organizations in Central and Eastern Europe. But it is widely criticized for not providing sufficient funding for the needs of the civil society ecosystem.¹⁰⁸ This is viewed as all the more important as there are few funding mechanisms available to CSOs based in Europe for advocacy on democracy and human rights.¹⁰⁹

The EU continued to support media freedom and pluralism through a variety of programs and initiatives. Funding for media pluralism has increased significantly in recent years, with a total €295 million between 2018 and 2024.¹¹⁰ Cross-border initiatives, EU-focused reporting, and projects on tackling disinformation received the most funding. Yet, Central and Eastern European outlets were underrepresented, with no recipients in the top nine over this period.¹¹¹ The Centre for Media Pluralism and Media Freedom received funds to develop and implement the Media Pluralism Monitor. The EU also launched a third call for proposals for journalism partnerships, through which eight consortia of news organizations received a total of approximately €12 million.¹¹² Two further calls for proposals were dedicated to news media of special importance to democracy, such as investigative journalism, and to cross-border collaboration and innovation.

The EU supported a pilot project called LocalMedia4Democracy, which identified forty-two local and regional news deserts.¹¹³ Through this project, local media organizations received an investment of €1.2 million, with further support envisioned for four new projects.¹¹⁴ In an effort to combat disinformation, the EU launched a call worth €2.6 million for a pilot project to provide Russian households with trustworthy information.¹¹⁵ The union funded the Media Freedom Rapid Response Mechanism, with a budget of €3 million to monitor violations of press and media freedom across the EU and candidate countries.¹¹⁶ Under its Justice Program, the EU gave €42 million for training judges and improving access to justice and judicial cooperation.¹¹⁷

Finally, in a move to upgrade their long-standing funding, the EEA (European Economic Area) and Norway Grants—supported by Iceland, Liechtenstein, and Norway—launched a new Civil Society Fund, which the trio described as an “unprecedented commitment to strengthen democracy and human rights in Europe.”¹¹⁸ Through this fund, more than €300 million is set to reach CSOs, with a focus on advancing democratic values in the EU and contributing to the sustainable development of these organizations. The fund builds on previous financing provided through EEA Grants, which disbursed around €215 million for the period 2014–2021.

