

EUROPEAN UNION AND THE PROTECTION
OF DEMOCRACY: FROM INSTITUTIONAL MECHANISMS
TO DEMOCRATIC RESILIENCE
AND THE EUROPEAN DEMOCRACY SHIELD

OANA PREDA*

Abstract. In the last decade, the European Union has reconfigured its internal mechanisms and instruments for the protection of democracy, in the context of the emergence of the process of democratic regression in some member states, challenges to the rule of law, disinformation and hybrid threats. In shaping an applied discourse on the protection of democracy, we consider it necessary to clarify the key concepts that are used both in the official-institutional framework and in the academic environment when it comes to the protection of democracy. Thus, concepts such as *democratic backsliding*, *rule of law*, *conditionality*, *democratic resilience*, *defense of democracy* and *hybrid threats* will be linked to the legal and institutional framework of the European Union, derived from Articles 2 and 7 TEU (OJC 202/2016) and from Regulation (EU, Euratom) 2020/2092 on the general system of conditionality for the protection of the rule of law and the Union budget. Based on the theoretical framework, we analyze the institutional architecture of democracy protection within the EU, with an extension to the *European Democracy Shield* and related instruments. We argue that these instruments compose a triptych that combines the political, legal-financial and strategic-operational dimensions of democratic protection in the EU, but which still face important limits to consider, in terms of normative legitimacy, effectiveness and political feasibility. The conclusions highlight the implications of this complex process and this transforming architecture for the future of democracy protection in the EU and outline several directions for strengthening democratic resilience at Union level.

Keywords: *European Union; Protection of Democracy; Democratic Resilience; Democratic Backsliding; Rule of Law; Conditionality; European Democracy Shield; Hybrid Threats*

* Teacher Assistant PhD, University of Bucharest, Faculty of Letters, Cultural Studies Department (European Studies), email: oana.preda@litere.unibuc.ro.

Introduction

The European Union is founded on several fundamental values such as democracy, as enshrined in Article 2 of the Treaty on European Union (TEU). “The Union is founded on the values of respect for human dignity, freedom, democracy, equality, the rule of law and respect for human rights, including the rights of persons belonging to minorities. These values are common to the Member States in a society in which pluralism, non-discrimination, tolerance, justice, solidarity and equality between women and men prevail.”¹ However, in recent years, the EU’s ability to protect democracy both within and on its periphery has been questioned. This was due to the emergence of democratic regression (*democratic backsliding*) in some member states, such as Hungary and Poland, combined with external pressures, digital disinformation and the development of information manipulation technologies.²

This situation led to the reassessment of the EU’s institutional mechanisms for the protection of democracy, from the triggering of Article 7 TEU and the use of rule of law conditionality for European funds, to the development of the recent project called *European Democracy Shield*, launched by the European Commission in 2025, an initiative aimed at strengthening the integrity of information, elections and democratic institutions in the EU space.³ In this context, emerges a need for a systematic analysis of the evolution and effectiveness of EU policies and instruments to protect democracy over the last decade.⁴ Drawing on recent institutional developments, we intend to highlight both the progress made and the current limits of the EU in defending the democracy of its own member states.

The main purpose of our analysis is to explain and assess the evolution of EU instruments for the protection of democracy within the European Union, in the period 2010-2026, pursuing the following specific objectives:

– Defining and clarifying the central concept of “protection of democracy in the EU”, in relation to the related notions of quality democracy, rule of law, fundamental EU values and democratic regression (backsliding), using recent academic approaches and contributions from political science and policy studies of European institutions.

– Analysis of the evolution of EU mechanisms for the protection of democracy.

– Identification and assessment of the main internal and external challenges to EU and member state democracies, based on reports and specialised analyses from European institutions, think-tanks and experts in the field.

– Outlining directions for strengthening EU policies in the field of democracy protection, taking into account academic, civil society and European institutions debates.

¹ European Union, *Consolidated versions of the Treaty on European Union and the Treaty on the Functioning of the European Union*, EUR-Lex, OJ C 202, 7.6.2016, art. 2, p. 17.

² International Institute for Democracy and Electoral Assistance – IDEA, *The Global State of Democracy 2021. Building Resilience in a Pandemic Era*, International IDEA: Stockholm, 2021, p. 45.

³ European Commission, *European Democracy Shield and EU Strategy for Civil Society Pave the Way for Stronger and More Resilient Democracies*, press release, 12 November 2025, accessed 20.03.2026.

