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POLICY BRIEF

RISE TO THE CHALLENGERS: EUROPE'S POPULIST PARTIES AND ITS FOREIGN POLICY FUTURE

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SUMMARY

- Europe's "challengers", or populist parties, are increasingly influencing the continent's foreign policy.
- They differ significantly, with their divergences largely rooted in their contrasting histories, strategies and domestic interests.
- However, they also exhibit a broadly common set of instincts which challenge the vision of Europe and the world that has long dominated the foreign policy of traditional parties.
- Mainstream parties will have to adapt to these parties to establish coalitions for European sovereignty in the future.

Dresden 2029

It is August 2029. As world leaders gather by the river Elbe for their family photo at the G8 summit in Dresden, the result is an image that would have seemed unthinkable only a few years earlier. The octet has been reconstituted, after 15 fallow years, following US president J.D. Vance's last-minute insistence on inviting Vladimir Putin back to what, since 2014, had been the G7.

The two stand in front of the host. Germany's bedraggled chancellor Friedrich Merz now leads a minority government reliant on the votes of the far-right Alternative for Germany (AfD, now the largest force in the Bundestag). Flanking him are French president Jordan Bardella and newly elected British prime minister Nigel Farage. Behind them stand two women: Ursula von der Leyen, the outgoing European Commission president, and her incoming successor, former Italian prime minister Giorgia Meloni (whose own successor in Rome, Giuseppe Conte, has somehow talked himself into joining them on the back row). Canada's prime minister Mark Carney and Japan's prime minister Shigeru Ishiba make for a lonely duo off to the sides, representing the two centrist holdouts among the governments present.

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It would be an error to assume the rise of Europe's populist parties will continue inexorably into the future, or to overlook their significant weaknesses and vulnerabilities. But the scenario above nevertheless remains a conceivable possibility. As such, the developments it entails deserve serious consideration in foreign-policy circles in Europe and elsewhere. What would it mean for the continent's place in the world, should its political balance finally tip from the old mainstream to parties well beyond it?

For that is the uneven, messy, but unmistakable direction of events as they stand. At the time of writing, parties of the radical right have topped recent polls of voting intention in the continent's four most populous democracies: Germany, Britain, France and Italy. Such parties already hold cabinet seats in six EU states, heading governments in Hungary, Italy and Slovakia. They are close to power (leading recent polls or propping up governments) in nine others. Following the European Parliament election in June 2024, the third- and fourth-largest groups in the EU legislature are the radical-right Patriots for Europe and the European Conservatives and Reformists (ECR), respectively. Most recently Karol Nawrocki, backed by Poland's populist Law and Justice (PiS) party, narrowly won the country's presidential election on June 1st.

The tilt away from the European mainstream is an overwhelmingly—but not exclusively—rightist phenomenon. In some places, it is part of a wider polarisation hollowing out the old political centre. For example, in France, the left-populist Jean-Luc Mélenchon came within a couple of percentage points of the presidential run-off votes in both 2017 and 2022. Germany's federal election in February 2025 saw the Left party (a descendent of the East German communists) and the Sahra Wagenknecht Alliance (the BSW, a more socially conservative splinter from the Left) obtain 14% of the vote combined. In Italy, Conte's Five Star Movement (M5S)—an anti-establishment party hard to place on the left-right spectrum—remains a significant force in the poorer south.

Many characteristics separate this array of populist parties. Some are committed to their country's, and to Europe's, liberal democratic order; many others agitate against it. Some are open to compromise and seek establishment acceptability, coalition deals and middle ways; others are purist and hold out for hardline, majority government. The radical left tends to respect minority rights and democratic pluralism to a much greater extent than the radical right. From a foreign-policy perspective, however, the radical right, the radical left and heterodox newcomers all sit, to varying degrees, outside the legacy European consensus on external affairs that broadly unites Christian democrats, social democrats, liberals and greens.

This is not to say that some of the more radical parties do not agree with parts of the consensus. But they are united by a lack of genealogical loyalty to the old global order and its ideas. With the partial exception of the greens, a younger force on the political scene, the traditional party families forged democratic Europe's foreign-policy consensus in the decades of the cold war and its immediate aftermath. Today they cleave to NATO and a broadly Western-led global security and economic order; to the multilateral system built by the victors of 1945; to (ostensibly at least) a rules-based order, international law and human rights; and to a European project that aspires to be a pillar of all of these.

But political forces currently on the rise in Europe generally do not possess that loyalty. Few of them were involved in shaping it. Some define themselves against it. Now, having long focused on national priorities, they are developing their own foreign-policy strategies. Many parties have shifted from opposition to the EU to attempts to change it from the inside. They are showing up together more often at joint events like the "Make Europe Great Again" rally in Madrid on February 9th 2025, presenting a new "illiberal internationale" to the world.

As the United States pivots towards illiberal democracy under President Donald Trump—a process which may yet reinforce similar trends in Europe—the new administration in Washington has made clear its partisanship. It is willing to press a thumb on the European political scales to support those parties it sees as its ideological allies.

Further complicating an already intricate picture is a trend in certain areas towards a blurring of the policy divide between older, establishment parties and newer, anti-establishment ones. For now this largely applies to domestic policies, and those foreign policies directly adjacent to them (most obviously migration, where the whole consensus is shifting in a more restrictive direction). But it is not hard to imagine the ripples from the Trump administration (favourable towards Putin, protectionist, unilateralist) further muddying the European political waters.

Together, these developments pose three big questions:

1. **What is the foreign policy of these parties?**
2. **What would the continued growth of their power and influence mean for Europe's posture towards the wider world?**
3. **What will this mean for European policymaking?**

This policy brief seeks to shed light on the answers, through an in-depth survey of ECFR experts on the foreign-policy positions of 16 of the EU's most significant outsider parties. These parties are new and old, from different parts of the continent, left and right in their political identities. They are not the only such parties of note. But together they provide a revealing overview of the challenge to the old European mainstream.

The study offers three main answers to the above questions.

