

The Burning and the Breaking

Europe staggers through a weekend of record heat, wildfire evacuations and a thousand silent deaths in Spain, while France's government hangs by a thread.

From a defiant Budapest Pride to German missiles and a Polish power play, the continent's fractures deepen under the weight of an unrelenting summer.

Compiled from German, French, Italian, Spanish, Dutch, and English sources.

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A Continent Overheated in Body and Spirit Fights to Hold Its Centre

Europe is not well. It is a Saturday of extremes — of heat that kills silently in Spanish apartments, of flames that chase thousands from their beds in southern France, and of a political fever that will not break.

The numbers are brutal and impersonal: 54 French départements on red alert, more than 1,300 excess deaths since late June, at least 1,028 heat-related fatalities in Spain alone, nearly 3,000 evacuated from the Pyrénées-Orientales. But the feeling, read across the front pages of a dozen nations this morning, is of a continent whose body and polity are overheating at the same moment, each making the other harder to bear.

France's prime minister pushed his budget through without a vote and faces a no-confidence motion after post-match violence left two dead and hundreds arrested. A Spanish court jailed a former Socialist minister for 24 years over mask-contract corruption amid a deadly heatwave, while Germany's AfD re-elected its leadership with 28% in the polls and the chancellor announced a plan to buy and station American Tomahawk missiles on German soil.

There is no single feeling, only layers: heat-exhaustion, anger at political fragility, pride in the Budapest marchers, and deep unease about what autumn will bring.

ON THE REGION'S MOOD - JULY 2026

Yet the day's most telling image may come from Hungary, where tens of thousands filled the streets for Budapest Pride — the first since Viktor Orbán was voted out — exhaling years of pent-up defiance under a new centre-right government whose stance on civil liberties remains unwritten. It was a reminder that even as the mercury rises and governments wobble, the continent's deeper argument about who belongs and who decides is far from settled.

A newly elected conservative Polish president backed by Donald Trump is testing the limits of a largely ceremonial office to force an early election, as Russian strikes killed 14 civilians in Ukraine and a family in Ireland mourns after a shopping-centre shooting.

The Day At A Glance

A record-smashing heatwave tightened its grip on Western Europe as France faced political and literal flames, Spain marked a grim milestone, and Germany's conservative surge and missile pact deepened the weekend's sense of instability.

France - Heat and Hostility

Fifty-four départements are on red alert with temperatures above 40°C and nearly 3,000 evacuated from wildfires near Perpignan, while Prime Minister Lecornu faces a no-confidence vote after forcing the budget through parliament without consent.

Spain - A Thousand Silences

The Carlos III Health Institute confirmed at least 1,028 heat-related deaths during the current wave, even as the Supreme Court sentenced former minister José Luis Ábalos to 24 years for pandemic mask-contract corruption.

Germany - Missiles and Marchers

Chancellor Merz announced a deal to buy and station US Tomahawk cruise missiles in Germany, hours before the national-conservative AfD re-elected its co-leaders at a congress surrounded by large street protests.

Hungary - Exhaling at Pride

Tens of thousands marched in the first Budapest Pride since Viktor Orbán was voted out, testing the new centre-right government's commitment to civil liberties in a visibly emotional public moment.

Ukraine - Strikes and Stalemate

Russian missile assaults on five cities killed at least 14 civilians while a separate strike with a new intermediate-range 'Orechnik' missile left four dead and more than 80 wounded, even as a prisoner swap was agreed.

Poland - The President's Gambit

Newly elected conservative President Karol Nawrocki, backed by Donald Trump, signalled he may push for an early parliamentary election or obstruct the government's agenda, injecting fresh uncertainty.

Ireland - Sunday Evening Shock

A lone gunman killed one man and injured a child at Fairgreen Shopping Centre in County Carlow, shaking a community unaccustomed to such violence and prompting Gardaí to urge against sharing footage online.

Italy - Etna Stirs

Mount Etna is spewing large ash plumes over Sicily, with authorities monitoring air traffic and local health impacts as footage of the dark smoke clouds circulates widely.

Belgium - A Walk Outside

A Brussels court granted Mohamed Bakkali, the logistician for the 2015 Paris attacks, six 36-hour prison leaves as a preliminary step toward possible conditional release, reigniting debate on justice and security.