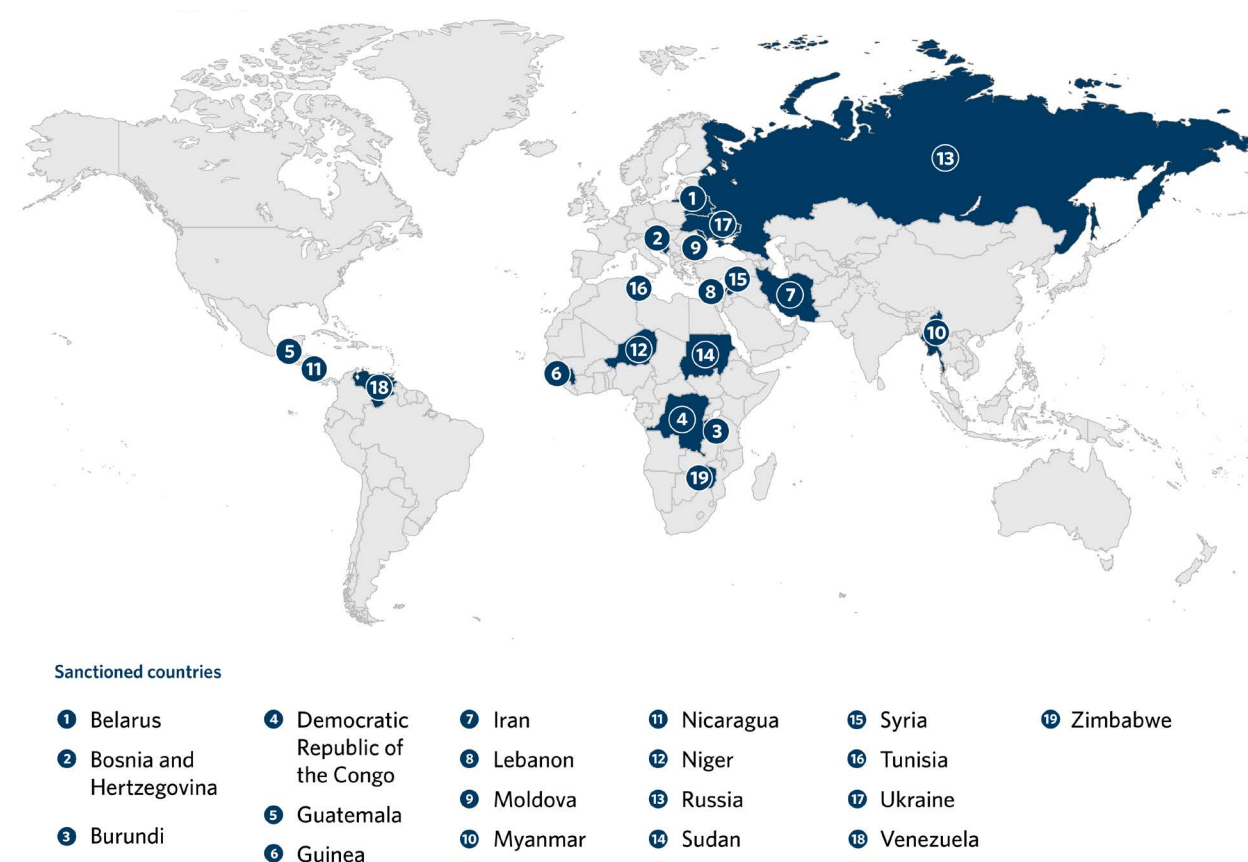
Sanctions and Democratic Conditionality

In 2024, the EU made modest use of its Global Human Rights Sanctions Regime, created new sanctions frameworks, and continued to update some of its existing frameworks. At the same time, however, the EU and its member states took little action against political repression and even deepened its cooperation with some autocratic regimes. Internally, the EU’s use of democratic conditionality increased but was still inconsistent.

Sanctions

The EU applied its Global Human Rights Sanctions Regime in 2024 to fifty individuals and thirteen entities.¹¹⁹ Briefly in February, there were discussions of the regime being renamed in honor of Russian opposition leader Alexei Navalny, who died that month, but this did not happen.¹²⁰ The EU still does not use the regime to a significant extent as a democracy promotion tool. The framework tends to target only a small number of mid-level officials in each country where it is applied. Following the regime’s renewal, at the end of 2024 it covered a total of 116 individuals and thirty-three entities from Belarus, China, Iran, Israel, Myanmar, Russia, and Sudan, as well as those associated with the terrorist organization Hamas.¹²¹ Nineteen countries were subject to various EU sanctions on grounds related to democracy and human rights (see map 3). Meanwhile, the UK’s global human rights sanctions regime applied to 115 individuals and twenty entities following an update in 2024.¹²²

Figure 3. Countries Subject to EU Sanctions on Grounds Related to Democracy and Human Rights, 2024



Source: EU Sanctions Map, last updated December 15, 2024, www.sanctionsmap.eu.

Note: This map is illustrative; boundaries, names, and designations used do not represent or imply any opinion on the part of Carnegie or the authors. Dotted lines represent approximate disputed boundaries. The final status has not yet been agreed upon.

The EU created a series of new sanctions regimes in 2024. Many of these formally targeted security issues rather than democracy as such, but in practice they crossed a line into democracy-related concerns, as they were imposed on nondemocratic regimes.

In January, the EU launched a new sanctions framework for Guatemala, motivated by the union's support for democracy as it aimed to "hold accountable those obstructing a democratic transition following the 2023 general elections."¹²³ These measures directly targeted those individuals and entities that sought to prevent the then-president-elect, Bernardo Arévalo, from taking power after his electoral win, which had been validated by the EU's EOM to Guatemala.

Later in the same month, the EU established a dedicated sanctions framework targeting those who support or enable the violent actions of Hamas and Palestinian Islamic Jihad. Through this framework, the union listed six individuals.¹²⁴ The EU then imposed further sanctions on Hamas, with a focus on its armed operatives, this time under the Global Human Rights Sanctions Regime, as well as sanctioning Israeli settlers in the occupied West Bank and East Jerusalem under the same regime. The UK proceeded in a similar manner, sanctioning seven groups that support West Bank settlers.¹²⁵