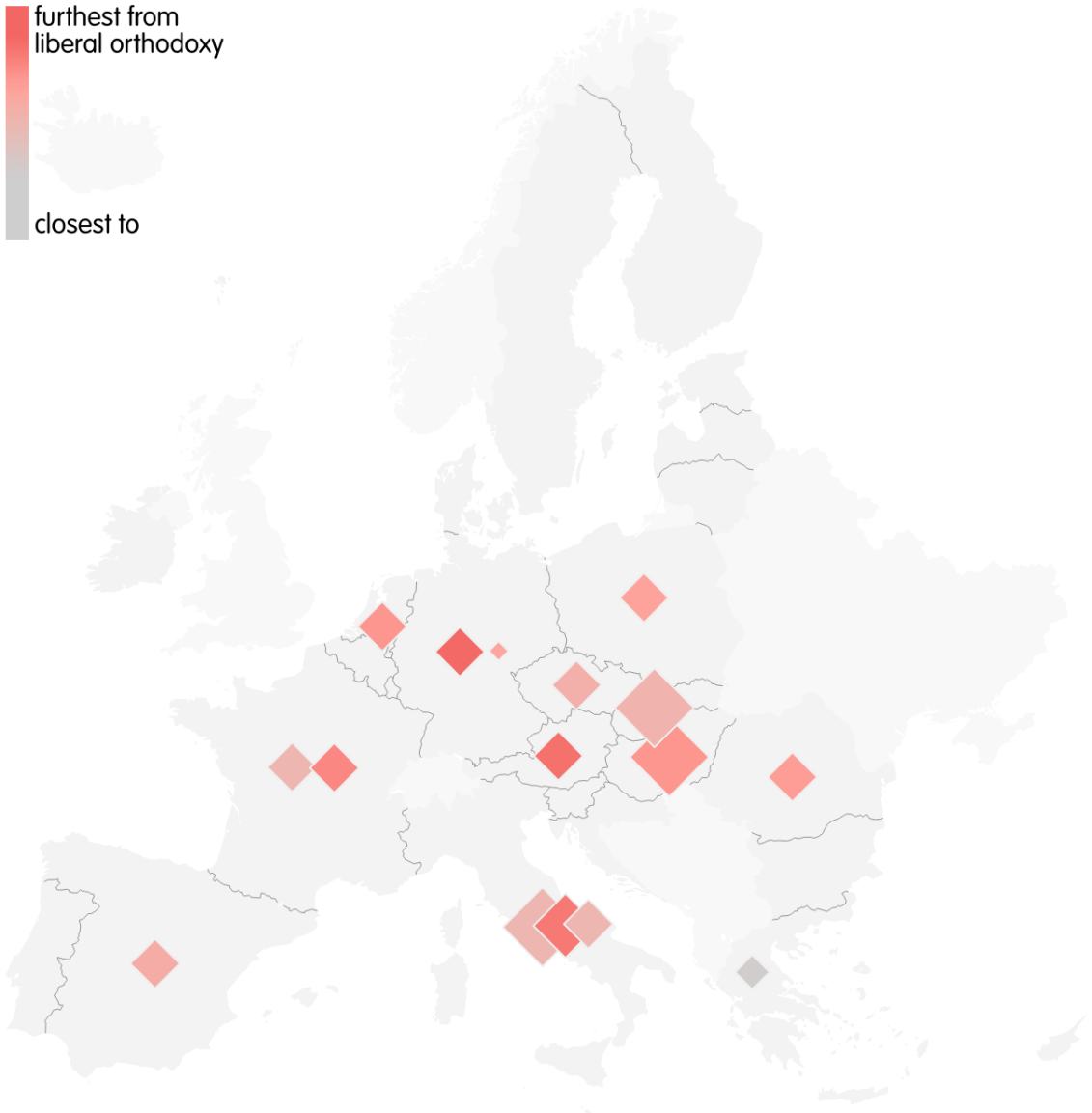
- On the first: for all the parties' diversity, significant trends are discernible among their foreign-policy outlooks. These include a nuanced scepticism towards European integration and Atlanticist shibboleths, a conciliatory approach to Russia and China, and anti-establishment instincts on climate and trade.
- On the second: these outlooks constitute an ideological and practical challenge to an establishment whose legacy views on world affairs are themselves under growing pressure from geopolitical events. An array of possible futures are conceivable, and they pivot especially on these parties' response to Trump's second term.
- On the third: this indicates that European foreign policy making in the near-future will be characterised by intensified ideological clashes, new coalitions, and domestic political flux and fragmentation. The recent nail-biter elections in Poland and Romania, as well as the collapse of the Dutch government on June 3rd, were all auguries of things to come.

This brief also proposes a new term: challengers. It describes those parties of right and left, and left-right hybrids, that sit outside the conventional European foreign-policy establishment and are increasingly contesting its dominance.

Finally, it projects its analysis onto the next four years. It advances several conceivable (but speculative) scenarios depicting the challengers' influence on European foreign policy. And it presents today's policymakers with advice on how to act on these possibilities in the interests of European sovereignty.

Challenger foreign policy

Location and political weight of challenger parties studied



ECFR's network of experts scoured hundreds of speeches, statements and voting records to determine where a selection of challenger parties sit on a spectrum ranging from one (total adherence to European liberal orthodoxy on a given subject) to five (total departure from that orthodoxy). The below table presents the foreign-policy positions of challenger parties and a brief factsheet on each party's outlook. Full details of the methodology can be found at the end of this paper.

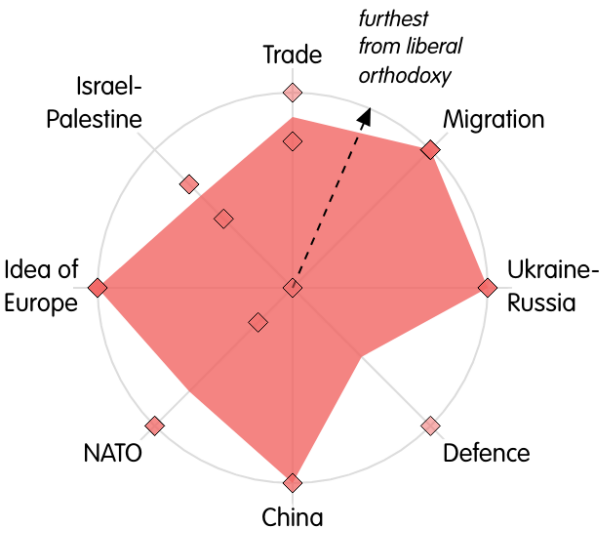
Alternative for Germany (AfD) Germany


Alice Weidel


Tino Chrupalla

→ Right
Party group: Europe of Sovereign Nations
15 MEPs
Founded: 2013

Power in its country:
3/5: represents significant (>10%) share of vote



Background
The Alternative for Germany (AfD) party, founded in 2013, is among the most ideologically purist of the right-wing challenger parties. Under Alice Weidel and co-chair Tino Chrupalla, **the party has become Germany's most prominent far-right force, championing anti-immigration, anti-globalism and anti-American positions**. While the AfD polls consistently as the country's second-largest party (even leading a couple of recent polls), it remains politically isolated by the mainstream parties' "firewall" around it. Still, the AfD continues to shape debates on sovereignty, migration and energy—and some cracks in the firewall have started to show.

European policy position
The AfD was previously part of the Identity and Democracy group along with the likes of France's National Rally, but was expelled after allegations of espionage—and allegations that the AfD's lead candidate in Europe, Maximilian Krah, had made statements downplaying the