⁴ European Parliament, *The protection of Article 2 TEU values in the EU*, EPRS Fact Sheets 2026, p. 1.

In furthering our approach, we used a theoretical-institutional approach, combined with a comparative analysis at the level of specific mechanisms. Thus, we combined documentary and discursive analysis, applied to relevant European Union legislation and policy documents, as well as to reports and syntheses produced by official EU institutions, with the comparative analysis of three central instruments: Article 7 TEU, the conditionality mechanism and the European Democracy Shield, from the perspective of the normative framework, the institutional logic, the conditions of activation and application and the practical limits that derive from them, by directly reporting to the specialized academic literature and to the specialized reports of professional organizations (think tanks).

Our study is limited to the reference period 2010-2026, as we considered that this period encompasses major developments in the protection of democracy in the European Union. At the same time, the study is limited to a rather general approach, establishing the context of the topic and framing it through legislative and theoretical landmarks, representing an incipient part of a subsequent, more extensive study, which will also include the development of concrete examples and case studies.

The Protection of Democracy in the European Union – Theoretical Framework

A discussion and applied analysis on the protection of democracy in the European Union requires a prior clarification of several interrelated concepts: *democratic backsliding*, *rule of law*, *conditionality*, *democratic resilience*, *defense of democracy*, *hybrid threats*, concepts that guide and structure both the European institutional discourse and the academic agenda in the field.

In the specialized literature, democratic regression, conceptualised as *democratic backsliding*, designates the process by which an existing democracy “slides backward” by weakening or dismantling the institutions and rules that support the democratic regime, not through spectacular coups d’état, but through successive, often legal, steps by the actors who hold power.⁵ The phenomenon is defined as a “state-led debilitation or elimination of the political institutions sustaining an existing democracy”, including reducing the independence of the judiciary, limiting press freedom, undermining political pluralism and real electoral competition.⁶ Recent studies have documented that democratic backsliding, “which at its core is characterised by the erosion of liberal democratic institutions by elected officials”, occurs when these democratically elected officials – especially those in the executive branch – intentionally weaken or dismantle basic democratic institutions, including the constitution, the rule of law, civil and minority rights, the independence of the judiciary and the media, the separation of powers in the state, and the

⁵ Michael Bernhard, “Democratic Backsliding in Poland and Hungary”, *Slavic Review*, vol. 80, no. 3, 2021, pp. 585-607, Cambridge University Press, doi: 10.1017/slr.2021.145, p. 585.

⁶ Nancy Bermeo, “On Democratic Backsliding”, *Journal of Democracy*, vol. 27, nr. 1, pp. 5-19, 2016, p. 5.

competitive nature of elections.⁷ Contextualizing the democratic backsliding at the European Union level, the notion is regularly linked to cases such as Hungary and Poland, countries where successive constitutional amendments, concentrations of executive power, reduction of the role of control institutions and pressures on independent media have been identified and documented, which raises serious and pertinent questions regarding the EU's capacity to prevent and stop such developments in the member states, not only in candidate countries or countries on the Union's borders.⁸

The rule of law is enshrined as a fundamental value in Article 2 TEU and is presented, both in official documents and in specialist analyses, as the “cornerstone” of the European Union and as an essential condition for the uniform application of EU law and for the functioning of the internal market.⁹ In the interpretations of the European Commission, also reflected in EU parliamentary syntheses, the rule of law includes principles such as legality (as a transparent, democratic and predictable legislative process), legal certainty, the prohibition of executive arbitrariness, the independence and impartiality of the courts, the separation of powers, equality before the law and access to justice.¹⁰

The Consolidated versions of the Treaty on European Union and the Treaty on the Functioning of the European Union crystallizes these elements, outlining the rule of law as a set of principles that guarantee that the exercise of public power is limited by law and subject to judicial control, and its systemic violations may justify measures against member states.¹¹

In EU law and policies, *conditionality* refers to the linking of benefits (especially financial) to the fulfilment of political, economic or legal conditions. In the pre-accession phase of the states, conditionality operated through the “Copenhagen criteria”. After accession, various monitoring and sanction mechanisms address member states, including the rule of law framework outlined by the Commission and the specific procedure provided for in Article 7 TEU.¹² Regulation (EU, Euratom) 2020/2092 introduces a specific rule of law conditionality regime, through which European funds may be suspended, reduced or conditioned if breaches of the rule of law in a member state affect or risk affecting the sound financial management of the Union budget.¹³ From a theoretical perspective, this mechanism

⁷ Anna M. Meyerrose, “Democratic backsliding”, *Eroding Democracy from the Outside In: International Organizations and Democratic Backsliding* (New York, 2026, online ed. Oxford Academic, 4 Nov. 2025), <https://doi.org/10.1093/97801197816479.003.0002>, accessed 22.03.2026.