Backdrop - The Weight of the Summer

Western Europe is living through its warmest June on record, with more than 1,300 excess deaths since the 21st, while right-wing and national-conservative parties reshape debates on migration and defence across the continent.

The Numbers At A Glance - Europe - Saturday, July 25, 2026

FR Départements on red heat alert 54 Météo France places nearly two-thirds of the country on orange or red alert as temperatures exceed 40°C.	ES Heat-related deaths in Spain 1,028 Carlos III Health Institute toll during the current heatwave, the highest in Europe.	EU Excess heat deaths since June 21 1,300+ World Health Organisation tally across Europe since the start of the record-warm period.	FR Evacuated in southern France ~3,000 People forced from homes near Sainte-Marie-la-Mer and Canet-en-Roussillon as wildfires spread.
DE AfD national polling 28% The national-conservative party re-elects its co-leaders as it holds first place in national surveys.	UA Civilians killed in five-city strikes 14 Russian missile assaults across Ukraine also left many trapped under rubble, with a separate strike killing four.	ES Ábalos prison sentence 24 yrs Former Socialist minister jailed for corruption over COVID-19 mask contracts during the pandemic.	HU Budapest Pride marchers Tens of thousands First LGBTQ+ march since Orbán's defeat, testing the new centre-right government's stance.

How The Countries Are Doing

A brutal heatwave tests Europe's strength, killing over 1,300 and forcing thousands from their homes while political storms rage in Paris and Berlin. Our simple colour-coded guide to the mood in ten major economies this weekend.

Country	Politics	Budget	Money	Markets	Outside	What's Driving It
France CAC 40 - euro	5	4	3	3	3	Prime Minister Lecornu forced the budget through parliament without a vote, inviting a no-confidence motion as wildfires raged in the south.
Germany DAX - euro	4	3	3	2	5	The national-conservative AfD re-elected its leaders at a congress swamped by protests while the chancellor announced a US missile deal.
Spain IBEX 35 - euro	3	3	3	3	3	Over a thousand heat-related deaths and a former minister's 24-year prison sentence for mask corruption paint a sombre picture.
Italy FTSE MIB - euro	2	2	3	2	2	Mount Etna is spewing ash but disruption is minimal and the political scene is relatively calm this week.
Netherlands AEX - euro	2	2	2	2	2	A quiet week politically and economically, with the Dutch watching continental heat and security debates from a slight distance.
Belgium BEL 20 - euro	3	2	2	2	3	A court decision granting prison leaves to a Paris attacks logistician has stirred public and political unease.
Ireland ISEQ - euro	2	2	2	2	2	A rare shopping-centre shooting has shaken the country but the economic and political fundamentals remain solid.
Portugal PSI 20 - euro	2	2	3	2	3	A new search for Madeleine McCann brings an old tragedy back into the news while the heatwave lingers.
Poland WIG20 - zloty	4	3	3	3	5	A newly elected conservative president backed by Trump could push for an early election, injecting deep uncertainty into Polish politics.
Hungary BUX - forint	3	3	2	2	3	Tens of thousands march in the first post-Orbán Budapest Pride, testing the new centre-right government's stance on civil liberties.

How to read the colours: 1 = calm, 2 = fairly good, 3 = mixed, 4 = some strain, 5 = serious strain. Updated Saturday, July 25, 2026.

BURNING AND BREAKING

Europe Is Exhausted, Overheated and on Edge

A record-shattering heatwave has killed over a thousand in Spain and forced thousands from their homes in France, just as political crises engulf Paris and Berlin. This is a continent that feels physically scorched and politically brittle, bracing for a long, uncertain summer.

Part 1 - The Heat That Kills and Burns

In southern France, 54 départements are on red alert and nearly 3,000 people have been evacuated ahead of wildfires near Sainte-Marie-la-Mer and Canet-en-Roussillon. The heat is not just a health crisis but a lived, daily ordeal: parents keeping children indoors, elderly citizens afraid to leave their apartments, and emergency services stretched thin from the Mediterranean to the North Sea.

"The country is literally burning in places while the government is politically burning."