Photos: Sandro Halank, Wikimedia Commons, CC BY-SA 4.0

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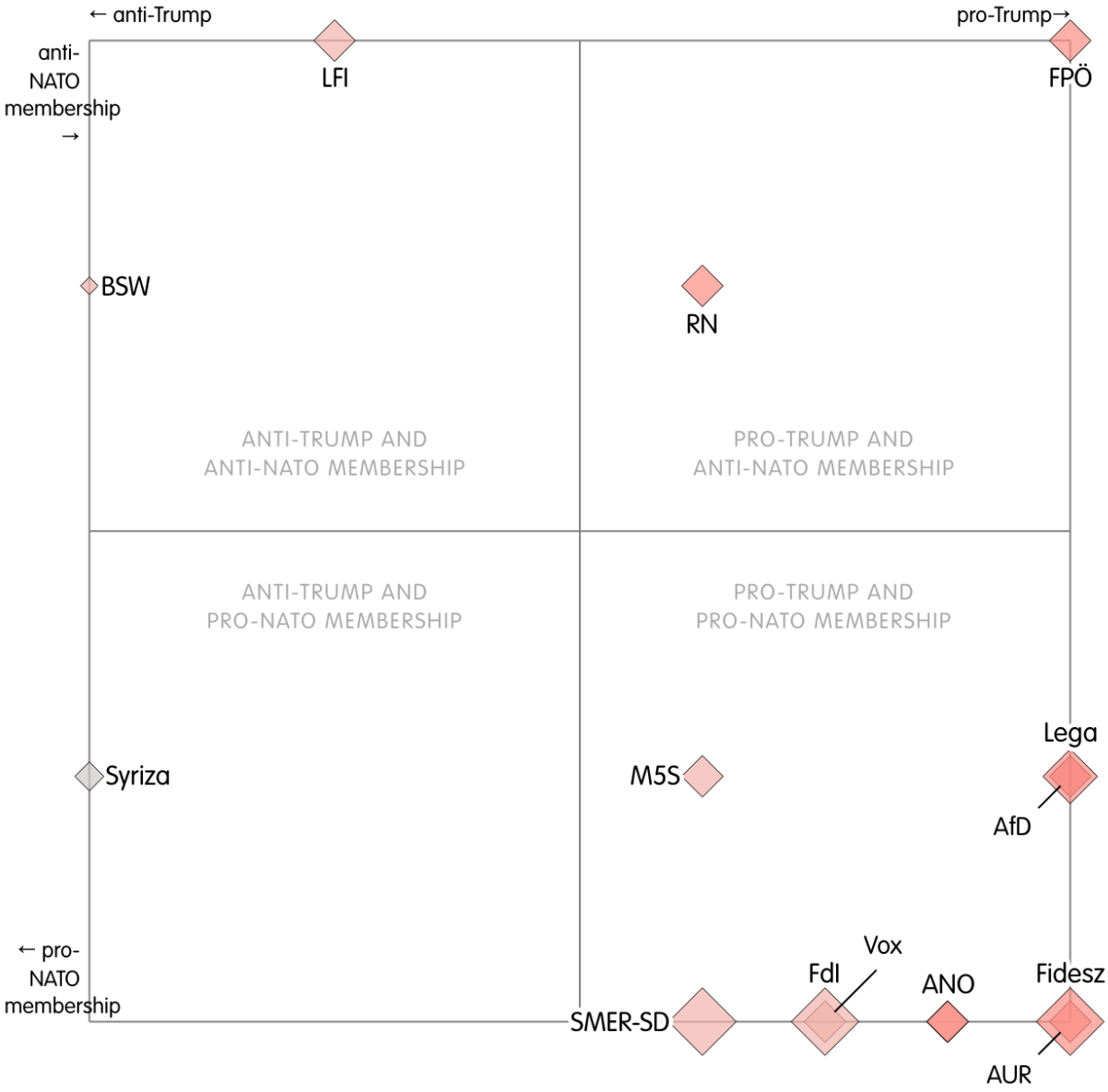
At first sight, the parties can seem quite distinct. The following analysis takes those faultlines into account. But it also argues that, once local circumstances and nuances are considered, many challengers are striking in their similarities. The parties' origins outside the old mainstream mean they gravitate towards policies that defy the conventions of the post-cold war age:

- Challengers tend to be sceptical of EU integration and supra-national constructs like NATO or the United Nations.
- They strongly prioritise national interests and prefer case-by-case, often mercurial approaches to international alliances and partnerships.
- Most challengers are traditionally anti-American, but most also want to ride the Trump wave—and would prefer not to choose between those imperatives.
- Almost all challengers have greater affinities with the regimes of Russia and China than is typical in their countries' political classes.
- Few challengers are open to defence integration or military interventions that go beyond defending their countries' own borders.

The challenger parties' common ground comes clearly into view on eight topics of major importance to Europe today, charted by ECFR's expert scores and factsheets.

1. The new transatlantic relationship: A Euro-Trumpian tightrope

Pro-Trump v pro-NATO membership



How powerful is party in its country's political landscape?

1/5: quite marginal on the domestic scene

5/5: leads government

Party's overall score, from closest to liberal orthodoxy to furthest from

Pro-Trump positions represent aggregate of parties' scores provided by ECFR local experts on alignment with and enthusiasm for Trump

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The story of European challenger parties and the second Trump administration is less straightforward than it may seem. On the one hand, many are encouraged by developments in the US. Some explicitly admire the president's "anti-woke", authoritarian agenda, often encouraged by interventions from the US administration itself. Notable true believers include Hungary's Fidesz, Italy's Lega (the League) and the Dutch Party for Freedom (PVV). Nawrocki paid a high-profile visit to the White House during the Polish election campaign, to PiS's delight. Others welcome the new administration more cautiously, such as Bardella's and Marine Le Pen's National Rally (RN)—embracing the disruption Trump brings as a chance to effect wider change.

On the other hand, Trump also complicates matters for many challenger parties. Some are historically anti-American. Recent ECFR polling suggests challenger party supporters tend to see even Trump's US as a mere "partner" rather than an "ally". The administration's tariffs and aggressive support for US tech firms (viewed with caution by many Europeans) could alienate its supposed fellow travellers in Europe. Being associated with Trump's radicalism could also harm some of these parties' normalisation strategies at home. As Jeremy Shapiro and Zsuzsanna Végh argued in a recent ECFR commentary: "The Trump administration's culture war in Europe is running headlong into his trade war and his general toxicity [there]".

In many cases, the challengers are treading a delicate line between embracing Trump and keeping their distance. Witness Bardella cancelling his speech at the Conservative Political Action Conference in February 2025, after Trump lieutenant Steve Bannon performed a Nazi salute at the event. However, these two impulses can be hard to separate, as in the case of the Madrid "Make Europe Great Again" gathering. Did this slogan mean: make Europe Trumpian? Or did it mean: restore Europe on its own, distinct terms?

FAULTLINES: While most challengers are trying to find a middle ground between national political independence and admiration for Trump, a subset remains more sceptical. Germany's left-conservative BSW, distinct to the challenger left on many other topics (including migration), aligns with the likes of Mélenchon's France Unbowed (LFI) and Greece's Syriza in supporting continued distance from the US. Meanwhile Italy's M5S remains studiously neutral—despite Conte's attempts, when he was Italian prime minister, to woo Trump during the latter's first term.

2. Russia and Ukraine: The road to normalisation

Challenger relations with Russia tell another story of tensions. Many right-populist parties have long viewed Putin's regime as a model of strong, nationalist leadership in the face of supposedly relativist, multiculturalist Western decadence. With certain exceptions, their

openness to Moscow has mirrored their longstanding scepticism about Washington.

So Russia's invasion of Ukraine, an assault on a country's sovereignty allegedly carried out in the name of anti-imperialism, has discombobulated some of these parties, forcing them to rein in their pro-Putin impulses. The RN repaid a politically awkward Russian loan in 2023. In Britain, Farage and his Reform party (not covered in this study but exemplary of many challenger traits) have heavily qualified his past expressions of admiration for Putin.

But now things are changing again. At the time of writing, Trump is seeking to negotiate a deal between Kyiv and Moscow on terms seemingly more favourable to the latter. This is rousing some challenger parties to revert to their pre-2022 instincts. For the AfD, Fidesz and Slovakia's Smer-SD, this takes the form of emboldened calls for peace on terms highly unfavourable to Ukraine. Often these are framed in terms of European living standards and energy security.

A "challenger" peace deal in Ukraine would be defined by the following three assertions. First, negotiations should take place under US auspices, as Trump is seen as a peace broker. Second, Ukraine should be more flexible in accepting peace conditions. Third, Putin has been isolated for too long and should again be accepted into European diplomatic circles. More generally, challenger foreign policy looks keenly beyond the war to a new European security order in a multipolar world.

FAULTLINES: The obvious exceptions are those rightist challengers historically affiliated with Atlanticism. PiS in Poland was a right-wing offshoot of the country's anti-communist Solidarity movement so, like most of the Polish establishment, is instinctively hawkish on Russia. The post-fascist roots of Meloni's Brothers of Italy (FdI) made it historically favourable to NATO as an anti-communist bastion during the cold war. The party's rush towards normalisation under her leadership saw it achieve European respectability by emphatically embracing Ukraine. Spain's Vox, too, is more Atlanticist than other right-wing challengers.