⁸ Michael Bernhard, *op. cit.*, pp. 606-607.

⁹ European Parliament, *The protection of Article 2 TEU values in the EU*, EPRS Fact Sheets 2026, pp. 4-5.

¹⁰ *Ibidem*.

¹¹ European Union, *Consolidated versions of the Treaty on European Union and the Treaty on the Functioning of the European Union*, EUR-Lex, OJ C 202, 7.6.2016, art. 7, pp. 19-20.

¹² Wouter van Ballegooij, Tatjana Evas, *An EU Mechanism on Democracy, the Rule of Law and Fundamental Rights*, In-Depth Analysis, European Parliament Research Centre: Brussels, 2016, p. 13.

¹³ European Union, *Regulation (EU, Euratom) 2020/2092 of the European Parliament and of the Council of 16 December 2020 on a General Regime of Conditionality for the Protection of the Union Budget*, OJ L 4331, 22.12.2020, art. 4-6, pp. 6-9.

marks the shift from a predominantly political approach (Article 7 TEU) to a more technical and financial one.¹⁴

In this context, the concept of *democratic resilience* is taking shape. It describes the capacity of a democratic system to resist, adapt and transform itself in the face of crises.¹⁵ Thus, democratic resilience “refers to the ability of a political system to withstand and adapt to challenges, threats, and crises without compromising its core principles, institutions, or processes. This concept involves maintaining the integrity of democratic governance, including the protection of civil liberties, the rule of law, free and fair elections, and political pluralism, even in the face of internal or external pressures.”¹⁶

As regards the European Union, *democratic resilience* appears explicitly in the joint communication of the European Commission, the European Parliament, the Council of the European Union, the Economic and Social Committee and the Committee of the Regions on the *European Democracy Shield* and in the launch presentations of the *European Centre for Democratic Resilience*. Both instruments are intended to “strengthen strong and resilient democracies” by strengthening civic space, information integrity and electoral infrastructure.¹⁷ “Protecting democracy and building the democratic resilience of citizens, societies and institutions is an urgent collective endeavour, which requires a whole-of-government and whole-of-society approach.”¹⁸ Independent assessments highlight the link between this agenda and the *European Democracy Action Plan*, an instrument that already provided a strategic framework for promoting free and fair elections, strengthening media freedom and combating disinformation.¹⁹

Discourses about *defending democracy* in the European space are very closely linked to this perspective. The agenda for the defense of democracy aims to protect existing democracies within the EU against external interference and internal erosion, in contrast to the classic *democracy promotion* paradigm, oriented towards the export of democratic norms to the EU’s neighbourhood and to candidate states.²⁰ The *Defence of Democracy Package* announced by the European Commission and implemented in the European legislative process has as its main objective increasing transparency regarding foreign influence on the

¹⁴ Justyna Łacny, “The Rule of Law Conditionality Under Regulation No 2092/2020 – Is it all About the Money?”, in *Hague J Rule Law*. 2021;13(1):79-105. doi: 10.1007/s40803-021-00154-6. Epub 2021 Apr 13, accessed 25.03.2026, p. 81.

¹⁵ International Institute for Democracy and Electoral Assistance – IDEA, *Democratic Resilience by Design and the European Democracy Shield*, International IDEA: Stockholm, 2025, <https://www.idea.int/news/democratic-resilience-design-and-european-democracy-shield>, accessed 20.03.2026.

¹⁶ Nick Cheeseman, Licia Cianetti, Manoel Gehrke, Marie-Eve Desrosiers, *How to Strengthen Democratic Resilience: Five Lessons for Democratic Renewal*, European Partnership for Democracy (EPD): Brussels, December 2024, p. 5.

¹⁷ European Commission, *Joint Communication to The European Parliament, The Council, The European Economic and Social Committee and The Committee of the Regions: European Democracy Shield: Empowering Strong and Resilient Democracies*, 12 November 2025, EUR-Lex 52025JC0791, pp. 1-2.

¹⁸ *Ibidem*, p. 2.