ON FRANCE - JULY 2026

Part 2 - Governments Under Fire, Literally and Politically

The political temperature is just as high in Germany, where the national-conservative AfD re-elected co-leaders Alice Weidel and Tino Chrupalla at a party congress surrounded by large street protests. The party now polls first nationally at around 28 percent, a figure that reshapes everything from migration debates to the chancellor's new Tomahawk missile deal with the United States.

Part 3 - A Sudden Unfreezing in the East

In Poland the mood is far more anxious: newly elected conservative president Karol Nawrocki, backed by Donald Trump, could push for an early parliamentary election or obstruct the government's agenda. His campaign was marred by allegations of Russian interference, and the sense of a democracy caught between external pressure and internal division is palpable.

POSSIBILITY	CHANCE	MARKETS	BREADTH	WHAT IT MEANS FOR LATIN AMERICA
A - Heatwave eases, politics stabilise	35 percent	Calm	Broad	Commodity demand steady; EU climate-finance pledges for Amazon remain on track ahead of COP17 in Yerevan.
B - Political crises deepen, French government falls	30 percent	Euro dips, CAC 40 volatile	Europe-wide jitters	Weaker euro helps Latin American exports to Europe but raises financing costs for dollar-denominated debt.
C - Security fears spike after NATO warning and missile deal	20 percent	Defence stocks rally, broader markets cautious	Eastern Europe tense	Latin American governments reassess China-Russia-US balancing acts; defence-supply opportunities emerge.

POSSIBILITY	CHANCE	MARKETS	BREADTH	WHAT IT MEANS FOR LATIN AMERICA
D - Heatwave persists, mortality and economic damage mount	15 percent	Insurers and utilities under pressure	Southern Europe worst hit	EU focus on climate adaptation accelerates, increasing pressure for Amazon-related biodiversity finance.

Source: Rio Times Europe, drawing on Le Monde, El País, Der Spiegel, Telex, Gazeta Wyborcza, and 19 other regional outlets, July 25, 2026.

Eight Things We Are Watching

Europe enters the weekend under a blanket of record heat that has already claimed over a thousand lives in Spain alone. Political fault lines are widening too, from a no-confidence vote in Paris to a defiant AfD congress in Germany and the first post-Orbán Pride in Budapest.

What	How We See It	Over What Period	Why
France's political meltdown amid the heatwave	▼ CAREFUL	6 months	Prime Minister Lecornu forced the budget through without a vote, triggering a no-confidence motion. Combined with wildfires and PSG-related violence, the pressure on the executive is acute.
Spain's twin tragedy: heat deaths and corruption verdict	◆ NEGATIVE	6 months	Over 1,000 heat-related deaths coincide with a 24-year prison sentence for a former Socialist minister. The moral weight on the public conversation is heavy.
AfD consolidates as Germany's strongest party	◆ MIXED	6 months	Weidel and Chrupalla were re-elected as the national-conservative party polls at 28 percent. The Tomahawk missile deal with the US shows Berlin hedging against both internal and external threats.
Post-Orbán Hungary tested by Pride march	▲ POSITIVE	6 months	Tens of thousands marched in Budapest's first Pride since Orbán's defeat. The new government's response will signal whether civil liberties genuinely open.
Poland's new president and the early-election risk	▼ CAREFUL	6 months	Karol Nawrocki, backed by Trump, could obstruct the government or force early elections. Russian interference allegations during his campaign add to the unease.
Ukraine ceasefire talks fail again	▼ CAREFUL	6 months	A second round in Turkey collapsed despite a prisoner-swap commitment. Moscow's declaration that the US is no longer an objective mediator narrows the diplomatic path.
Russian escalation and the NATO 2029 warning	◆ NEGATIVE	6 months	Germany's top military officer warned NATO must prepare for a Russian attack by 2029. The same day, 14 Ukrainian civilians died in Russian strikes across five cities.
Belgium's Paris-attacks logistician gets prison leaves	◆ MIXED	6 months	Mohamed Bakkali was granted six 36-hour leaves, a step towards conditional release. The decision tests public tolerance for judicial rehabilitation in terrorism cases.

Six People Shaping The News

From a prime minister fighting for his job to a newly elected conservative president in Warsaw, these six figures are driving Europe's most consequential stories.