The EU continued to impose sanctions on Russia because of its aggression toward Ukraine. The union imposed two new restrictive measures in response to actions that undermined or threatened Ukraine's territorial integrity, sovereignty, and independence. These measures raised the total number of sanctions packages to fifteen.¹²⁶ In late 2024, the EU established a new framework for restrictive measures in response to Russia's destabilizing actions abroad against electoral processes and democratic institutions. The UK joined the EU in sanctioning Russian entities engaged in disinformation as well as three Russian agencies and three senior figures.¹²⁷ The EU updated its restrictive measures against Iran's military support for Russia's aggression in Ukraine, adding eight individuals and eleven entities to its list.¹²⁸

In 2024, the EU also renewed its sanctions frameworks on Bosnia and Herzegovina, Haiti, Iran, Myanmar, Nicaragua, Niger, Sudan, Syria, and Zimbabwe. In July, the EU updated its sanctions regime for the Democratic Republic of the Congo (DRC), raising the number of individuals to thirty-one and adding one entity.¹²⁹ Similarly, the union updated its sanctions regime for Belarus to include an additional fifty-four individuals for their participation in internal repression, bringing the total numbers of those sanctioned to 287 individuals and thirty-nine entities.¹³⁰ The EU also prolonged its sanctions regime in Sudan for a further year and renewed its restrictive measures against the so-called Islamic State and al-Qaeda. The EU adopted new sanctions to target people and entities who have links to Myanmar's military junta.¹³¹

The EU also sought to tighten measures against evasion of its sanctions regimes. It announced in February that it was preparing a directive for common definitions of criminal offenses and penalties for sanctions violations. The key development in EU sanctions policy

in 2024 was a sharper focus on more effective implementation, particularly in the face of news that Russia had managed to subvert sanctions through third countries.¹³² More and more companies have been accused of sanctions infringements, and enforcement is increasingly difficult; indeed, a large number of new civil society initiatives are monitoring lack of compliance and trying to press governments to tighten up.

Alongside these efforts, the EU set itself to be better equipped to hold businesses accountable for human rights abuses, as the union's Directive on Corporate Sustainability Due Diligence entered into force in July 2024. From 2027, the directive will impose human rights and environmental due diligence obligations on EU and non-EU companies. In cases of noncompliance, member states will be able to impose penalties of at least 5 percent of the company's worldwide net turnover.¹³³ Specifically for Africa, this measure will be complemented by a new, pan-African Responsible Business Conduct and Business and Human Rights program, to be implemented as of 2025.¹³⁴

Limited or No Measures

While the EU and its member states responded to electoral fraud and political repression in some countries, in others it did not—and in some places, it even deepened cooperation with autocratic and autocratizing regimes. Despite much rhetorical condemnation, the EU mostly declined to adopt any measures against autocratic repression. There were a small number of cases in which EU states reduced aid; Sweden, for instance, announced plans to phase out aid to Cambodia, Mali, and Yemen for a mix of democracy- and security-related considerations. Yet, such democratic conditionality was limited.

Latin America

In Venezuela, the EU condemned July's heavily manipulated presidential election and refused to recognize the result, which gave victory to the incumbent, Nicolás Maduro. The EU pushed Venezuelan authorities to provide access to voting records, condemned the persecution of opposition figures, and continued to support the opposition and civil society, while members of the European Parliament called for sanctions under the Global Human Rights Sanctions Regime.¹³⁵ Spain welcomed the Venezuelan opposition leader Edmundo González as a political asylum seeker, while Meloni followed the United States in officially recognizing González as Venezuela's president-elect. However, in 2024 the EU did not impose any sanctions beyond those introduced in 2017 (the EU and UK eventually added a modest 15 names to their sanctions listings after the end of the year, when Maduro was inaugurated in January 2025). Rather, the union supported dialogue efforts led by regional partners like Brazil and Colombia. It also allocated Venezuela €75 million in humanitarian aid.¹³⁶

Middle East and North Africa

After offering the Tunisian government a €150 million migration deal in 2023, the EU declined to react to further autocratization from the regime led by President Kais Saied. The EU did not adopt any punitive measures in response to the severely manipulated October 2024 presidential election, which secured Saied a second term, and only sixteen days later did the union issue a statement to express its concern about the vote.¹³⁷ The European Ombudsman filed a complaint against the European Commission's refusal to publish the findings of a human rights inquiry it conducted in Tunisia before the migration deal.¹³⁸ The EU also failed to respond to equally unfree elections in Algeria that handed another term in office to President Abdelmadjid Tebboune.