¹⁹ Sofia Calabrese, Lucie Smith, Eva Antoniou, Carolin Johnson, *Reviewing Progress on the European Democracy Action Plan*, European Partnership for Democracy (EPD), Progress Paper, 2023, pp. 4-6; 22-23.

²⁰ Richard Youngs (lead), et al, editors, *European Democracy Support Annual Review 2025*, Carnegie Endowment for International Peace: Bruxelles, 2026, pp. 6-11.

decision-making process and on the civic space, through reporting obligations for entities that represent the interests of third states, but also through measures to prevent opaque financing and coordinated disinformation campaigns.²¹ Viewed from a normative perspective, the *defense of democracy* shifts the center of gravity of the approach, from the export of the European model to third countries, to the internal protection of the EU, due to the challenges brought by new forms of democratic vulnerability (such as digital interference, cyber-attacks or the instrumentation of economic dependencies).²²

Moreover, the concept of *hybrid threats* directly connects the security agenda with that of protecting democracy. *Hybrid threats* refer to coordinated actions, most often below the threshold of armed conflict and difficult to attribute, that combine military and non-military means (such as cyber-attacks, disinformation, economic pressure, political interference) to destabilize states or international organizations. “Hybrid Threats is a broad overarching concept that includes many types of activity: interference, influence, operations, campaigns and warfare/war. All of these activities can be seen as unwelcome interventions of one sort or another to a country’s internal space.”²³ Official EU documents on security issues similarly present these threats, as strategies by which state and non-state actors use disinformation campaigns, election interference, attacks on critical infrastructure, and economic coercion to undermine public trust in democratic institutions and fracture internal cohesion.²⁴

In summary, the reunion of these concepts – *democratic backsliding*, *rule of law*, *conditionality*, *democratic resilience*, *defense of democracy*, *hybrid threats* – outlines a substantial and coherent theoretical framework, as a basis for the analysis of EU policies and actions to protect democracy, a framework that will guide us in the following sections in interpreting subsequent institutional mechanisms.

Institutional Mechanisms for the Protection of Democracy in The European Union

Article 7 TEU – the core mechanism for EU values

Article 7 of the consolidated version of the Treaty on European Union establishes a gradual mechanism, situated on two levels: preventive and sanctioning, with the aim of protecting the fundamental values of the EU described in Article 2 TEU. This procedure allows the Union to react both in situations of “clear risk of serious breach” and in cases of “serious and persistent breach” of

²¹ European Parliament, *Defence of Democracy Package – Legislative Train*, online dossier, accessed 22.03.2026.

²² Richard Youngs, *op. cit.*, p. 6.

²³ Joint Research Centre (JRC) & European Centre of Excellence for Countering Hybrid Threats, *The landscape of hybrid threats – A conceptual model*, G. Giannopoulos (editor), H. Smith, and M. Theocharidou, Publications Office of the European Union, 2021, p. 10.

²⁴ Jean Mafart, “Hybrid Threats: The New Horizons for a ‘Europe of Internal Security’?”, Robert Schuman Foundation, Papers – *European Issues*, no. 787, 2025, p. 2.

its values by a member state, going as far as suspending several rights that accrue to the member states following the application of the Treaties, including the right to vote in the Council of the European Union. “In doing so, the Council shall take into account the possible consequences of such a suspension on the rights and obligations of natural and legal persons.”²⁵

The specialized literature shows that, following the “Haider affair”, Article 7 was expanded to include a preventive mechanism (par. 1), alongside the sanctioning mechanism (par. 2-3), resulting in a three-step mechanism: finding a clear risk, finding a serious and persistent violation and adopting sanctions.²⁶ Basselink also points out that paragraph 1 – “clear risk of serious breach” – was introduced precisely to allow for monitoring and early intervention before a serious and persistent breach occurs.²⁷ Theuns, analyzing the cases of Hungary and Poland, shows that Article 7 has failed to stop the democratic backsliding, due to the combination of the unanimity requirement and the lack of clear steps to determine the escalation between dialogue and sanctions.²⁸ He also argues that, from a normative perspective, maintaining in the Union a member state that systematically violates the values of Article 2 TEU, with suspended rights, would create tensions and would theoretically justify discussing an explicit expulsion mechanism, which would transcend the current framework of Article 7.²⁹

Conditionality mechanism for the protection of the European Union budget (Regulation 2020/2092)

