

Moldova's EU Path: Between Moscow's Shadow and Brussels' Promises

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INTRODUCTION

In the ongoing confrontation between the European Union and Russia, the Republic of Moldova occupies a critical—though often overlooked—position. While not as militarily pivotal as Ukraine, Moldova's struggle is no less consequential: it is a contest over national orientation and the future of the European order. Moldova's plural identity makes it especially vulnerable to Russian interference, complicating its EU accession process and straining internal cohesion. The country's trajectory mirrors the broader dilemma facing post-Soviet states still defining themselves amid renewed geopolitical rivalry between East and West.

Moldova's future will depend on the decisions of its leaders and electorate, the course of the war in Ukraine, and the EU's readiness to honour its commitment to membership. The 28 September 2025 parliamentary elections will reveal whether Moldova's leadership retains a popular mandate to pursue the European path. This policy brief outlines key aspects of the current situation and sets out how the EU can help safeguard the integrity of Moldova's upcoming elections and support its pro-European trajectory amid heightened geopolitical risk.

MOLDOVA AT A CROSSROADS

Moldova has been deeply affected by Russia's war against Ukraine, facing serious threats to its sovereignty, economy, and energy security. Against this backdrop, the upcoming

parliamentary elections represent a pivotal moment in the country's political trajectory, amid enduring tensions between pro-European and pro-Russian forces.

The vote follows a narrow EU integration referendum in October 2024, which passed with just 50.4% support.¹ The result led to a constitutional amendment enshrining EU membership as a strategic objective.

President Maia Sandu was re-elected at the same time as the referendum, securing 55.3% overall—though at home she actually narrowly lost to former prosecutor general Alexander Stoianoglo. Her victory was largely due to support from the diaspora.²

These outcomes underscore the country's internal polarisation.

Despite its pro-European shift and its deliberate break from Russian gas, Moldova continues to face energy insecurity. Earlier, it had to face the strain of hosting nearly one million Ukrainian refugees, around 100,000 of whom remain. Per capita, Moldova has absorbed more displaced persons from Russia's war than any other European country.³

Ahead of this year's elections, these challenges are compounded by ongoing Russian hybrid interference — including disinformation, covert funding of proxies, and pressure on Moldova's democratic institutions.

Meanwhile, the re-election of Donald Trump has introduced geopolitical uncertainty. Chisinau fears that any US–Russia settlement over Ukraine could sideline

Moldova and embolden Moscow's ambitions to establish maximum control over the country. Budget cuts under Trump have already disrupted USAID funding for independent media, civil society, and infrastructure.⁴

A recent visit to Chisinau by the author revealed a capital transformed by visible investment—but shadowed by economic fragility. Despite modernised storefronts and infrastructure, the country struggles with low growth, inflation, underinvestment, and accelerating youth emigration. A side trip to the breakaway region of Transnistria in eastern Moldova—internationally still recognised as part of the country—underscored the stark political, economic, and cultural contrast with the rest of Moldova.

Whether the country will succeed on its EU path remains an open question.

ELECTORAL DYNAMICS

As of June 2025, Moldova's electoral landscape is shaped by five main political forces. The governing pro-European Party of Action and Solidarity (PAS) of President Maia Sandu leads the polls with 33–40% of decided voters but is unlikely to secure a majority. Its rivals include two pro-Russian contenders—the traditional Party of Socialists (PSRM) and the Victory Bloc, backed by fugitive oligarch Ilan Sor. While both draw from the same electorate, they remain divided.

Two additional forces—the centrist Alternative Bloc led by Chisinau mayor Ion Ceban (a former PSRM member), and the populist Our Party—hover near the 5% threshold and could play kingmaker roles, depending on whether they cross it.⁵

PAS's prospects depend heavily on diaspora turnout and undecided voters, who still make up around one-third of the electorate. Regional divides persist: the capital and central regions remain pro-European strongholds, while northern and southern areas, along with Transnistria, lean toward Russophile or ambiguous parties.⁶

Following its visible interference in the 2024 referendum and presidential election, Russia has shifted to a more covert strategy. It has backed candidates such as Alexander Stoianoglo, whose strong performance in the presidential race revealed deep voter scepticism toward Moldova's Western alignment. Stoianoglo avoids overt Russophilia, instead promoting a "balanced" foreign policy.⁷

In Moldova's parliamentary system, real power lies with the legislature. A majority coalition of centrist or pro-Russian forces could stall or reverse pro-European reforms, even if President Sandu remains in office.