Although the EU in 2021 introduced a sanctions framework for Lebanon that allowed the union to impose sanctions against those responsible for undermining democracy and the rule of law in the country, the EU chose not to implement any measures under this regime, despite Lebanon's political situation deteriorating notably in 2024. The EU pushed for the election of a new president and reforms, but the union's focus was unsurprisingly on providing Lebanon with security cooperation and humanitarian assistance in response to Israeli attacks. The EU's €1 billion aid package, announced in May 2024, focused on mitigating immediate socioeconomic and migration challenges, not on political reforms.¹³⁹ France organized a donor conference for Lebanon, which successfully led to the pledge of €900 million in humanitarian aid and military training.¹⁴⁰ European leaders talked of the new context requiring deep political reform in Lebanon after the weakening of Hezbollah, but in practice, the focus was mostly on heading off the risk of state collapse rather than on imposing strict conditionality for democratic reform.¹⁴¹

The EU and Egypt agreed on a Strategic and Comprehensive Partnership with €7.4 billion of funding for migration control and general economic cooperation.¹⁴² The EU also offered the country a macrofinancial assistance package, signed under a procedure that circumvented a European Parliament increasingly concerned with repression in Egypt. The EU signed a similar migration and cooperation agreement with Mauritania and, at the end of the year, had further accords almost ready to sign with Jordan and Morocco. France reached new agreements with Morocco that totaled €10 billion.¹⁴³ In December, the EU agreed to release another €1 billion tranche of aid to the equally nondemocratic Turkish government for migration management.¹⁴⁴

The EU deepened its cooperation with the autocracies in the Persian Gulf region. The first regional security dialogue between the EU and the Gulf Cooperation Council (GCC) took place in January, and the first EU-GCC summit was held in October. The EU's special representative for the Gulf region, Luigi Di Maio, affirmed that the EU considered closer relations with the Gulf autocracies "precious" for European aims related to the war on Ukraine.¹⁴⁵ The EU and Gulf countries promised to build a strategic partnership for the twenty-first century, from which democracy was unsurprisingly absent.¹⁴⁶

In Syria, the EU considered a degree of reengagement with the regime of then-president Bashar al-Assad, before this dramatically fell in December. In July, a coalition of eight EU member states had advocated a reassessment of the union's policy toward the country.¹⁴⁷ Italy decided to reopen its embassy in Damascus, while countries like Belgium, France, and Germany—and the UK from outside the EU—preferred to move more slowly. After rebels unexpectedly ousted Assad at the end of the year, the EU released more humanitarian aid and moved to reopen its delegation in Damascus. European governments all agreed on the importance of an “inclusive transition,” although at this very early stage they did not specify any commitment to democracy as part of this; the December European Council conclusions did not mention democracy as one of the EU's key principles for reengagement with Syria.¹⁴⁸

Perhaps most controversially, the EU refrained from major critical measures against Israel, even as former EU foreign policy chief Josep Borrell and most governments expressed alarm at the death and destruction wreaked by Israeli tactics in Gaza and Lebanon. While Borrell repeatedly expressed concerns over the humanitarian situation in Gaza and called for sanctions on Israeli officials and a ceasefire, there was no consensus among EU member states for any wide-ranging sanctions. The UK announced a partial ban on arms exports to Israel; Belgium's region of Wallonia suspended licenses for munitions exports; Italy suspended contracts concluded since October 2023; Spain stopped all arms sales; and French authorities banned Israeli firms from the biggest defense show in Europe. Conversely, Germany doubled its arms exports to Israel.¹⁴⁹

Throughout the year, Ireland and Spain repeatedly called for a reassessment of the EU's trade deal with Israel on the grounds of Israel's noncompliance with the agreement's human rights obligations. However, the commission launched no such review. In November, Borrell proposed a ban on imports from illegal settlements and a suspension of political dialogue with Israel; EU member states did not agree to these steps. Not all member states said they would implement the International Criminal Court (ICC) arrest warrants for Israeli Prime Minister Benjamin Netanyahu and former defense minister Yoav Gallant. Hungary was most explicitly against the arrest warrants; the Czech Republic, Germany, and Italy were not clear in their positions; and France announced that Netanyahu was immune from arrest because Israel is not signatory of the Rome Statute, which established the ICC.