Amid criticism of the effectiveness of Article 7, the European Union adopted, in 2020, *Regulation (EU, Euratom) 2020/2092 on a General Regime of Conditionality for the Protection of the Union Budget*, which explicitly links access to European funds to respect for the rule of law and EU values. The regulation outlines the rule of law by referring to notions such as legality, prohibition of arbitrariness, independence of the courts and separation of powers in the state and allows for the suspension of payments or the reduction of financial commitments when there are breaches of these principles that affect or risk affecting the correct management of the EU budget. Art. 14 “(...) The mechanism provided for in this Regulation complements these instruments by protecting the Union budget against breaches of the principles of the rule of law affecting its sound financial management or the protection of the financial interests of the Union.”³⁰

²⁵ European Union, *Consolidated versions of the Treaty on European Union and the Treaty on the Functioning of the European Union*, EUR-Lex, OJ C 202, 7.6.2016, pp. 19-20.

²⁶ Leonard Besselink, ‘The Bite, the Bark, and the Howl: Article 7 TEU and the Rule of Law Initiatives’, in András Jakab, and Dimitry Kochenov (eds), *The Enforcement of EU Law and Values: Ensuring Member States’ Compliance*, pp. 128-144 (Oxford, 2017; online ed., Oxford Academic), <https://doi.org/10.1093/acprof:oso/9780198746560.003.0009>, accessed 24.03.2026.

²⁷ *Ibidem*.

²⁸ Tom Theuns, “The Need for an EU Expulsion Mechanism: Democratic Backsliding and the Failure of Article 7”, in *Res Publica*, 2022; 28(4):693-713, pp. 693-713, doi: 10.1007/s11158-021-09537-w, pp. 698-701.

²⁹ *Ibidem*, p. 701.

³⁰ European Union, *Regulation (EU, Euratom) 2020/2092 of the European Parliament and of the Council of 16 December 2020 on a General Regime of Conditionality for the Protection of the Union Budget*, OJ L 4331, 22.12.2020, art. 14, p. 3.

Łacny's analysis shows that the conditionality mechanism is legally anchored in the EU's competence to protect its budget, not in the values clause of Article 2 TEU, which allowed the Court of Justice to confirm the validity of the Regulation³¹ in the cases filed by Hungary and Poland.³² Her analysis raises pertinent questions about the practical effectiveness of the instrument, given its dependence on the political will of the Commission to propose measures and the Council to adopt them by qualified majority.³³ At the same time, Mavrouli highlights the tensions between the financial logic of the mechanism and its political ambitions, warning that turning budget protection into a tool for promoting a particular model of liberalism can fuel the perception of a double standard.³⁴ Thus, given the possible controversies, several policy studies, such as those carried out by EDP³⁵ or UNIO³⁶, monitor how the Commission triggered and calibrated the mechanism in relation to Hungary and Poland, highlighting both its potential for constraint and rapid institutional inertia.

European Democracy Shield

The European Union is trying to build a broader “democratic defense” architecture through the *European Democracy Shield* (EDS) initiative, which has developed adjacent to the treaties and mechanisms established by legislation. The Joint Communication of the European Commission, the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, from November 2025, presents the European Democracy Shield as “set of new measures in three priority areas, aimed at empowering strong and resilient democracies by: reinforcing situational awareness and support response capacity to safeguard the integrity of the information space; strengthening democratic institutions, free and fair elections and free and independent media; boosting societal resilience and citizens’ engagement.”³⁷ EDS will be implemented through the *European Centre for Democratic Resilience* (ECDR) designed to “withstand evolving common threats, in particular foreign information manipulation and interference (FIMI) and disinformation”, through a whole-of-society approach.³⁸

The *European Democracy Support Annual Review 2025* analysis notice the fact that “the shield is oriented primarily toward strategic communication and

³¹ Court of Justice of the European Union, judgment of 16 February 2022, *Hungary v. European Parliament and Council of the European Union*, Case C-156/21, ECLI:EU:C:2022:97 and Court of Justice of the European Union, judgment of 16 February 2022, *Poland v. European Parliament and Council of the European Union*, Case C-157/21, ECLI:EU:C:2022:98.

³² Justyna Łacny, *op. cit.*, p. 88.

³³ *Ibidem*, p. 94.

³⁴ Roila Mavrouli, “The Dark Relationship Between the Rule of Law and Liberalism: The Case of the Conditionality Regulation”, *European Papers – European Forum*, vol. 7, no. 1, 2022, p. 282.