TERRITORY, HISTORY AND IDENTITY

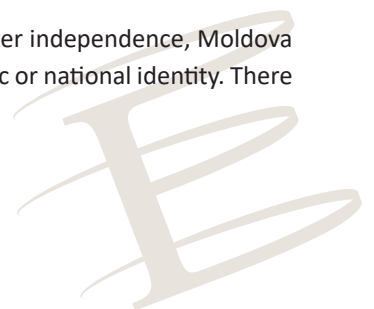
To understand Moldova's polarised present, it is crucial to consider the historical legacies and identity divides that continue to shape its politics.

Situated between Romania and Ukraine, Moldova is landlocked but maintains access to the Black Sea via the Danube. Unlike Ukraine, it does not share a border with Russia.

Historically, the territory changed hands multiple times: from the Principality of Moldavia to the Russian Empire (1812), then to Romania in the interwar period, and finally to the Soviet Union in 1940. Following Soviet annexation, Russification policies and the promotion of a distinct Moldovan identity aimed to weaken cultural and linguistic ties with Romania.

Since gaining independence in 1991, Moldova has oscillated between pro-European and pro-Russian political orientations. After Communist rule (2001–2009), EU integration gained momentum, only to be disrupted by the 2016 election of pro-Russian President Igor Dodon. His successor, Maia Sandu—a pro-European reformer—won the presidency in 2020 and again in 2024. Her PAS holds a parliamentary majority and, under Prime Minister Dorin Recean, continues to pursue EU integration.

More than three decades after independence, Moldova still lacks a widely shared civic or national identity. There



is no unifying national narrative. Divisions over language, symbols, and historical memory persist, undermining societal cohesion and political stability.

Ethnic Moldovans and Romanians constitute roughly 80% of the population in areas controlled by the central government. Moldova is also home to significant minorities, including Ukrainians and Russians—many residing in Transnistria—as well as the Gagauz, a Turkic-speaking but Orthodox Christian group concentrated in the south.

Two competing visions of identity dominate public discourse. One—favoured by Russian speakers and left-leaning parties—promotes “Moldovenism”, a civic identity distinct from Romanian identity, with Russian as a language of interethnic communication. The other—supported by most Romanian-identifying citizens and right-leaning parties—emphasises linguistic and cultural unity with Romania. Although some political forces advocate full unification, their support remains limited. Nonetheless, public backing for unification has grown, reaching around 35% in 2022—driven in part by frustration with domestic governance and economic stagnation.⁸

More than one million Moldovans now hold Romanian passports, primarily as a pragmatic means of accessing EU mobility and employment.⁹

Romania remains Moldova's top ally on its EU path, supporting reforms, energy links, and development as its main advocate and leading investor. The May 2025 election of pro-European centrist Nicușor Dan as Romania's president signals continued political support.

BUILDING EFFECTIVE INSTITUTIONS

Since independence, Moldova has struggled to build stable political institutions.

Frequent government changes, weak party structures, and entrenched corruption have hindered long-term policymaking and eroded public trust. A stark example

was the 2014 “theft of the century” when \$1 billion—about 12% of the country's GDP—disappeared from three banks through fraud involving political and business elites. The scandal sparked mass protests, a financial crisis, and lasting institutional damage.¹⁰

The election of Maia Sandu and her PAS in 2020–21 marked a turning point. The PAS government launched a reform agenda to strengthen the rule of law and align Moldova with EU standards.

Drawing on the EU Association Agreement and the European Neighbourhood Policy, it prioritised reforms in justice, anti-corruption, and public administration—laying the groundwork for Moldova's EU candidate status, granted in June 2022 shortly after its application that March, and the opening of accession talks in 2024.

The EU's decision to grant candidate status—alongside Ukraine—reflected both geopolitical urgency and recognition of Moldova's reform progress. In November 2023, the European Commission recommended opening negotiations citing progress under the nine priority steps outlined in its June 2022 Opinion, despite wartime pressures.

Key advances included the launch of judicial vetting, reforms to anti-corruption and asset recovery systems, and initial steps toward de-oligarchisation. Moldova also adopted new legislation on elections, media, and public administration, enhanced human rights protections, and increased international cooperation.¹¹

Accession negotiations formally began in June 2024 after Moldova met the European Commission's required benchmarks.