Sub-Saharan Africa

In Mozambique, despite the presence of an EU EOM, the EU did not take concrete measures in response to rigged elections, even after the assassination of two opposition figures, and despite issuing seven statements expressing concerns about the electoral process and the country's growing authoritarianism. After Mozambique's Constitutional Council upheld the ruling Frelimo party's widely contested victory, and as violence spread in the last week of December, an EU statement called for dialogue but was noncommittal beyond that.¹⁵⁰ In Uganda, despite legal proceedings against the 2023 Anti-Homosexuality Act, the EU allocated €200 million under the Global Gateway initiative.¹⁵¹

Despite the Rwandan government's long-standing support for militia forces, such as the M23 rebels in the DRC, the EU signed a new cooperation agreement with Rwanda on critical minerals. The deal is likely to fuel conflict in the DRC because of Rwanda's exploitation of minerals sourced illegally from DRC territory. France deepened its defense cooperation with Kigali and was later joined by the EU, which provided the Rwandan army with €20 million to fight the insurgency in Mozambique's Cabo Delgado Province—an extension to similar support provided in December 2022.¹⁵² Belgium, Germany, the Netherlands, and Sweden positioned themselves against the financing because of Rwanda's military activities beyond Cabo Delgado.

Asia

In Central Asia, the EU committed to build stronger partnerships with the authoritarian regimes in Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan, focusing on border management, energy, and connectivity. In June, the EU signed an Enhanced Partnership and Cooperation Agreement with Kyrgyzstan and welcomed some amendments to the repressive foreign agents law the Kyrgyz government had enacted two months earlier. In November, France adopted a joint declaration to strengthen strategic ties with Kazakhstan and signed its first-ever migration deal with a Central Asian country.¹⁵³

During the year, the EU issued frequent statements that expressed concerns about worsening repression in Azerbaijan but took no action. The union continued to define Azerbaijan as a “close” and “strategic” partner.¹⁵⁴ The EU put out critical statements about Azerbaijan's noncompetitive presidential and parliamentary elections but again took no concrete action.

In Bangladesh, in response to an unfree, government-controlled parliamentary election in January 2024, the EU issued only a generic statement that emphasized the need for an inclusive and transparent dialogue among political stakeholders. The union refrained from taking any coercive measures against the Bangladeshi government despite acknowledging that it was autocratizing. The EU was caught out by subsequent protests that ejected the government from power, expressing that it was “deeply concerned” about the violence and urging respect for the rule of law and democratic freedoms.¹⁵⁵ While the EU did not support the protests, it did hold off on a new cooperation agreement with Dhaka while the protests took place. Also in Asia, the EU declined to take any measures in response to the sentencing of forty-five pro-democracy politicians and activists in Hong Kong.¹⁵⁶

Trade and Arms Exports

Several horizontal instruments that cut across different countries were either modified or debated in 2024. The EU's Generalized Scheme of Preferences (GSP), which removes import duties from products entering the EU market from certain developing countries, was set to expire on December 31, 2023. The commission's proposed replacement scheme for

2024–2034 included upgraded political conditionality.¹⁵⁷ Member states did not agree on this proposal, so the old GSP arrangement was extended until 2027.¹⁵⁸ The EU did not use any of the conditionality provisions available under this scheme in 2024, even though several states covered by the framework suffered notable democratic backsliding.

The EU widened the humanitarian exemption to its sanctions framework as it sought to ease the delivery of aid in crisis situations, mainly in authoritarian states. The union also created a new aid mechanism called “actions in countries in complex settings” to continue channeling support into states like Afghanistan, Burkina Faso, Iran, Mali, Myanmar, Niger, Sudan, and Yemen.¹⁵⁹

Meanwhile, European arms exports to nondemocratic regimes increased significantly in 2024.¹⁶⁰ France rose to be the world’s second-largest exporter of major arms, ahead of Russia. Germany was the world’s fifth-largest exporter of such weapons, with big supplies to Egypt and Israel. Italy, the UK, and Spain ranked sixth, seventh, and eighth, respectively, all exporting large amounts to the autocracies in the Persian Gulf. In January, Berlin dropped its veto of sales of Eurofighter jets to Saudi Arabia.

Internal Measures

In a significant development, the European Commission closed sanctions proceedings against Poland after a new government came to power in late 2023. In February 2024, the commission unfroze €137 billion in Recovery and Resilience Facility (RRF) and cohesion funds, and in May it closed the article 7 process, under which the previous administration had been accused of undermining judicial independence.¹⁶¹ The new government demonstrated its readiness to restore democracy and discontinued disciplinary proceedings against judges. Yet, almost all reforms that require legal changes—such as the depoliticization of the National Judicial Council and the Constitutional Tribunal—were blocked by President Andrzej Duda, an ally of the previous government.