³⁵ Sofia Calabrese, Lucie Smith, Eva Antoniou, Carolin Johnson, *Reviewing Progress on the European Democracy Action Plan*, European Partnership for Democracy (EPD), Progress Paper, 2023.

³⁶ Gonçalo Martins de Matos, “On the Triggering of the EU’s Conditionality Mechanism: What Has Been Done and What Could Be Done Better? ”, UNIO – *EU Law Journal* (blog), 02.02.2023, accessed 30.03.2026.

³⁷ European Commission, *Joint Communication to The European Parliament, The Council, The European Economic and Social Committee and The Committee of the Regions: European Democracy Shield: Empowering Strong and Resilient Democracies*, 12 November 2025, EUR-Lex 52025JC0791, p. 2.

³⁸ *Ibidem*, p. 3.

countering disinformation about the EU, rather than standard democracy support as such”³⁹ and suggests that the EDS marks an inward reorientation of EU support for democracy, prioritizing the protection of democratic norms in member states, in the face of an emerging increase in hybrid and information threats. Quaritsch argues, however, that the EDS “papers the cracks” more than it repairs them, as it relies heavily on existing instruments and structures (e.g. EDAP, Rapid Alert System) and leaves largely unresolved questions about the EU’s capacity to address structural causes of democratic regression, such as institution capture and extreme polarization.⁴⁰

Hybrid Threats, Disinformation and Democratic Resilience in The European Union

The European Union presents, under the “Emerging and transnational threats and challenges”, *hybrid threats* as follows: “*State and non-state actors are using hybrid strategies, cyberattacks, disinformation campaigns, direct interference in our elections and political processes, economic coercion and the instrumentalization of irregular migration flows (...). Our competitors are not shying away from using emerging and disruptive technologies to take strategic advantages and to increase the effectiveness of their hybrid campaigns.*”⁴¹

Both academic literature⁴² and policy reports emphasize that hybrid threat actors primarily aim to undermine the integrity and functioning of democracies, erode citizens’ trust in representative institutions, and manipulate decision-making processes by exploiting informational and social vulnerabilities.⁴³

The scientific reports of the Joint Research Centre (JRC), developed together with the European Centre of Excellence for Countering Hybrid Threats, propose a conceptual framework that approaches society as a “resilience ecosystem” composed of interconnected layers, differently affected by hybrid actions.⁴⁴ The Comprehensive Resilience Ecosystem (CORE) model is presented as a method with direct applicability for decision-makers, offering a *systems-thinking* approach for anticipating, assessing the impact and identifying appropriate responses to hybrid threats.⁴⁵ The JRC report on CORE highlights that these threats aim to “constrain the freedom of manoeuvre of democracies in order to discredit its model compared to authoritarian regimes or gain other advantages over

³⁹ Richard Youngs (lead), *op. cit.*, p. 10.

⁴⁰ Luise Quaritsch, *op. cit.*, pp. 6-8.

⁴¹ Council of the European Union, *A Strategic Compass for Security and Defence For a European Union that protects its citizens, values and interests and contributes to international peace and security*, 7371/22, Brussels, 21 March 2022, p. 11.

⁴² Andrzej Jacuch, “Countering Hybrid Threats: Resilience in the EU and NATO’s Strategies”, *The Copernicus Journal of Political Studies*, vol. 12, no. 2, 2020, pp. 5-26.

⁴³ Advisory Council on International Affairs, *Hybrid Threats and Societal Resilience*, Advisory Report 126, The Hague, June 2024, pp. 13-17.

⁴⁴ JRC & ECECHT, *op. cit.*, p. 43.

⁴⁵ Joint Research Centre (JRC), *A Comprehensive Resilience Ecosystem (CORE)*, Science for Policy Report, 2023 (JRC129019), pp. 37-47.

democracies”⁴⁶, which justifies the integration of democratic resilience into the current security strategies of the European Union.