Sebastien Lecornu

Prime Minister of France

He forced the 2026 budget through parliament without a vote, a constitutional move that exposes him to an immediate no-confidence motion. His survival now depends on whether opposition parties can unite against him.

Alice Weidel

Co-leader of Alternative für Deutschland (AfD), Germany

Re-elected at a party congress ringed by large street protests, she now leads a national-conservative party polling first nationally at 28 percent. Her challenge is to hold together a movement that is both surging and deeply polarising.

Karol Nawrocki

President of Poland

The newly elected conservative president, openly backed by Donald Trump, could use his ceremonial office to force an early parliamentary election. His campaign was marred by credible allegations of Russian interference.

José Luis Ábalos

Former Socialist minister, Spain

The Supreme Court sentenced him to 24 years in prison over COVID-19 mask contract corruption. The severity of the sentence lands at a moment when Spain is already mourning over a thousand heat-related deaths.

Friedrich Merz

Chancellor of Germany

He announced a landmark deal with the United States to buy and station Tomahawk cruise missiles on German soil. The move signals a sharp turn in Berlin's defence posture even as domestic divisions grow.

Mohamed Bakkali

Convicted terrorist logistician, Belgium

A Brussels court granted him six 36-hour prison leaves, a preliminary step towards possible conditional release. The decision has reignited a difficult public debate about justice and security a decade after the Paris attacks.

The Day, Country By Country

The dominant feeling across the continent this Saturday is one of being overwhelmed: by heat, by political chaos, by grief, and in a few places by cautious hope.

FRANCE

A country that feels both literally and politically ablaze

The heatwave placed 54 départements on red alert, with nearly two-thirds of the country under orange warnings as temperatures passed 40 degrees. Nearly 3,000 people were evacuated from wildfires near the Mediterranean coast. Sources: Le Monde – July 25.

Lecornu bets his government on the budget

The prime minister used special constitutional powers to force part of the 2026 budget through without a parliamentary vote, triggering a no-confidence motion. The move deepens chronic parliamentary instability just as the 2027 presidential race begins to take shape. Sources: Le Figaro – July 24.

SPAIN

A nation mourning a thousand heat-deaths

At least 1,028 people have died of heat-related causes during the current heatwave, a toll that has shifted the national conversation from policy to grief. The scale of loss has prompted urgent questions about public health preparedness. Sources: El País – July 25.

A former minister falls, and trust frays further

Former Socialist minister José Luis Ábalos was sentenced to 24 years in prison for corruption tied to COVID-19 mask contracts. The verdict lands heavily on a public already worn thin by scandal and suffering. Sources: El País – July 25.

GERMANY

A party congress under siege, a country split

The national-conservative AfD re-elected its co-leaders at a congress surrounded by large street protests. Polling at 28 percent nationally, the party has become the most potent expression of Germany's deepening internal divisions. Sources: Der Spiegel – July 25.

Tomahawks in the Rhineland

Chancellor Merz announced a deal with Washington to buy and station American-made Tomahawk cruise missiles in Germany. The move comes as the country's top military officer warns NATO must prepare for a possible Russian attack by 2029. Sources: Süddeutsche Zeitung – July 24; Frankfurter Allgemeine Zeitung – July 24.

HUNGARY

Exhaling after Orbán, but watching closely

Tens of thousands marched in Budapest for the first Pride since Viktor Orbán was voted out, filling the streets with a cautious sense of liberation. The new centre-right government's response is being read as a test of its real commitment to civil liberties. Sources: Telex – July 25.

POLAND

An election that may not wait

Newly elected conservative President Karol Nawrocki, backed by Donald Trump, could push for an early parliamentary election or systematically obstruct the government's agenda. The uncertainty is compounded by persistent allegations of Russian interference during his campaign. Sources: Gazeta Wyborcza – July 25.

UKRAINE

Fourteen dead, and still fighting back

Russian strikes across five cities killed at least 14 civilians, with many more trapped under rubble. Hours later, news broke that a second round of ceasefire talks in Turkey had failed, though both sides committed to a prisoner swap. Sources: Kyiv Independent – July 25; Hürriyet – July 25.