Policy developments toward Hungary were more mixed. The country continued to undermine democracy and weaken EU unity and support for Ukraine, and it established a new Sovereignty Protection Office tasked with investigating organizations that act in the “interest of a foreign nation or organization.”¹⁶² In July, Hungary assumed the rotating presidency of the EU Council and created a diplomatic uproar with uncoordinated visits to Moscow and Beijing. At year’s end, a total of €18 billion of cohesion and RRF funds remained suspended to Hungary, and in a first, the country permanently lost €1 billion after failing to comply with EU criteria on corruption and public procurement.

In February, the commission launched infringement proceedings against Hungary for the activities of the Sovereignty Protection Office, and in October it referred the country to the European Court of Justice. In a separate case in June, the court handed down a record fine of €200 million and a daily penalty of €1 million to Hungary for violating the

rights of asylum seekers.¹⁶³ In November, a full panel of judges held a hearing in the case of Hungary's anti-LGBTQ law, where a victory for the commission could have far-reaching implications for EU law, making the union's values directly enforceable. Two-thirds of Hungarian universities were also barred from participating in the EU's Horizon and Erasmus programs.¹⁶⁴

Yet, at the very end of 2023, the EU also agreed to unfreeze €10.2 billion to Hungary, ostensibly in response to judicial reforms. In 2024, the European Parliament moved to sue the commission for this decision.¹⁶⁵ The general perception was that the release of these funds was a quid pro quo for Hungary unblocking the €50 billion Ukraine Facility and was not warranted by any genuine legal reforms; von der Leyen denied that this was the case.

In Slovakia, Prime Minister Robert Fico attempted to bring public media, cultural institutions, and the prosecution of corruption cases under his political control. Following pressure from the commission, Slovakia amended the EU-specific provisions of its anticorruption law, avoiding the suspension of funds. The commission opened an investigation into Slovakia's new law to abolish the public media broadcaster Radio and Television of Slovakia. Former European Commission vice president Věra Jourová insisted the commission's rule-of-law report would serve as "a basis for structured dialogue" with Slovakia and that if concerns remained unaddressed, the country would "eventually face an EU infringement procedure."¹⁶⁶ By the end of the year, these concerns had still not been allayed.

The commission opened several infringement procedures to address human rights and democracy concerns in EU member states, for example on Roma rights in the Czech Republic and on legal access in Bulgaria. In many cases, the commission did not start such procedures, for instance on Bulgaria's new law on so-called LGBTQ propaganda, a Croatian law against whistleblowers, the Cypriot government's dismissal of the auditor general, and attacks on media pluralism in Greece. On a positive note, a five-year deadlock on judicial appointments in Spain ended after the commission helped broker a deal between the government and opposition parties in June.¹⁶⁷

Security and Peace-Building Interventions

The EU invested heavily in its security and defense capacities in 2024. Borrell suggested that this investment drew funds and policy focus away from other priorities: "We devoted financial resources that were meant to be spent better on sustainable development to be reallocated to strengthen defence and military production. This is a bad allocation of resources."¹⁶⁸

Under the EPF, the EU supported armed forces in a mix of democratic, hybrid, and non-democratic states. The EU made large allocations of humanitarian aid related to the conflicts in Afghanistan, Lebanon, Palestine, Sudan, Syria, and Venezuela—well in excess of the amounts allotted for democracy support. The EU held its second Security and Defense Forum, which did not feature democracy issues. In preparation for the forum, the union sought new security partnerships with several states, including those backsliding on democracy, like India, Jordan, and Nigeria. Hungary forged a new security pact with China to deepen law-enforcement and security ties.

A small number of EU Common Security and Defense Policy (CSDP) deployments featured human rights training. As an example, the EU Advisory Mission in Iraq led training sessions on human rights–based policing and was extended to 2026 with a new focus on women’s participation.¹⁶⁹ The EU updated its Guidelines on Children and Armed Conflict and the CSDP Checklist for the Integration of Protection of Children Affected by Armed Conflict. The union adopted a policy on due diligence in human rights and international humanitarian law for security-sector support to third parties.