In its December 2024 enlargement conclusions, the EU Council acknowledged this progress but emphasised the need for continued reform—particularly in justice, anti-corruption, and de-oligarchisation.¹²



REBOOTING THE ECONOMY

Economic hardship remains a top concern for Moldovans—particularly the high cost of living, low wages, and lack of job opportunities. These issues typically outweigh foreign policy and security concerns in public opinion.¹³

Since independence, Moldova's transition from a planned to a market economy has been slow and uneven. It remains one of Europe's poorest countries.¹⁴

Agriculture still employs a large share of the population, but productivity is hindered by outdated infrastructure, fragmented landholdings, and limited access to finance. Industrial growth has stagnated, while services now account for the largest share of GDP. The ICT sector is a rare bright spot.

Russia's war against Ukraine has further strained Moldova's economy. Disrupted trade, high inflation, and refugee-related spending have weighed heavily on public finances. In 2022, GDP contracted by 6%, and inflation peaked at 30%, sharply increasing living costs.¹⁵ With much of the economy dependent on agriculture and remittances, the shock was severe—though a recovery has begun, supported by international aid.

But Moldova still faces major challenges. Economic diversification, infrastructure investment, and public sector reform are critical for long-term growth and for reducing youth emigration. Observers in Chisinau emphasise the need for the country to clearly identify its competitive advantage.

NEUTRALITY UNDER PRESSURE

President Putin views countries like Moldova, Ukraine, and Georgia as part of Russia's sphere of influence. He perceives their alignment with NATO or the EU as a threat to Russia's security and regional dominance.

Russia's 2023 Foreign Policy Strategy prioritises the "Near Abroad," pledging to ensure "stability," prevent "colour revolutions," and counter "unfriendly" military deployments.¹⁶

Unlike Ukraine and Georgia, Moldova is constitutionally neutral and does not seek NATO membership. However, it aims to join the EU and maintains close ties with Romania—an EU and NATO member.

In May 2024, Moldova became the first country to sign a Security and Defence Partnership Agreement with the EU, establishing cooperation on hybrid threats and defence reform.¹⁷ Its military remains modest, with about 6,000 troops, very few heavy weapons and a 2024 defence budget of €110 million.¹⁸

Moldova's 2023 National Security Strategy—approved by Parliament in December 2023—identifies Russia and its proxies as "the most dangerous and persistent source of threat." It points to Russian aggression in Ukraine, hybrid warfare, and the illegal military presence in Transnistria.¹⁹

THE TRANSNISTRIA THREAT

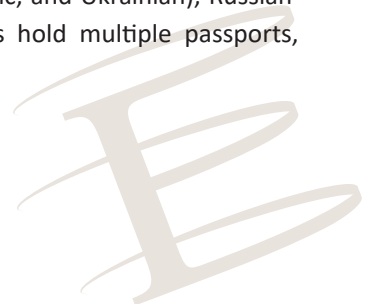
The unresolved conflict in Transnistria remains Moldova's most enduring territorial challenge—undermining its sovereignty, complicating EU integration, and serving as a focal point of Russian leverage.

The region declared independence in 1990 amid tensions over Moldovan sovereignty, triggering a brief but intense war in 1992. Backed by Russia's 14th Army, Transnistrian forces clashed with Moldovan troops.

A ceasefire has held since, but Transnistria remains internationally unrecognised—including by Russia—though it operates as a de facto state with its own institutions.²⁰

Russia maintains around 1500 troops in the region, split between a trilateral peacekeeping mission and a unit guarding a Soviet-era arms depot. Transnistria's population of over 350,000 is ethnically diverse—primarily Russians, Moldovans, and Ukrainians.

Although three languages are officially recognised (Russian, Moldovan in Cyrillic, and Ukrainian), Russian dominates. Many residents hold multiple passports, including the Moldovan.



After Moldova banned Russian troop rotations in 2015—following the annexation of Crimea—and given the absence of an airport, Moscow has increasingly relied on local recruits with Russian passports to staff its military presence.

Moldova views the Russian military presence as a violation of its sovereignty and has repeatedly called for a full withdrawal.

Strategically and symbolically, Russia's presence in Transnistria limits Moldova's autonomy and curbs Western influence. Many Moldovans fear it could be the staging ground for a Russian intervention in Ukraine or Moldova.