3. Migration: The big convergence

Migration is where the broad consensus among challengers (on the right, at least) is most obvious. Even where the likes of the AfD, PiS, Smer-SD and Vox disagree on other topics, they—along with the majority of the challenger spectrum—take a markedly restrictive view. Challengers generally want to reject more asylum seekers and use EU funds to build a physical European border. Their discourse typically associates migration with terrorism, Islamism and criminality.

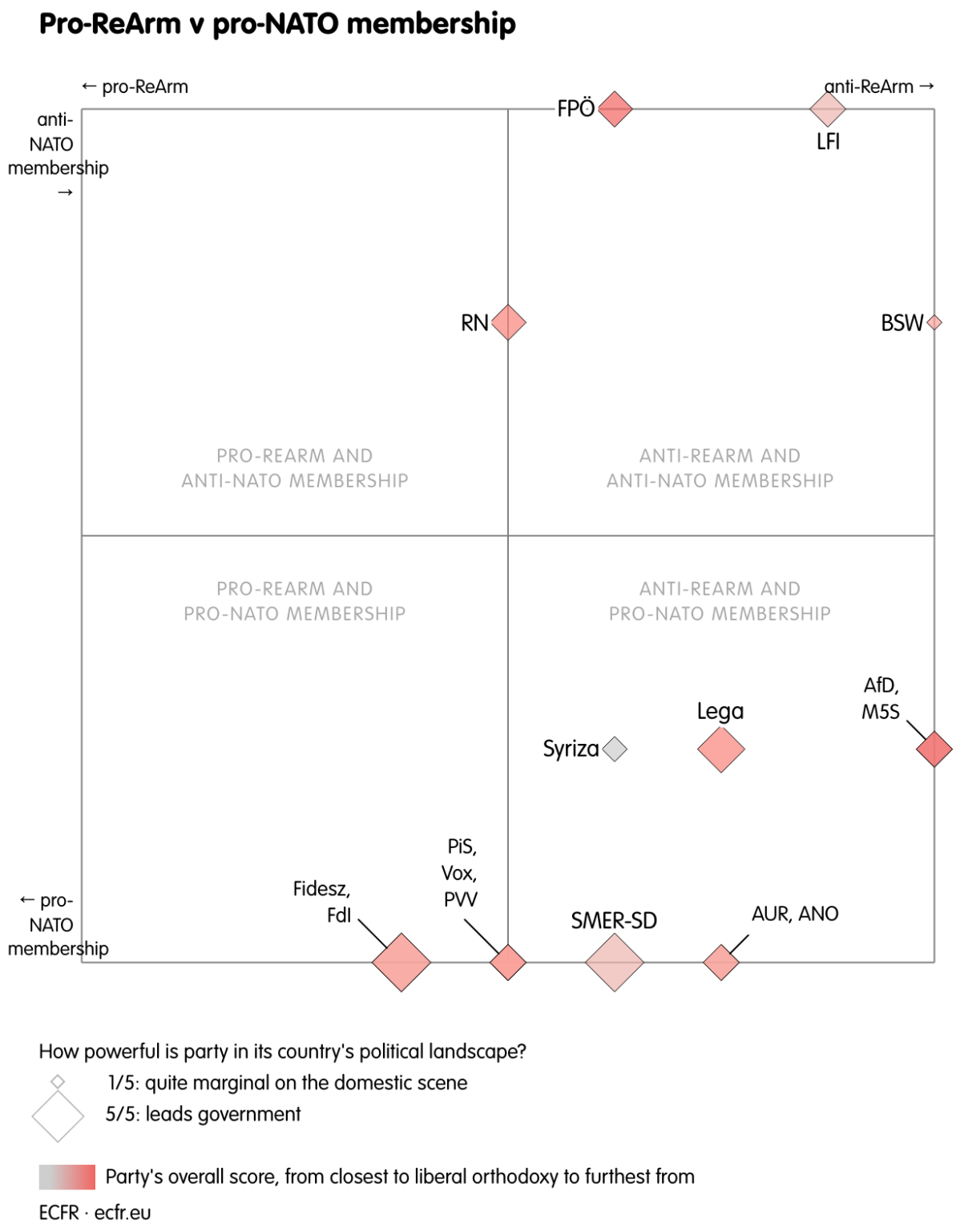
Another striking feature is the convergence between these parties and much of the European

mainstream. Some challengers, like the RN, have moderated some of their old overt xenophobia, while mainstream parties are hardening their own positions on migration. This means that, on some issues, the two camps are coming together. For example, Le Pen greeted French president Emmanuel Macron's 2023 draft immigration law as an "ideological victory". In January 2025, Merz used AfD votes to pass a Bundestag motion on border controls, hammering a crack into the country's political "firewall" that censures cooperation with the party.

Meloni, in particular, personifies the trend. Italy's prime minister hails from a post-fascist tradition but has made common cause with von der Leyen on elements of migration policy, particularly deals with North African countries and new models of migration management like with Albania. The challengers' once most distinctive foreign-policy position is becoming hardest to distinguish from those of the old centre.

FAULTLINES: Within the challenger camp, left parties—the BSW aside—tend to be closer to liberal orthodoxy on migration. Greece's Syriza and Mélenchon's LFI, for example, align in a more permissive position. Italy's M5S has tried to hedge between the two poles; closer to the challenger right on asylum and the EU's new migration pact, but opposed to fence-building.

4. Security and defence: A Europe of nations



If challenger migration policy is a story of alignment, then security and defence constitute one of rapid transformation. Many of the parties have been traditionally wary of NATO and other forms of Western military coordination. But a darker security landscape has caused some notable shifts. Some, like the RN and the Alliance for the Union of Romanians (AUR), have slightly moderated their enthusiasm for Russia. ECFR's research showed the number of challenger parties openly questioning their countries' participation in NATO has declined. They also tend to support greater defence spending at home.

But where much of the European political mainstream is moving haltingly towards closer integration in this area—common procurement, military exercises, and command and control capabilities—challengers generally cleave to a national vision of security and defence. Even where they are now reconciled to NATO membership, many of these parties remain sceptical about their countries' actual involvement in the alliance's operations. Furthermore some parties, like the League, consider it consistent to be an active NATO member while remaining somewhat open to continued cooperation with Russia.

Where these parties favour defence spending increases, they want these to reinforce domestic sovereignty and security rather than European versions of those collective goods. For example, many are opposed to Rearm/Readiness 2030, the European Commission's plan to mobilise up to €800bn of additional financing for European defence. In Poland, for example, PiS significantly strengthened Poland's military while in power, but also voted against ReArm in the European Parliament in March 2025.

FAULTLINES: Amid widespread opposition to new EU defence and security plans, some challengers stand out. The Freedom Party of Austria (FPÖ) is marked by its country's traditional neutrality. The RN exhibits the wider French primacy placed on national independence. Some more left-wing challengers, like the LFI and Syriza, have accused the EU and mainstream governments of prioritising militaristic spending above investments in areas like education and health.

5. The idea of Europe: How, not whether

All challenger parties share, to varying degrees, a Eurosceptic voter base and a fundamental preference for national sovereignty. Most criticise the EU for promoting liberal values and failing to protect Europe's borders. In recent years, however, their public stances on the EU have generally evolved in a more pragmatic direction.

There are several reasons for this. First, the debacle of Brexit seems to have made leaving the union entirely less attractive. Second, harsher global conditions have rallied voters generally towards the idea of European cooperation. Third, challenger parties have honed strategies for

gaining influence in the EU architecture—for example, the European Parliament's proportional representation system provides footholds for representation. A common agenda in defence of a "Europe of Christian nations" from alleged threats unites many of them. The EU mainstream's rightwards march on some topics, like migration, convinces challengers that the bloc is becoming more favourable to them.