The EU Advisory Mission in Ukraine extended its mandate.¹⁷⁰ With more budget and personnel, the mission now mentions support for the “re-establishment of the Ukrainian government functions and the rule of law in de-occupied areas” while linking support for the country’s law enforcement and reforms in the civilian security sector to “accession-related commitments.” This approach reflects a more geopolitical stance from the union, and from the CSDP in particular, by linking security with democracy in candidate countries. In 2024, the EU also agreed on a new Security and Defense Partnership with North Macedonia in addition to EPF support. The union adopted a similar partnership with Albania.

Mostly, however, democracy support was absent from CSDP developments in 2024. The EU’s military mission in Mozambique was extended to 2026 and rebranded the EU Military Assistance Mission with a focus on the responsiveness of the country’s armed forces, logistics, and operational planning.¹⁷¹ The EU gave EPF funding to Rwanda’s Defense Forces in Cabo Delgado and denied reports that EU-funded Rwandan troops in Maputo were involved in cracking down on demonstrators after Mozambique’s elections.¹⁷² According to a similar report, an EU-funded security force that trained police in Senegal was used to quell democracy protests in the country.¹⁷³ CSDP missions and operations drew scrutiny in 2024 for their weak track record on democracy.

The EU’s footprint in the Sahel region continued to fade. The union’s military partnership mission in Niger and the EU Training Mission in Mali were both wound down. Germany maintained a security training program in Mali but mulled its future throughout 2024. In Chad, the EU was critical of a rigged presidential election and continued to reduce its security presence. The Chadian government terminated French defense cooperation, while conversely, Hungary announced it would send some 200 soldiers to Chad, funded by the EPF, to help control migration.¹⁷⁴

Senegal's president called for the departure of French troops.¹⁷⁵ The EU recalled its ambassador to Niger after the junta there accused the union of supporting NGOs directly and bypassing the country's authorities.¹⁷⁶ Even though the situation in Sudan deteriorated, the EU's response after the UN Integrated Transition Assistance Mission in Sudan ended in late 2023 was limited; beyond the sanctions already on the regime, the EU took no action on democracy.

Conclusion

The year 2024 witnessed many important political developments, including European elections, Trump's reelection to the U.S. presidency, and, in many countries, contested or falsified votes that altered the balance between democracy and autocracy. In many ways, European democracy policies were obliged to wait until the dust had settled from these events and conditions allowed for a longer-term assessment of how to respond to the changes afoot. From the account offered above, several concluding reflections suggest themselves in respect of European democracy strategies during the year.

First, elections in the EU showcased a fairly robust set of democratic processes, which were not majorly distorted by outside or online interference and which passed their much-discussed stress test. In the wake of the elections, however, searching policy dilemmas have become even sharper. In both analytical and policy circles, debate has intensified over the far right and whether its surge has been contained or is only just gathering momentum, and whether this surge is fundamentally dangerous to democracy across the board. These concerns have spurred a flurry of new EU democracy protection initiatives, but these still have to prove their worth in tangible ways, and many fear that the far right moved in 2024 to inveigle itself more deeply into the mainstream of European politics in a manner likely to weaken democracy. The EU still lacks a consensually accepted template for how to deal with this challenge.

Second, the incoming European Commission and many in the new European Parliament have declared democracy to be a priority, mainly on the internal side. The commission is set to design a democracy shield to protect European political freedoms from outside threats to democracy, but this is not notably aimed at the root sources of those threats that lie in other countries' authoritarian power structures. The entirely necessary priority of holding external threats at bay risks becoming an overly dominant part of democracy policy at the expense of the EU either addressing its own democratic shortcomings or working proactively to empower citizens for democratic change in third countries.

Third, while our 2022 and 2023 annual reviews noted an emerging trend toward a more geopolitical variant of EU democracy support, this shift seemed to lose traction in 2024. The impact of the war on Ukraine in driving democracy-oriented geopolitics abated during the year. The rising salience of the Middle East conflict had almost the opposite effect to the Ukraine conflict, as it detracted from the clarity and legitimacy of EU strategic commitments in defense of democracy. As the EU redoubled its focus on security and defense at the beginning of the new institutional term, there were few fresh signs of security and democracy being brought into mutually reinforcing unison.