In June 2025, Prime Minister Recean warned in a press interview that Moscow wanted to deploy 10,000 troops in Transnistria on Ukraine's borders and aimed to install a pro-Kremlin government in Moldova to do so.²¹

ENDING ENERGY DEPENDENCE

Moldova's 2022 energy crisis—triggered by Russia's slashing of gas supplies and attacks on Ukraine's energy infrastructure—exposed its heavy dependence on Russian energy. Blackouts and price surges forced emergency imports from Romania and underscored the urgent need for diversification. Within one year, Moldova cut ties with Gazprom and sharply increased energy imports from Romania—a shift that doubled domestic prices.

Although Moldova stopped using Russian gas in 2022, government-controlled Moldova remained reliant on electricity from Moldavskaya GRES, a gas-fired power plant located in the breakaway region of Transnistria. Though not under Chisinau's authority, the plant—running on cheap Russian gas—supplied up to 80% of Moldova's electricity. Transnistria sold this electricity to Moldova, and the resulting revenue covered roughly half of the region's budget.²²

On 1 January 2025, Gazprom halted gas deliveries through Ukraine after a transit deal expired and payment disputes persisted, cutting off supplies to Transnistria. This triggered

a new energy crisis affecting both Transnistria and the rest of Moldova. With gas flows suspended, electricity exports from Transnistria ceased, the cross-river energy trade broke down, and the region's revenues plummeted. Transnistria's main power plant switched to coal, leading to severe shortages and a sharp downturn in industrial output. By June, local authorities warned of imminent financial ruin and considered requesting emergency aid from Moscow.²³

As a result, Moldova now has to import electricity from Romania—at significantly higher prices than when it relied on the power plant in Transnistria. EU High Representative Kallas accused Russia of “using energy to blackmail the people of Moldova”.²⁴

In response, the EU and Moldova launched a two-year Strategy for Energy Independence in February 2025, aimed at phasing out Russian energy and integrating Moldova into the EU market. The EU pledged €250 million, including €100 million disbursed by April. An additional €60 million was offered for Transnistria, but its authorities rejected the aid over the EU's tariff conditions.²⁵

The energy shifts have accelerated Moldova's broader push to realign trade and deepen EU integration.

REWIRING OF MOLDOVAN TRADE TIES

The European Union's appeal as a source of prosperity and democratic stability has long resonated in Moldova. Since the EU–Moldova Association Agreement provisionally entered into force in 2014, the country has steadily shifted westward.

A core pillar of the agreement—the Deep and Comprehensive Free Trade Area (DCFTA)—grants Moldova preferential access to the EU market via reduced tariffs, expanded service access, and improved investment conditions.²⁶

By 2024, the EU had become Moldova's largest trading partner, accounting for over half of total trade in goods—while Russia's share dropped to just 2.5%. However,

Russia's war against Ukraine has complicated this shift. The blockade of Ukrainian ports, especially Odesa, disrupted Moldova's trade routes, forcing costly rerouting through Romania and contributing to a sharp decline in foreign investment amid regional instability.

Transnistria's trade dynamics have also shifted. After Ukraine closed its border with the region in 2022, all Transnistrian trade was forced through Moldova, requiring firms to register with Chisinau and comply with national customs rules.

A new Customs Code, adopted in January 2024, redirected customs duties from Transnistrian to Chisinau authorities—prompting protests from separatist leaders, who viewed it as a threat to their autonomy.²⁷

These changes have enabled Chisinau to strengthen economic and administrative ties with the region, gradually fostering integration despite the political deadlock. Transnistria's exports to the EU surged to 83% of its total in 2024—a sharp increase from previous years.²⁸

Still, overall trade remains limited, and the oligarchs behind Sheriff, Transnistria's dominant conglomerate, reportedly resist closer EU alignment, fearing transparency would undermine their opaque business model.

RUSSIAN INFLUENCE AND HYBRID THREATS

In 2024, Russia orchestrated large-scale interference in Moldova's presidential election and EU membership referendum. While international observers, including the OSCE, found the vote well administered, they noted significant foreign meddling. The EU, US, and others condemned Russia's actions.²⁹

In April 2025, Moldova's Prime Minister reported that Russian agents had spent about €200 million to sway the outcome. Fugitive oligarch Ilan Sor was accused of running a \$39 million scheme involving voter bribery, disinformation, and cyberattacks to boost pro-Russian candidates.³⁰

A March 2025 report by the European External Action Service detailed how Russian media and covert platforms spread disinformation framing the EU as a threat to Moldova's sovereignty.³¹

The campaign also targeted President Sandu, recycled propaganda from Ukraine, and included fabricated claims of organ trafficking, AI-generated deepfakes, forged documents, and Telegram-based payment schemes. Despite this interference, the referendum passed, and Sandu was re-elected.

