

Policy guide · Nodes of contention

Consensus on the goals. Contention on the details.

16 political nodes of contention that will shape delivery of the One Europe One Market roadmap, and where the real disagreements lie.

Based on *The political conditions for delivering the One Europe One Market roadmap*, October 2026

EVERYONE AGREES ON WHERE EUROPE IS HEADING

- ✓ Deeper market integration
- ✓ Greater investment
- ✓ Lower energy costs
- ✓ Stronger connectivity
- ✓ Greater resilience
- ✓ Industrial & tech capacity

"This apparent consensus often dissolves as soon as discussions move to specifics behind closed doors."

The paper names the disagreements public debate tends to skip, so workable compromises can be built.

THE ROADMAP AT A GLANCE

5

strategic pillars

42

legislative & policy
priorities

16

nodes of contention

Signed **24 April 2026** by Parliament, Council and Commission, committed to agreeing the principal measures **by end-2027**, with quarterly stocktaking.

Node of contention: where broad agreement on a goal breaks down into competing positions on a specific file.

16 NODES ACROSS 5 PILLARS

Positions and country tags as reported in the paper; not exhaustive.

1 Savings and Investments Union

Deeper capital markets: agreed. **The institutional and regulatory conditions to get there:** not.

1.1 Who should supervise Europe's financial markets?

Market Integration & Supervision Package

Stronger EU supervision via ESMA

(FR) (IT) (ES) (DE*)

vs

Keep supervision national

(IE) (LU) (MT)

→ Increasingly, larger Member States vs smaller financial centres. *Germany has recently moved closer.

1.2 Do post-crisis rules now over-constrain lending?

EU banking framework amendments

No dilution

Safeguards are a condition of competitiveness

vs

Targeted recalibration

More proportionality, not deregulation

1.3 Banking Union: cut legacy risks first, or share risk in parallel?

European Deposit Insurance Scheme (EDIS)

Reduce risk first

(DE)

vs

Reduce and share together

(IT)

→ Not static: the E6 initiative led by France and Germany shows new coalitions can emerge.

2 Energy Union & clean transition

Lower costs and decarbonisation: agreed. **Who pays, and how fast:** highly contested.

2.1 Who pays for cross-border grids?

European Grids Package · Energy Highways

High-price importers

Access to cheaper electricity (IT)

vs

Lower-price exporters

Face higher prices and grid costs (FR)

2.2 How strong should the carbon price signal be?

EU ETS post-2030 review

Keep it strong

(DK) (SE) (FI) (LU) (MT)

vs

Protect industry

(DE) (IT) (PL) (CZ) (SK)

→ ETS revenues since 2013: €200bn+. Under 10% went to industrial decarbonisation.

2.3 How fast should the transition go, and who funds it?

2040 climate target · EU financing instruments

Hold the course

90% cut by 2040, no carbon lock-in

vs

Add flexibility

Longer timelines, transitional assets such as gas

3 Connectivity Union | One European network: **whose spectrum, whose timetable, whose suppliers?**

3.1 Who should govern spectrum?

Digital Networks Act

EU harmonisation

Scale and speed for 5G/6G

vs

National control

Better placed for rural coverage

3.2 Copper switch-off: legal deadline or market pace?

Digital Networks Act

Binding deadline

Proposed: 2035, or 2039 where fibre lags

vs

Market-paced

Follow real fibre take-up, rural safeguards

3.3 High-risk suppliers: phase out or case by case?

Cybersecurity Act 2.0

Binding EU phase-out

One weak link exposes the whole system

vs

Risk-based approach

Avoid writing off working assets

→ Positions follow domestic operators' business models and views on China.

4 A strategic Single Market

Asked to do more than remove barriers: **scale, security and tech leadership. How much more?**

4.1 How far should Europe prefer its own?

Industrial Accelerator Act · Procurement reform

"Made in EU"

FR

vs

Stay open

Nordics

→ In between: Germany's "Made with EU", a targeted preference with trusted partners.

4.2 Should merger control weigh scale and global rivals?

Revision of the EU Merger Guidelines

Competition first

States fearing takeovers

vs

Think global

States home to large groups

4.3 EU Inc.: who is it for, and what about workers' rights?

EU Inc. / 28th regime

Simplicity and speed

Start-ups, VC investors

vs

No erosion of workers' rights

Trade unions

→ No stable camps. The wider the scope, the harder it is to justify flexibility.

4.4 Should research be steered or left free?

European Research Area Act · FP10

Steer toward strategy

AI, chips, biotech, clean & dual-use

vs

Excellence-based, open

Breakthroughs cannot be planned

5 Social & territorial cohesion

One market, for all? **Beyond labour mobility, the Roadmap barely addresses the social and territorial dimension.**

5.1 How much weight for the social agenda?

Quality Jobs Roadmap · Quality Jobs Act

Equal priority

Social democrats, trade unions

vs

Separate and lighter

Market-oriented forces, employers

5.2 Labour mobility: facilitate or protect?

Fair Labour Mobility Package

Modernise and facilitate

Business, net-sending states

vs

Enforce and protect

ETUC, net-receiving states

5.3 Cohesion policy: for growth or compensation?

Post-2027 MFF (2028–34)

Pro-growth, all territories

Cohesion states, regions & cities

vs

Compensate the weakest

Net contributors

→ No cohesion deliverable in the Roadmap: the fight moves to the 2028–34 EU budget.

FIVE TENSIONS RUN THROUGH EVERY PILLAR

European

vs

national authority

Resilience

vs

investment capacity

Who gains

vs

who pays

Openness

vs

strategic autonomy

Competitiveness

vs

social & territorial protection

They follow no single political geography: fiscal stance, manufacturing vs services, views on China and Russia, and organised interests all cut across them.

Compromise is built across files, not within them.

Cross-file bargaining is the Roadmap's main political strength. It is lost if each initiative is negotiated in isolation.

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Read the full paper · Roadshow in a dozen European cities from October 2026