Indeed, at the end of 2024, there were some signs that the tide seemed to be turning in the opposite direction. The EU moved its quest for more self-protective autonomy into a higher gear, not least because of the likely problematic foreign policy positions of the second Trump presidency and the risk that these will create favorable tailwinds for authoritarianism. This preoccupying turn in the United States has created more of a need for the EU to lead on democracy issues and yet has also fueled an EU agenda that prioritizes other issues—trade and defense—that seem to be diverting attention and resources away from democracy support.

Fourth, EU accession processes, funding, and conditionality experienced a mixed year, and their impacts on democracy were equally variable. Some EU support helped protect democracy in Moldova and kept a focus on some governance reforms in Ukraine as the conflict there ground on. In Georgia, the accession process was frozen amid an autocratic lurch—a sobering failure of EU democracy policy, at least for the moment. While Montenegro got back on track in its enlargement preparations and revived some momentum on democracy, in most Western Balkan states, democracy and enlargement both atrophied, in apparent symbiotic connection.

Fifth, the trajectory of core external democracy support instruments and resources is concerning. The year saw signs of democracy aid being reduced or diverted to other objectives. The EU became even less willing to use critical measures for democracy support or to build democracy elements into its security missions. As the EU reached out to many nondemocratic regimes for security partnerships and economic interests, democracy appeared on shakier ground in the core priorities of EU foreign policy. The union's promise was increasingly to build democracy into other areas of aid and diplomacy, like the Global Gateway, rather than pursue it as a stand-alone policy. This idea is not without merit, but for now it seems to be short of concrete initiatives and therefore risks emasculating more than revitalizing the external democracy agenda.

Overall, the EU's democracy support record in 2024 can be described as mixed at best, with the union chalking up several major successes as well as registering significant shortcomings (see box 1).

Box 1. The EU's Five Best and Worst Moves for Democracy in 2024

The five clearest pro-democracy steps:

1. The EU upgraded its work against disinformation and online manipulation in the context of the European elections.
2. The EU gave a supportive response to Poland's democratic recovery.
3. The EU opened accession talks with Moldova and Ukraine and launched the Ukraine Facility, tied to democratic reforms.
4. The EU gave its positive support and imposed sanctions to help the democratic turnaround in Guatemala.
5. The EU suspended Georgia's accession process and aid to the country.

The five worst decisions for democracy:

1. The EU released funds for Hungary.
2. The EU gave a weak response to Israeli actions in Gaza and Lebanon, and exerted no democratic leverage in Palestine.
3. The EU issued high levels of new funding to autocracies in the Middle East and North Africa.
4. The EU signed a memorandum of understanding on critical minerals with Rwanda.
5. The EU signed an Enhanced Partnership and Cooperation Agreement with Kyrgyzstan after the country introduced a repressive foreign agents law.

Looking Ahead to 2025

With reductions in development funding across many European states, EU-level cuts are highly likely when the commission makes its first proposal for the 2028–2034 EU budget in the summer of 2025. Democracy supporters will be watching how far these cuts impact democracy funding. A more limited amount of EU money would be much more effectively spent in open and less corrupt countries. The budget will also provide an indication as to

whether the EU will start to back up its recent push for policies to defend democracy in Europe with resources for civic groups, media, and academia to support the implementation of those policies.

The reemergence of competitiveness as a top political priority may come into conflict with the EU's digital agenda in 2025. As member states grapple with the AI revolution, there is a risk that the rules agreed on in recent years, such as the DSA and the AI Act, become hostages to competition with China and the United States, to the detriment of democratic safeguards and oversight.

This review has highlighted the prevalence of migration as a key driver of EU politics in 2024, and this trend looks likely to continue in 2025. The negative impact is twofold: First, the salience of migration as a political issue is driving the electoral successes of numerous extremist parties in Europe. Second, migration deals with neighboring states mean that the EU is sending funds to autocratic countries or undermining international human rights principles in the vain hope of dealing with the problem. If the trend becomes more prominent, it will be extremely bad news for democracy supporters. Syria's change of regime opens a degree of reformist opportunity but may also aggravate migration and security pressures in 2025 if instability ensues; finding the right policy toward the new Syria will certainly be one of the EU's main challenges in 2025.

In a similar light, the combination of an EU focus on protecting democracy in Europe, a new Trump presidency, and the weakened links between democracy and geopolitics suggests that external democracy support is heading for rougher waters. Given these trends, how rough things become is likely to depend more on the actions of citizens around the world who force a change of narrative than on EU policy planning.

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