The information dimension of hybrid threats – especially disinformation and foreign information interference – is a central and essential theme of the debate on democratic resilience. Studies such as *Hybrid Threats to Democracy in Europe* show that, in recent years, large-scale disinformation campaigns have targeted the EU and neighboring states, attempting to destabilize and influence democratic processes by exploiting sensitive topics such as electoral integrity, social and cultural values, refugees, the economic crisis, the war in Ukraine, etc.⁴⁷ Comparative analyses of disinformation before the European Parliament elections (e.g. IAI/EPC study on Bulgaria, Germany and Italy) show how false narratives on refugees, support for Ukraine and energy transition can fuel polarisation and directly target the integrity of electoral processes.⁴⁸ Other research on disinformation in the 2024 European elections, based on quantitative analysis of content verified by fact-checking networks, confirms that the themes of migration and electoral integrity are dominant and that disinformation often aims to discredit electoral mechanisms and undermine trust in the elections themselves.⁴⁹

In this context, democratic resilience is understood not only as technical protection against cyberattacks, but as a set of institutional, societal and communication capacities. Both the JRC and think-tank analyses (e.g. Martens Centre) underline that strengthening resilience requires civil preparedness, effective strategic communication, media literacy and close cooperation between authorities, digital platforms and civil society.⁵⁰ Studies comparing the EU and NATO responses to hybrid threats show that both organizations consider “civil preparedness” and the resilience of infrastructures and the information space as basic elements of the countermeasure strategy, and that the EU focuses explicitly on the democratic and rule of law dimension of these threats, centering its responses on cyber threats and on countering disinformation and propaganda.⁵¹

The *European Democracy Action Plan* and, subsequently, the *European Democracy Shield*, integrate these findings into a European policy framework, proposing a combination of measures to increase resilience to disinformation and interference: strengthened cooperation within the *Rapid Alert System*, support for fact-checking networks, stricter rules on the transparency of political advertising

⁴⁶ *Ibidem*, p. 8.

⁴⁷ Martin Solik, Jan Graf, *Hybrid Threats to Democracy in Europe: Russian and Chinese Influence in the EU Neighbourhood*, Brussels: ENoP – European Network of Political Foundations, 2023.

⁴⁸ Federica Marconi, *Disinformation Ahead of the EU Parliamentary Elections: A Snapshot from Bulgaria, Germany, and Italy*, EPC Discussion Paper, European Policy Centre, 13 December 2023: <https://www.iai.it/en/publications/c09/disinformation-ahead-eu-parliamentary-elections>, accessed 31.03.2026.

⁴⁹ Andreu Casero-Ripollés; Carmen López-Rico, Jordi Torregrosa-Carmona, “Spreading False Content in Political Campaigns: Disinformation in the 2024 European Parliament Elections”, *Media and Communication*, vol. 13, 2025, pp. 14-16.

⁵⁰ Sandra Kalniete, Tomass Pildegoviēns, “Strengthening the EU’s Resilience to Hybrid Threats”, SAGE Publications: *European View*, vol. 20, no. 1, 2021, pp. 23-33, <https://doi.org/10.1177/17816858211004648>, accessed 31.03.2026.

⁵¹ Andrzej Jacuch, *op. cit.*, pp. 5-26.

and campaign financing, as well as support for civil society organisations involved in monitoring and civic education.⁵² Specialized studies highlight “the growing will to strengthen resistance to these threats”⁵³, but they also draw attention to the risk that measures will remain fragmented, if they are not integrated into a coherent framework of democratic resilience.

Therefore, the EU agenda on hybrid threats, disinformation and democratic resilience reflects a transition from ad hoc responses to a more systematic effort to build a “resilience ecosystem”, where security instruments, media policies, rule of law rules and support for civil society are designed together.⁵⁴

Conclusions and Implications for the European Union

The analysis of democracy protection mechanisms in the European Union suggests that the current architecture is based on three main pillars: Article 7 TEU (political mechanism of “last resort”), Regulation 2020/2092 on conditionality for the protection of the Union budget (legal-financial instrument) and the European Democracy Shield (strategic-operational framework for democratic resilience and countering hybrid threats). Although these instruments together cover different dimensions, the literature shows that their effectiveness is limited by political constraints, normative ambiguities and institutional fragmentation.

Regarding Article 7 TEU, recent contributions indicate a double problem: the mechanism is difficult to fully activate (due to the unanimity requirements in the European Council) and, in its current form, risks entering a “performative paradox”, since the suspension of the rights of a member state by a decision of the other governments may undermine the very principles of representative democracy that it defends. Reform proposals range from “normalizing” the use of Article 7, by clarifying red lines and procedural steps, to the more radical idea of an explicit expulsion mechanism, which would be more normatively coherent, but which would require treaty amendment. The implications for EU policies are that, in the short term, the focus should be on the combined use of existing instruments (monitoring, structured dialogue, conditionality), and, in the medium term, on a frank debate on the adequacy of the current sanctioning framework in relation to the risks of democratic regression.