Inevitably, however, a largely nationalist group operating in an organisation that is at once supra-national and intra-governmental results in some contradictions. Some parties, like the FPÖ, somewhat approve of EU enlargement to the Western Balkans (particularly Serbia) as expanding the fraternity of proud European nations. But a minority see it as an encroachment on national sovereignties—or a dilution of the existing EU community by poorer, weaker states. Some, especially in southern Europe, embrace the euro and fiscal integration as a mechanism to make their own electorates better-off. But others, especially in richer northern Europe, see these same steps as intolerable assaults on their voters' economic prosperity.

Complicating this further is the second Trump term, which is simultaneously making the case for strong nationalist movements within Europe and for common European fronts against external threats. The challenger consensus encompasses both sides of this calculus—and at points, their contradictions. To challenge, in today's Europe, is also to fudge a few details.

FAULTLINES: Here the exceptions are those challenger parties that cleave to the old hardline Euroscepticism. The most significant example is the AfD, which almost uniquely among challengers continues to flirt with leading its country out of the eurozone and potentially the EU itself.

6. Europe-China relations: Champions of a new detente

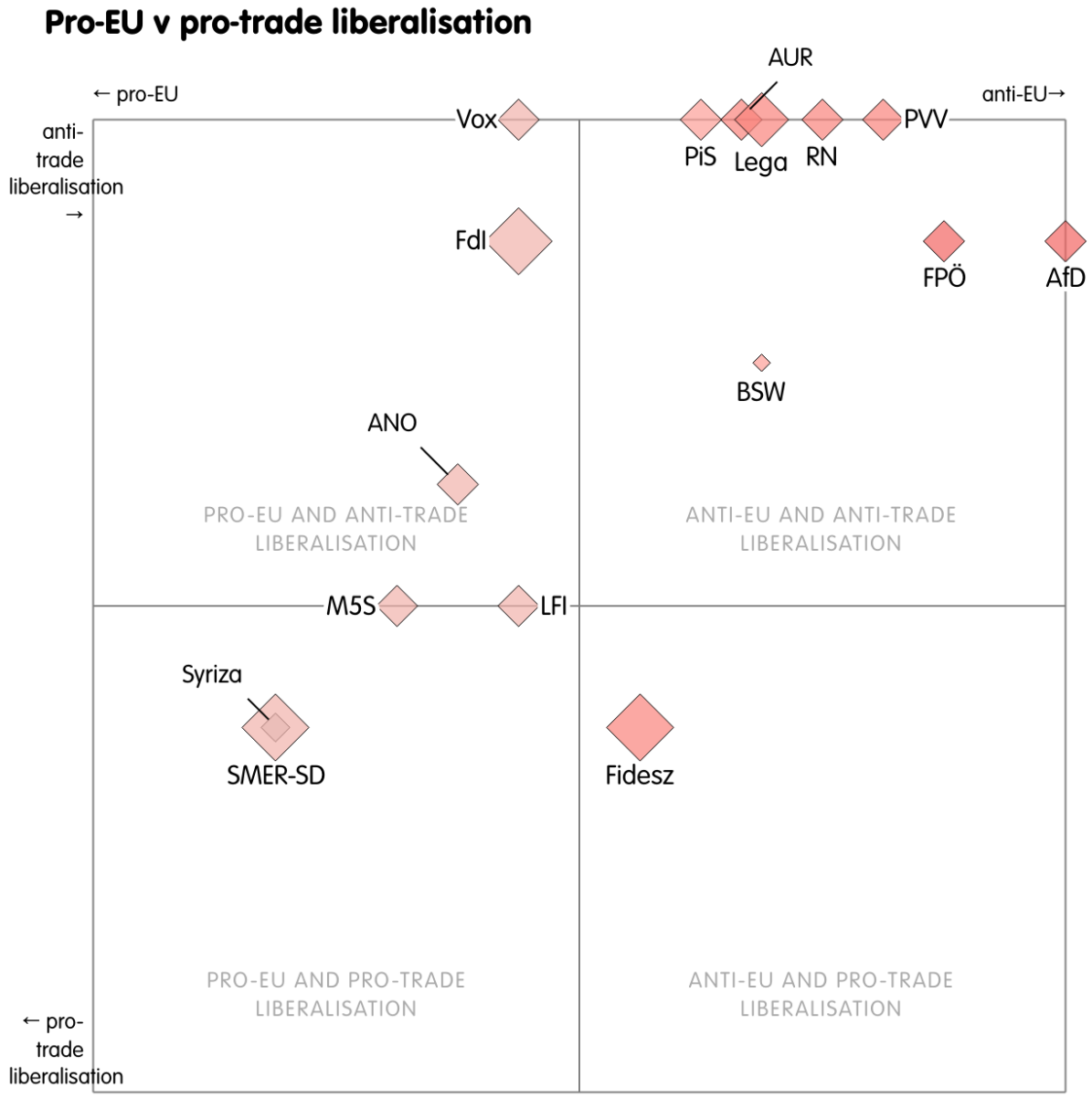
China's characteristics—simultaneously an autocratic people's republic and a Leninist-capitalist fusion, a bastion of economic dynamism and a daunting competitor to Europe's industrial heartlands—seem precision-engineered to confuse challenger parties outside the European political mainstream.

But the broad challenger consensus is that Beijing's contestation of the fading order cherished in Brussels is welcome. For influential challenger parties like the AfD, RN and Fidesz, China's appeal takes several forms. It offers a counterweight to American power. Its investments could help prop up European economies hit by Trump's tariffs. Its political and diplomatic heft could be used to disrupt a Brussels that in recent years has become more hawkish towards Beijing. Overall, these parties are generally more positive about China than the traditional mainstreams in their countries.

Yet the second Trump term could further complicate things. As an anti-establishment US president wages a trade war against China, and an establishment Brussels cautiously moves to soften its position towards the Asian superpower, challenger parties may feel forced to choose between their outsider credentials and their pro-Chinese instincts.

FAULTLINES: Some challengers, like Vox, see China as an ideological foe. Others, like the AfD, struggle to reconcile their commitments both to nationalist sovereignty and to a more confident vision of multipolarity. What will they do if Beijing blockades—let alone seizes—Taiwan in the coming years? Among ECFR's sample, only the AfD and LFI (two parties otherwise on the hard right and left ends of the challenger spectrum) favour Xi Jinping's One China policy against Taiwanese independence. The BSW is the next most Beijing-friendly on this point. But greater confusion could arise if Trump weighs in on Taiwan's side in any such conflict.

7. Trade, economics and climate: Rejecting the old establishment



How powerful is party in its country's political landscape?

1/5: quite marginal on the domestic scene

5/5: leads government

Party's overall score, from closest to liberal orthodoxy to furthest from

Pro-EU positions represent aggregate of parties' scores provided by ECFR local experts on support for EU membership and eurozone. Pro-trade liberalisation positions refer to opposition to trade restrictions and support for recent/upcoming EU free-trade agreements

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The sovereigntist, populist spirit of the challengers emerges most starkly when it comes to what might be called "globalisation topics". These parties tend to be against free-trade agreements, as many are rooted in agricultural and declining industrial areas that view these deals sceptically. And they frequently frame pro-climate policies as expensive establishment assaults on the living standards of ordinary people. The theme uniting challenger trade and climate instincts is an underlying scepticism about forms of multilateral cooperation seen as being at odds with the interests of ordinary people.

Opposition to EU green policies has become a rallying point for many right-wing and far-right parties across Europe. This often combines criticism of climate regulation per se (over its perceived impact on agriculture, industry and energy prices) with broader Euroscepticism and hostility to intrusions on national sovereignty. This approach has amounted to a potent "greenlash", particularly in regions dependent on traditional industries or where public trust in EU institutions is weak (or as is often the case, both).