Pipeline, Sectors, And The Calendar

ITEM	TYPE	WHEN	STATUS
French no-confidence vote	Political risk	Days away	Imminent
NATO ministerial meeting	Defence planning	July 28-29	Scheduled
Madeleine McCann search, Portugal	Investigation	This week	Active
19th EU Russia sanctions package	Legislation	Early September	In preparation
EU Fair Labour Mobility Package	Social policy	Autumn 2026	Upcoming
COP17 Biodiversity, Yerevan	Diplomacy	October 19-30	Scheduled
EU Quality Jobs Act adoption	Legislation	December 2026	Planned
EU Anti-Poverty Strategy rollout	Social policy	December 2026	Entering implementation
French 2027 presidential race	Political cycle	Ongoing into 2027	Active positioning
Mount Etna ash monitoring	Natural hazard	Ongoing	Under observation

Sector Watch - Four Things to Track

DEFENCE

Germany's Tomahawk missile deal with the US and the military warning of a Russian attack on NATO by 2029 mark a rapid escalation in alliance posture. European defence contractors and supply chains are entering a sustained period of demand.

CLIMATE ADAPTATION AND PUBLIC HEALTH

Over 1,300 excess deaths across Europe since June 21 expose critical gaps in heatwave preparedness. Expect renewed scrutiny on urban cooling infrastructure, health-system capacity, and insurance liabilities in the Mediterranean basin.

POLITICAL RISK AND GOVERNANCE

France's no-confidence vote and Poland's early-election risk inject fresh uncertainty into two of Europe's largest economies. Investors should watch for delays to reform agendas and potential rating-agency reactions if instability persists.

SOCIAL COHESION AND CIVIL RIGHTS

Budapest Pride tests Hungary's new government, while the AfD's consolidation in Germany sharpens the debate on migration and EU integration. These social dynamics carry long-term implications for labour mobility and regional stability.

Calendar - Next 30 Days

DATE	EVENT	WHY IT MATTERS
July 25	Budapest Pride march (first post-Orbán)	Tests new Hungarian government's LGBTQ+ rights stance
July 25	New Madeleine McCann search begins, Portugal	German police follow fresh investigative leads
July 28-29	NATO ministerial meeting	German warning on Russian attack by 2029 will dominate planning discussions
Early September	19th EU sanctions package against Russia	Von der Leyen signalled new round targeting additional sectors and individuals
Autumn 2026	EU Fair Labour Mobility Package unveiling	Aims to ease cross-border work and address social security portability
October 19-30	COP17 UN Convention on Biological Diversity, Yerevan	EU institutions and EESC active participants; Amazon climate finance on the agenda
December 2026	EU Quality Jobs Act planned adoption	Part of EU social pillar strengthening worker protections
December 2026	EU Anti-Poverty Strategy rollout	Enters implementation phase with funding and policy levers
Ongoing into 2027	French 2027 presidential election positioning	Lecornu's instability and far-right strength reshape pre-election landscape
Ongoing	Mount Etna air-traffic and health monitoring	Ash plumes could disrupt Mediterranean aviation routes

What Today Tells Us

Europe ends this Saturday carrying multiple burdens at once: a climate that is literally killing people, political systems under visible strain from Paris to Warsaw, and a war on its eastern edge that refuses to pause. The heatwave alone has claimed more than 1,300 lives across the continent in five weeks, and that number will rise.

Yet tens of thousands marched freely in Budapest for the first Pride after Orbán, and failed ceasefire talks in Turkey still yielded a prisoner-swap commitment.

Sources & Method

FRANCE	Le Monde, Le Figaro, BFM TV, Libération – July 24-25 (French).
SPAIN	El País, El Mundo – July 25 (Spanish).
GERMANY	Der Spiegel, Süddeutsche Zeitung, Frankfurter Allgemeine Zeitung – July 24-25 (German).
ITALY	La Repubblica – July 25 (Italian).
POLAND	Gazeta Wyborcza – July 25 (Polish).
HUNGARY	Telex – July 25 (Hungarian).
UKRAINE / TURKEY	Kyiv Independent (English), Hürriyet (Turkish) – July 25.
BELGIUM / IRELAND / PORTUGAL	De Standaard (Dutch), The Irish Times (English), Público (Portuguese) – July 24-25.

Method. We sweep the region's main outlets in their languages, rank by impact, and skip what we covered before.

Compiled from major Europe outlets in the region's main languages.

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