Russia also leverages the Moldovan Orthodox Church—subordinate to the Russian Orthodox Church—to extend its influence. By promoting “traditional values,” the Church amplifies pro-Russian narratives and anti-LGBTQ rhetoric while bypassing media controls.

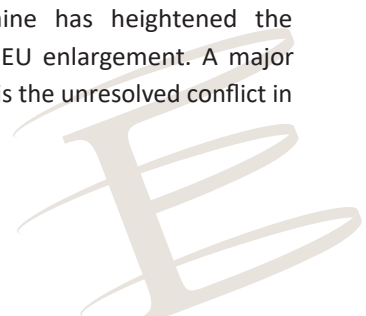
Nearly 90% of Moldova's Orthodox Christians—most of the population—belong to this Church. While some clergy have joined the Romanian-affiliated Metropolis of Bessarabia since 2022, most remain neutral on the war in Ukraine; a minority openly supports Russia.³²

Moscow also exploits the pro-Russian stance of the Gagauzia region, home to about 140,000 people. Granted autonomy in 1994, it has its own legislature and governor and consistently aligns with Russia against Moldova's pro-European leadership.³³

Tensions escalated ahead of the 2025 elections after Gagauzia's pro-Russian governor Evghenia Guțul was arrested on corruption charges linked to Russian financing. The arrest triggered protests and drew condemnation from Moscow. In the 2024 EU referendum, over 94% of Gagauz voters rejected the constitutional amendment supporting EU membership—highlighting Moldova's internal divides.

MOLDOVA'S EU ACCESSION PATH

Russia's war against Ukraine has heightened the geopolitical importance of EU enlargement. A major challenge in Moldova's case is the unresolved conflict in



Transnistria, where the continued presence of Russian troops complicates the application of EU law and raises sensitive questions of territorial control—partly recalling the case of Cyprus.

Moldova must also progress as Europe's poorest country, with limited administrative capacity, persistent corruption, and energy insecurity.

Despite strong political will and public support, these structural challenges require deep reform and targeted EU assistance. The EU is helping through instruments such as TAIEX and Twinning, especially in public administration, legal harmonisation, and parliamentary capacity-building.

Moldova has set an ambitious target of EU accession by 2030. In March 2025, Enlargement Commissioner Kos called this “technically possible,” provided reforms continue in public administration, the judiciary, and anti-corruption, and alignment with EU legislation advances.³⁴

Since the launch of accession negotiations in June 2024, Moldova has undergone comprehensive screening of its legal and institutional framework to identify gaps and prepare for substantive negotiations. These talks are structured around clusters of policy chapters under the EU's revised accession methodology.

Substantive negotiations involve aligning national laws and institutions with EU standards, with each chapter opened—and eventually closed—based on concrete reform progress. Approval at every stage requires unanimous consent from all EU member states.

Importantly, the negotiations are not about whether to adopt the EU *acquis* but how to implement it effectively.

Ukraine and Moldova began screening in parallel and have progressed at a similar pace. By June 2025, both had completed three of six clusters, with the rest expected to finish by year's end.

Commissioner Kos has publicly suggested this parallel track may not continue. Political hurdles—such as

Hungary's threat to block Ukraine—could lead the EU to decouple their paths, allowing Moldova to move ahead independently if reform benchmarks are met.³⁵

In May 2025, Moldova expressed confidence in completing all six clusters by December. At the 9th EU–Moldova Association Council on 4 June, the EU reaffirmed its strong support, citing progress in judicial reform, rule of law, and anti-corruption.³⁶

Moldova's trajectory—underpinned by political will and EU backing—contrasts sharply with Georgia's, where talks are frozen until at least 2028 due to democratic backsliding. In the Western Balkans, accession progress remains slow and fragmented, hindered by internal reform fatigue and political disputes.

EU MOLDOVA PARTNERSHIP

Since Russia's full-scale invasion of Ukraine in 2022, the EU has provided Moldova with unprecedented support across the financial, security, humanitarian, and energy sectors. This partnership reflects both the urgency of the geopolitical context and the EU's confidence in Moldova's reform path.