The rule of law conditionality mechanism represents the most significant innovation of the last decade, but remains surrounded by controversy over its scope and use. On the one hand, the Court of Justice’s decisions to confirm Regulation 2020/2092 have strengthened its legal legitimacy and reinforced the idea that protecting the budget can also indirectly serve to protect the rule of law. On the other hand, critical analyses draw attention to the fact that this

⁵² European Commission, *European Democracy Action Plan*, EUR-Lex, COM(2020) 790 final, 3 December 2020, accessed 31.03.2026.

⁵³ Sandra Kalniete, Tomass Pildegovijs, “Strengthening the EU’s Resilience to Hybrid Threats”, SAGE Publications: *European View*, vol. 20, nr. 1, 2021, pp. 23-33.

⁵⁴ Joint Research Centre (JRC), *A Comprehensive Resilience Ecosystem (CORE)*, Science for Policy report, 2023 (JRC129019), pp. 37-47.

mechanism is in a “tense relationship” with the debate about liberalism and political pluralism. It also risks being perceived as an instrument of selective pressure, especially if it is not accompanied by transparent, uniformly applied criteria.⁵⁵ From a public policy perspective, this suggests the need for more precise guidelines, clearer communication with citizens in the targeted states, and an explicit articulation between conditionality and the objective of democratic resilience, not just that of budgetary protection.

Regarding the European Democracy Shield, initial assessments are ambivalent: on the one hand, the EDS is seen as a necessary step to integrate dispersed measures (EDAP, combating FIMI, support for the media and civil society) into a unitary framework. On the other hand, there is a fear that this initiative risks covering up certain gaps, without remedying them. This can happen if it is not accompanied by a real political will to address the internal causes of democratic regression.⁵⁶ The European Parliament briefings underline that the EDS can become a central tool against foreign information manipulation and interference, for protecting elections and supporting independent media. But its success depends on the resources allocated and on how it will be coordinated with the civil society strategy and with the legal instruments already in place.⁵⁷ In this sense, the recommendations in the *European Democracy Support Annual Review 2025* indicate that the EU must treat the protection of domestic democracy as a consistent pillar of its policy, not just as an extension of the security agenda.⁵⁸

The intersection of hybrid threats, disinformation and democratic resilience requires closer integration of scientific expertise into policy-making. Models such as the *Comprehensive Resilience Ecosystem (CORE)*, provide a useful framework for systemic thinking about democratic vulnerabilities and designing coordinated responses. But, to be effective, these analytical tools need to be internalized by political institutions and national administrations, not just cited in reports.⁵⁹ In concrete terms, this involves investing in analytical capacities at EU and member state level, creating solid channels of cooperation with civil society and academia, and better democratic anchoring of decisions on countering disinformation and FIMI, to avoid unnecessarily straining freedoms of expression.

Overall, the current architecture of democracy in the European Union is more robust than a decade ago, but remains a “work in progress”. The combination of a difficult-to-use political mechanism (Article 7), a promising but contested legal-financial instrument (Regulation 2020/2092), and an emerging framework for democratic resilience (European Democracy Shield) provides the Union with

⁵⁵ Roila Mavrouli, “The Dark Relationship Between the Rule of Law and Liberalism: The Case of the Conditionality Regulation”, *European Papers – European Forum*, vol. 7, no. 1, 2022, pp. 276-285.

⁵⁶ Luise Quaritsch, *The European Democracy Shield – Papering over the Cracks*, Jacques Delors Centre policy paper, Dec. 2025.

⁵⁷ European Parliament Research Service, *European Democracy Shield*, Briefing, 2025 (EPRS_BRI(2025)775835).

⁵⁸ Richard Youngs (lead), et al, editors, *European Democracy Support Annual Review 2025*, Carnegie Endowment for International Peace: Bruxelles, 2026.

⁵⁹ Joint Research Centre (JRC), *A Comprehensive Resilience Ecosystem (CORE)*, Science for Policy Report, 2023 (JRC129019).

a richer toolbox, but does not guarantee, by itself, the reversal of democratic regression trends. The main implication for EU policies is that the protection of democracy must be treated as a cross-cutting policy, linking the treaties, the budget, security and civic space, and requiring, beyond new instruments, a change in institutional culture – from tacit tolerance of democratic slippages, to a coherent and consistent commitment to European values.

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