Scepticism about free trade agreements is distinct, but the dynamic is similar: challenger opposition combines concrete policy objections (over topics like outsourcing, wage competition and regulation) with emotive culture-war tropes about national identity and control. One upcoming litmus test of the challenger relationship with free trade is the ratification of the EU-MERCOSUR agreement. On that, much of the European establishment (especially in member states like Germany) is in favour but populations are split, challenger parties are opposed and some mainstream leaders (such as Macron) are treading a cautious line to avoid strengthening the fringes.

FAULTLINES: While challenger opposition to climate policies and free trade tends to coincide, that is not always the case. Some climate-sceptic parties like Fidesz and Smer-SD—in central European countries that have benefitted from outsourcing—are still relatively open to trade. Along with some other rightest challengers (like Britain's Reform) they favour tariff deals with Trump's US even as they woo voters with protectionist posturing elsewhere. Meanwhile, some leftist parties like LFI, Syriza and M5S that broadly favour climate action—not least as a chance for investments and reindustrialisation that would serve their political bases—are more hostile to trade liberalisation.

8. Israel and Palestine: Past versus present

Not unlike the old mainstream, challenger parties often see the Middle East through the prism of domestic politics—and specifically migration and religion. Many rightist challengers perceive the Israel-Palestine conflict as a civilisational battle between Israel, which they frame as a Western outpost in the Middle East, and Islamist groups like Hamas. A similar logic

explains a smaller subset's now-historical, but still revealing, indulgence of the Assad regime in Syria, which it saw as a protector of eastern Christianity and a useful barrier against Islamist groups.

Israel's war in Gaza has also offered new opportunities to sanitise past (or in some cases present) anti-Semitism by displaying strong support for the Israeli government. A pertinent example is Bardella's invitation, despite belonging to a party whose founder minimised the Holocaust, to Jerusalem in March 2025. There he received what Ariel Muzicant, president of the European Jewish Congress, called a "kosher stamp" from the Israeli government. In the past some challengers—such as the RN and the FPÖ—associated their own hostility to America with a certain openness to Iran and the Palestinian cause. No longer.

Still, the broad, if not universal, challenger consensus on the region is an intensification of the mainstream one: paying lip-service to a two-state solution, generally favourable towards Israel, and mercurial about the region's geopolitics.

FAULTLINES: Inside the challenger bloc, Middle East issues tend to divide the left from the right, with left parties like Syriza and LFI more critical of the Israeli government's actions and illegal Israeli settlements. But on the wider instinct to partner pragmatically across the region, the parties are generally united.

An overview of challenger foreign policy

Issue	Challenger consensus	Notable faultlines
Transatlantic relations	Cautiously admire Trump's disruption; mixed views on NATO	Some challengers (eg, PiS, FdI) are instinctively Atlanticist
Russia/Ukraine	Increasing normalisation with Russia, positive about Trump-led peace deal	PiS and Meloni's FdI remain hawkish on Russia
Migration	Strong restrictions; convergence with mainstream parties	Left parties more permissive (LFI, Syriza); M5S hedges
Security and defence	In favour of national military spending, sceptical of EU-wide defence initiatives	Austria's FPÖ supports neutrality; others differ on NATO depending on history
The idea of Europe	A trend towards "reform from within"	AfD and Fidesz remain more anti-EU or openly subversive
China	Favour hedging and engaging Beijing as a counterweight to the US and EU	Few firmly support Taiwan; AfD and LFI endorse One China policy
Trade and climate	Anti-globalisation, anti-free trade, anti-climate policy when perceived as elite impositions	Left challengers (LFI, Syriza) see climate action as industrial policy
Israel/Palestine	Rightist challengers are broadly pro-Israel; past anti-Semitism whitewashed by strong support for Israel	Left challengers more critical of Israel; pragmatic support for secular regimes in region

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Why challengers differ: Ideology, context and strategy

It is easy to identify areas where challenger parties disagree. As such, the unified front that some attempt at gatherings like in Madrid in February should be taken with a pinch of salt.

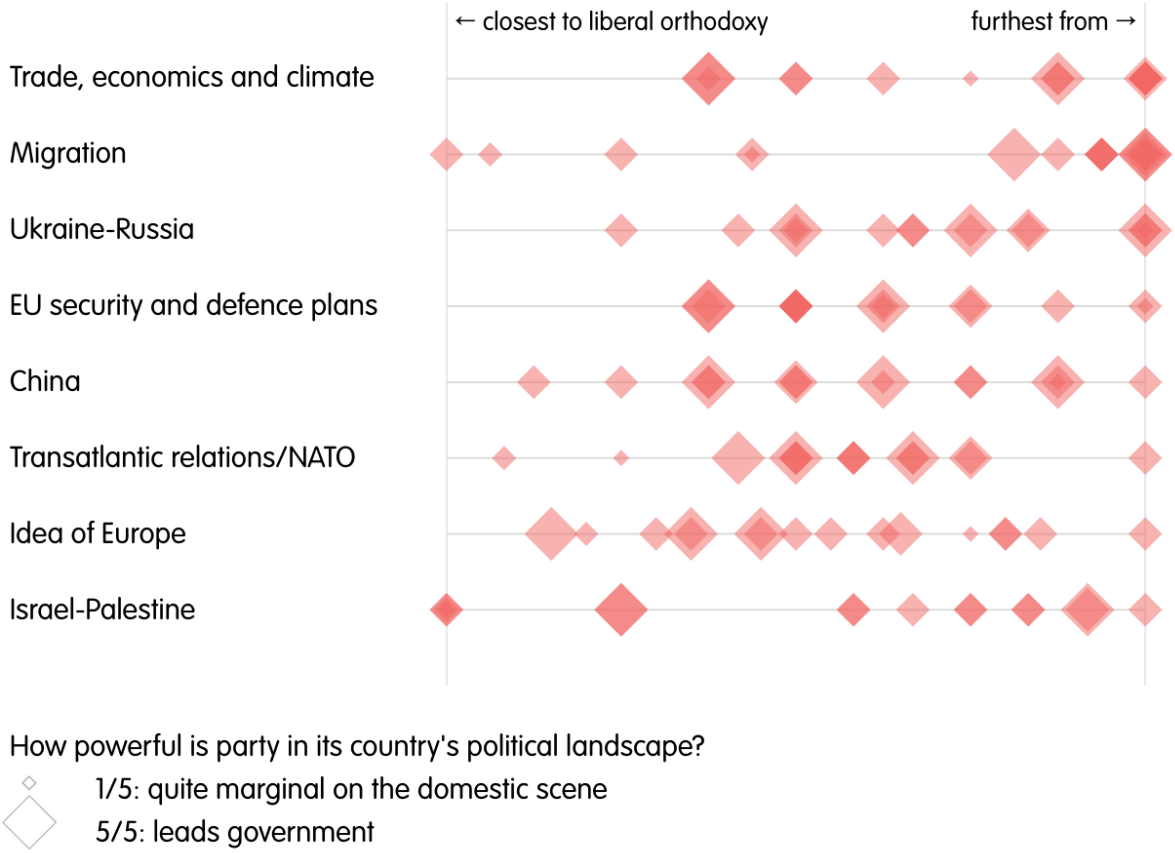
But Europe's mainstream party families, and the European foreign-policy mainstream as a whole, also exaggerate their own unity at points. Behind the common front that, say, the European People's Party (EPP) presents at a party congress are deep philosophical differences between French Gaullists, Polish Christian democrats and Greek conservatives. Between the mainstream leaders that air-kiss and back-slap at the average European Council summit stand huge differences of foreign-policy outlook. Yet it is still possible to discern that certain

foreign-policy instincts unite, say, Polish prime minister Donald Tusk and Spanish prime minister Pedro Sánchez that do not also encompass Hungary's Viktor Orban—or, for all her supposed moderation on matters like Ukraine, Giorgia Meloni.