At the centre of the EU's financial assistance lies the €1.9 billion Reform and Growth Facility, approved in March 2025. It includes €385 million in grants and €1.5 billion in concessional loans. This financial package forms the core of a broader Growth Plan launched in October 2024 to accelerate socio-economic convergence, expand access to the single market, and advance key reforms.³⁷

This support builds on earlier efforts. In December 2024, the EU disbursed the final tranche of its €295 million Macro-Financial Assistance (MFA) programme, launched in 2022 to stabilise Moldova's economy and support structural reform in the wake of the energy crisis.³⁸

Security and defence cooperation has also deepened. A bilateral security and defence partnership, signed in 2024, complements the EU Partnership Mission in Moldova (EUPM), which has been operational since April 2023.

The EUPM helps strengthen Moldova's crisis response capacity, cyber resilience, and defences against hybrid threats.³⁹

In parallel, Moldova has received €197 million in military aid through the European Peace Facility—the second-largest allocation after Ukraine—to modernise its armed forces and bolster critical infrastructure protection.⁴⁰

In April 2023, the EU adopted a targeted sanctions regime at Moldova's request. By 2025, it had imposed asset freezes and travel bans on 16 individuals and 2 entities involved in activities undermining Moldova's sovereignty, democratic institutions, or constitutional order.⁴¹

This response forms part of a broader EU commitment—reaffirmed in October 2024—to reinforce Moldova's democratic resilience.

Significant EU support has also gone toward strengthening Moldova's energy resilience—through emergency supplies, infrastructure investment, and integration with the EU market. As detailed in the chapter on Transnistria and energy security, these measures are critical to further reducing Moldova's dependence on Russian energy and ensuring stability amid ongoing regional disruptions.

To address the humanitarian fallout of the war, the EU allocated €84 million between 2022 and 2025, including through the EU Civil Protection Mechanism. Member states also provided in-kind aid—such as shelter materials, hygiene kits, and power generators—for displaced populations, particularly Ukrainian refugees.⁴²

Together, these strands underscore the EU's enduring commitment to Moldova's European future.

RECOMMENDATIONS FOR EU ACTION

To safeguard Moldova's democratic trajectory and ensure the integrity of the 2025 elections, the EU should pursue the following priority actions:

- Reinforce the EU Partnership Mission (EUPM) by—at least temporarily—further increasing staffing beyond its current 40 international and 15 local personnel scaling up support for crisis management, cybersecurity, and counter-disinformation, and expanding its presence along the Transnistrian boundary in line with the mission's mandate.
- Expand sanctions and enhance financial oversight by targeting additional individuals and entities involved in hybrid operations, strengthening Moldova's financial intelligence capacity, and tracking opaque money flows used to undermine democracy.
- Maximise strategic communication by intensifying the EEAS East StratCom Task Force's activities in Moldova ahead of the elections and urging digital platforms to counter manipulation and increase transparency.
- Strengthen administrative and security resilience by providing additional EU advisory support, training, and non-lethal equipment in priority areas identified by Moldova—enhancing institutional integrity and preparedness for hybrid threats.
- Deepen energy resilience and integration by broadening EU support for grid upgrades, renewable energy, energy efficiency, and legal alignment through the Energy Community—building on the 2025–2026 strategy.
- Accelerate socio-economic support through the Moldova Growth Plan, with a focus on youth employment, rural development, and civil society—helping to counter emigration and social fragmentation.
- Engage constructively in divided regions by delivering inclusive economic and governance support in Gagauzia and Transnistria, fostering functional integration while respecting Moldova's constitutional framework.



OUTLOOK

Moldova is entering a pivotal phase in its post-Soviet trajectory. While EU accession negotiations are underway and support from Brussels is at an all-time high, the country's future direction remains uncertain.

Crucially, Moldova's integration prospects depend not only on strong leadership, domestic reform, and sustained public support, but also on the outcome of Russia's war against Ukraine. The parliamentary elections in September 2025 will be a key test of Moldova's democratic resilience and its continued alignment with the European path in an extraordinarily challenging context.

The months ahead will also test the EU's ability to uphold its commitments amid intensifying geopolitical pressure. By recognizing Moldova and Ukraine as candidate countries and launching accession negotiations with both, the EU has tied its credibility to their long-term success. A Russian victory—or even a frozen conflict on Moscow's terms—would significantly undermine that prospect, weakening Moldova's position and jeopardizing the viability of EU enlargement.

At this juncture, sustained and coherent engagement is essential—not only to support Moldova and Ukraine, but also to demonstrate that the EU's promise of membership remains both real and credible. The first EU–Moldova summit in Chisinau on 4 July 2025 provides a high-profile opportunity to do so.

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