Moreover, the apparent differences among challenger parties' foreign policies are less a reflection of core ideological divergences than a result of these parties' diverse national contexts and political strategies. In central and eastern Europe it is geography and history—not fundamentally different perspectives on the nature of global order—that explain greater wariness towards Russia. Euroscepticsm is tempered in southern or eastern bloc states that are net recipients of the EU budget; among net contributors in the north, it can be more intense. Other factors from migrant populations and manufacturing surpluses to welfare policies and ageing populations all shape challenger foreign-policy positions in different countries, just as they do mainstream ones.

Another influential force is the general (though not ubiquitous) shift of challenger parties towards "normalisation" and "detoxification" in order to challenge the old establishment at the polls. Where these parties have confidently embraced that path, they have often curbed their foreign-policy distinctiveness as a tool of their strategy: turning away from Russia; restraining their embrace of post-Western order; and in some cases using Atlanticist shibboleths like support for Ukraine or Israel as proxies for political moderation.

Challenger differences, issue-by-issue



Challenger parties must therefore constantly contend with tensions between their core ideological instincts, the foreign-policy context of the polities they inhabit, and their own normalisation strategies. These tensions, as well as the relative foreign-policy inexperience of some of these parties, are leading to a constant adaptation of their positions over time, and sometimes even to open contradictions.

Combined with a gradual blurring of the divide between Europe's establishment and its challengers—witness the former boss of Frontex, the EU's external border agency, running for RN in last year's European Parliament election—this makes it hard to forecast what will come next. What role the challengers will play in European foreign policy over the coming years, assuming they remain a significant and perhaps growing part of the political spectrum, depends on two questions. How will the second Trump administration shape their influence and behaviour? And, in an age of unorder, will challenger parties woo voters more with

foreign-policy ruptures or with assurances of continuity?

Behind the scenes at Dresden 2029

To answer such questions with confidence would be folly. But, as a thought exercise, it is possible to extrapolate from the current political landscape onto an array of conceivable futures. So the following scenarios are a non-exhaustive series of examples, not predictions. They draw on ECFR's challenger party research to speculate about the foreign policies motivating those leaders as they sit around that imaginary G8 table in Dresden in 2029. And they are mostly—though not entirely—mutually exclusive.

Scenario 1: A Trumpian polarisation

Trump's pressure sharpens the challenger-mainstream divide in European foreign policy and reinforces the challengers

President Vance is beaming particularly brightly during this summer summit in Dresden. He knows that Europe's foreign policies have reorganised themselves around Trump's and his own positions. Over the four years from mid-2025 onwards, the US under their leadership has used two main levers of influence.

The first was tariff relief, starting with a deal signed by Orban and Trump by the pool at Mar-a-Lago in August that year, exempting Hungarian goods from the general levy on EU imports. Industrial centres like Debrecen and Gyor boomed as German car-makers rush-relocated their final-assembly operations from other parts of central Europe—the beginnings of which shift helping to usher Andrej Babis, Orban's Czech ally, to power in his country's October election. This dynamic repeated itself at France's presidential vote in 2027. Bardella had positioned himself as the only candidate capable of mollifying Trump, helped by a joint appearance in 2026 at the heavily militarised 250th anniversary celebrations of the American revolution.

The second lever was Trump and his supporters mobilising direct support for Europe's challenger parties. Donors close to the president surged funding into anti-mainstream media in Europe, including a new pan-European network led by the Austrian "identitarian" activist Martin Sellner that used live AI translation to bring politician-presenters like France's Éric Zemmour and Romania's Calin Georgescu to audiences across the continent.

When the EU finally banned Elon Musk's "X" in late 2026, Steve Bannon worked with Sellner to launch Euro-Truth Social, distributing free VPN accounts to prospective users across the

continent with the help of Silicon Valley donors. Behind closed doors in Dresden, Vance and the AfD's Alice Weidel—not invited, but accredited as part of the American delegation—are pressuring Merz to support incoming commission president Giorgia Meloni's bid to lift restrictions on Euro-Truth Social.

Scenario 2: A Trumpian scrambling

Trump's second presidency creates new coalitions, and fractures, in European foreign policy that defy the old logic

It is all smiles before the cameras at the Dresden summit of 2029. But behind the scenes, strange partnerships are coming together. As Vance leaves the venue for his hotel and a briefing on the ongoing Chinese blockade of Taiwan, Bardella, von der Leyen, Meloni and Merz gather to discuss a "European answer" to the crisis. It makes an odd constellation of forces.

But four years of chaotic American foreign policy have left their mark. Some leaders are reminded of Trump's own abortive attempt to blockade Greenland in 2028, a debacle whose domestic political fallout was grave enough to have ended any talk of a third term. The group agree that Europe must stand together, equidistant between the two powers. They resolve not to support any American military response to the Taiwan crisis, and to impose only symbolic sanctions on China—wary of alienating a partner whose importance to Europe has grown over the past four years.

The discussion turns to a new crisis in the Mediterranean. In Egypt, Abdel-Fattah al-Sisi's regime has collapsed under the pressure of refugees from Gaza and Sudan, replaced by an Islamist militia hostile to Israel. Israeli strikes on Egyptian soil have brought both countries to the verge of open conflict, while migrant flows and terrorist threats towards Europe are surging. Vance has told Europeans those are their problem, not America's. So: should Europe sanction or support Israel? Should it engage with the new regime in Egypt?

On this topic the collaborative mood collapses. Merz, Bardella and Dutch PVV prime minister Geert Wilders (attending in an observer capacity) support Israel and refuse to engage with the Islamist militia in Egypt. Farage and Meloni seek to negotiate bilateral refugee-return deals with the new Egyptian regime in exchange for recognition and financial support. But von der Leyen is concerned this would leave other EU states, especially newly joined Albania and Montenegro, exposed to the coming migration surge. Raised voices can be heard from the gallery in the Zwinger palace.

Scenario 3: A civilisational Europe

Sovereigntist challengers, defiant towards the US, become the most influential force

The dominant politician in Dresden is neither Merz nor Vance, but Bardella. France's still-new president is only 33 years old, but he best captures the independentist European mood.

Raised by a single mother in Drancy, a poor outskirt of Paris with a large immigrant population, Bardella knows adversity. He sees the French flag, and the nation it stands for, as the answer to it. The 2027 presidential runoff was a narrow contest with LFI's Mélenchon, both men seeking to distance themselves from any trace of foreign influence—be it from Washington, Brussels or Moscow. Bardella does not believe in a federal Europe, but he does believe in a "Judeo-Christian" European civilisation centred on France and the ideal of independence in a multipolar world. This neo-Gaullist agenda is the order of the day in Dresden.

In an anteroom in the Zwinger, Bardella lambasts Vance and Putin for their alleged impositions on European sovereignty over a mooted US-EU-Russia trade deal. "We will be no-one's vassal, no-one's proxy" he snaps, in a recording later conveniently leaked to France's right-wing CNews media network. Later that day he appears alongside Meloni—and, to some surprise among the press, Ukrainian president Valerii Zaluzhnyi—at a press conference proclaiming "Europe's independence day". A month later, he is Meloni's first guest of honour in the 13th-floor dining room of the Berlaymont in Brussels, the two subsequently proclaiming massive tariffs on non-EU states and a shale gas revolution within the bloc.

Globally, however, Bardella's outburst in Dresden is regarded less as a mere shift of power within the G8 than an illustration of a fracturing group's declining relevance. The following month, September 2029, brings a joint BRICS-African Union summit in Addis Ababa, the Ethiopian capital, which commentators compare to the fall of the Berlin Wall in 1989 and the 2009 G20 summit in London for its turning-point significance. As Europe turns inwards, new global realities are suddenly crystallising.

Scenario 4: An Orbanised Europe

Opportunistic challengers, who comfortably span the spheres of influence of greater powers, dominate Europe's foreign policy

Technically, Orban is only in Dresden as the leader of an observer government. But everyone knows that he is really the presiding spirit of the event. Europe's global deal-broker is the

personification of these mercurial times: pro-American, pro-Russian, pro-Chinese, pro-any-power with cash and diplomatic capital to spare.

Merz really wanted to keep Orban at bay. But even Germany's instinctively Atlanticist chancellor has succumbed to the zeitgeist. He too has recognised that the first Vance presidency will be just as unpredictable and transactional as Trump's second term—and that the Hungarian prime minister knows the rules of that game better than any other. The European election 2029 had made challenger parliamentary groups the first and third largest in the parliament, securing Meloni's presidency in the Berlaymont. She owes Orban, too, for his influential political support. Rumours are swirling about the growing influence of Chinese industrial interests in European politics, not helped by the recent renaming of the local Dynamo Dresden football team as Huawei Dresden.

So the German chancellor grins awkwardly on the sidelines as Meloni, Orban, Putin and Vance hold up a new trade-and-security pact before the cameras. The pact sees America pull its few remaining troops out of Europe, NATO end its missions in its post-1990 accession states, and all powers concerned recognise de jure what is already true de facto: Russia's control of all of southern and eastern Ukraine. With Russian troops massed threateningly on the Estonian border around the city of Narva, Poland's PiS prime minister Mariusz Blaszczak (also attending in an observer capacity) offers the only significant opposition. A subsequent stand-up row between him and Meloni is later cited as the beginning of the end of their parties' ECR group in the new European Parliament.

Scenario 5: A Europeanist coalition

Moderates muddle through to a position of enduring influence

The press headlines are clear: the G8 photo in Dresden represents the high-water mark of Western populism. Bardella only just scraped his presidential runoff against the moderate left-unity candidate, Raphaël Glucksmann, and his popularity is already collapsing as the AI boom accelerates and joblessness rises. Merz owes his power to a fissiparous and quarrelsome AfD he is finding increasingly easy to divide and manipulate. Elsewhere in Europe, new hybrids and coalitions are emerging as part of what is widely dubbed the "Trumplash". As ever, Italy is a preview of wider European trends. Conte's 5SM have returned to power only thanks to the support of the Italian centre-left leader Elly Schlein, in a coalition built on economic populism and taboo-breaking proposals for a skilled immigration boom to address the country's intensifying demographic emergency.

Trump's second presidency did not restore the old European establishment, exactly, so much

as it pushed moderate forces to stiffen their sinews and innovate. His trade war—which Vance is now attempting to reverse to curb soaring US living costs—drove Europeans together and compelled leaders to adopt the recommendations of Mario Draghi's 2024 report to integrate the single market more closely. By withdrawing the American security guarantee, Trump and Vance have pushed Europeans to strengthen and interweave their militaries and adopt more ambitious neighbourhood policies.

Von der Leyen recently completed Europe's transformation into a more autonomous defence player by brokering a grand bargain focusing the EU's new budget on research and development and joint military procurement. A rump Ukraine, Moldova and the Western Balkan states are all on the cusp of joining the bloc. Meanwhile Merz, Meloni and even Bardella are engaging more closely with multilateral institutions abandoned by the US: NATO, the Paris climate agreement, the UN. Slowly and unevenly, a more united Europe is emerging.

Challenger parties are here to stay—that much is clear. But, having become the mainstream, many are now being challenged themselves.

What the rise of the challenger parties means for European foreign policy making

Mainstream parties have tough, nuanced decisions to take

European policymakers across the spectrum should be prepared for continued challenger influence and potentially a shrinking foreign-policy gap between challenger and established parties—even if their relationship with liberal democracy continues to vary significantly. The result will be new configurations and, at points, fraught choices before mainstream politicians forced to decide which outsiders make acceptable foreign-policy partners and which are simply beyond the pale. Those European mainstreamers who seek in-depth understanding of the challengers will likely navigate these changes more successfully than their more incurious counterparts.

Trump's meaning for Europe will be decided in Europe

The impact of Trump on Europe will be decided primarily in Europe rather than in Washington. European policy responses—acts to make Europe more sovereign that command broad support across societies and political landscapes—rather than erratic choices made in the White House will determine the costs imposed and the opportunities unlocked. The most

successful mainstream parties will likely be those that establish credible but genuinely deterrent policy answers to US tariffs, ones that put Trump-friendly challengers on the wrong side of public opinion.

Europe's parties need to forge new consensuses on new imperatives

Debate is needed across the political spectrum about the fundamentals of European power and sovereignty. For example, policymakers need to consider to what extent Europe's geopolitical ideals are linked to its traditional alliances or are derived internally, and whether the continent's close geographic links to demographically younger but less stable regions are more a strength or a weakness. How much, realistically, can Europe expect to cooperate with those regions? And where is the right balance between national sovereignty and collective capability? In the answers to such questions, new groupings—and new dividing lines—will be forged.

Challenger inexperience can be a weakness as well as a strength

The challengers' rise contains the seeds of their own future difficulties. These parties are, for now, unburdened by the military and diplomatic debacles of Europe's recent past. That gives them the freedom to criticise and make grand promises; but with that liberty also comes a certain inexperience, and lack of accumulated knowledge, that could cause them trouble in the future. They are unsentimental about NATO orthodoxies; but many lack alternative anchors for their foreign policies and risk being tossed about on the tides of events. They criticise the establishment freely and sometimes justly; but this exposes them to accusations of hypocrisy that are likely to grow, not decline, with time.

Europe's foreign-policy future will belong to the coalition builders

Domestic circumstances will shape future European foreign policy. Deprivation and division at home may well translate into erratic policies abroad. Mainstream parties that cling to their old voters rather than adapting to new electoral eddies and currents will likely decline and lose influence. Conversely, new majority coalitions within European societies can provide the basis for new resolve and unity in facing the outside world. Europe's place in it will be decided by those politicians and parties—whether challengers, old mainstreams, or novel combinations of the two—that can forge those new coalitions.

Methodology

The authors of this study chose to concentrate on 16 parties from EU member states, based on their European relevance and representativeness of overall challenger trends. For each party, an expert from the ECFR network provided scores in response to 43 foreign-policy questions. These interrogated each party's distance from broadly conventional European policy positions, quantified on a scale from one (or the closest to "liberal orthodoxy") to five (or the furthest from it). The experts were required to provide sources and comments for each score.

Defining those conventional positions was more art than science. On the Israel-Palestine questions, challengers rated five are those most opposed to sanctions on the Israeli government over its conduct in Gaza (true of several of the most prominent right-wing parties in the study, like Fidesz). That much of the mainstream has also dragged its feet on these measures—at least until recently—exemplifies the complexities. It also points to one of the running themes of this paper's analysis: that on some topics, the line between challengers and the mainstream is becoming harder to trace.

In the interests of readability and currentness, these 43 questions were cut down to 24 for the graphics in this paper. The experts also drafted texts on each party. These and the scores formed the basis for both the infographics and the qualitative analyses. All contributors are named in the acknowledgements section below. This analysis took place between November 2024 and February 2025, with a supplementary question on the ReArm Europe initiative added in April 2025.

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