

N O V E

2019 EU ELECTIONS

State of Play
5 MARCH 2019

OVERVIEW

NOVE has produced this second update as part of ongoing monitoring of the progress towards EU elections in May this year. Our [previous update](#), focusing on political group dynamics, remains largely relevant, and should be read in parallel with this note. We again include an overview of the most recent polling numbers, updated for February, and focus the deeper dive this time on how the four largest national delegations in the European Parliament will change for 2019-2024. Of course, not everything happens in the “big 4”. In a future update, we will look to how power shifts outside the main poles of influence – and especially Poland – may change the EU agenda in the years to come.

WHAT THE POLLS SAY

Projected seats of EP political groups

	<i>EPP</i>	<i>S&D</i>	<i>ALDE</i>	<i>ECR</i>	<i>Green s/EFA</i>	<i>GUE/ NGL</i>	<i>EFDD</i>	<i>ENF</i>	<i>Other s</i>
Current EP (%)	218 (29%)	187 (25%)	68 (9%)	74 (10%)	52 (7%)	52 (7%)	43 (5.7%)	34 (4.5%)	23 (3%)
Poll of Polls (28 Feb)	176	129	101	62	42	50	35	63	47
Europe elects (Feb)	172	130	100	63	48	55	50	63	24
European Parliament (28 Feb)	181	135	75	46	49	47	39	59	66
<u>% of seats after the elections 705 in total</u>	24.4 – 25.7%	18.3 – 19.1%	10.6- 14.3%	6.5- 8.9%	6.0- 7.0%	6.7- 7.8%	5.0- 7.1%	8.4- 8.9%	3.4- 9.4%

The colour code in the final column shows which parties are set to improve their relative position in the EP compared to 2014-19 (green) and which are set to lose seats (red), with those where little change is predicted remaining in navy. Before drawing any conclusions from the numbers above, **a couple of points on methodology:**

- All sources use a mixture of polling data – where possible, EU-specific data is used, but where that is not available, the data is extracted from national-level data. Thus, the polls potentially underrepresent the **frequent discrepancy in voter behaviour** between national and EU-level elections (for example, voters tend to vote more “radically” in EU elections).

- All polling sources work on the **presumption that current political groups will continue to exist** in the next Parliament. This fails to represent groups that may cease to exist (e.g. EFDD) or amalgamate (as will happen to some extent with ECR, ENF, EFDD)
- The **European Parliament numbers add a layer of nuance** insofar as electoral thresholds are taken into account. Thus they are more robust, particularly for smaller parties. However, they are also stricter in assigning political parties to European groups, only doing so when affiliation has been made official. This explains the very high figures for “others”, which includes non-aligned (NI) MEPs but also unaffiliated parties (for example, France’s La République en Marche, which has not officially joined the ALDE party). However, bearing in mind how recent these figures are (26 February), and the level of nuance, **we use the Parliament’s projection in the individual analyses below.**

Compared to last month’s figures, the fortunes of most groups look similar. Support for the EPP and S&D continues to decline (the pace of decline increasing slightly for the former, and evening out for the latter) and there has been a minor upward swing (i.e. fewer than 5 seats) for the ENF and Greens. Projections for the EFDD differ wildly, though exhibit a slight downward trend. The **biggest shifts have happened for ALDE – which has seen an increase of around 7 seats since January’s polls**, while GUE/NGL has become unpredictable, with polls oscillating between a loss of seats and retention of the status quo.

All in all, the top line story is still that of **the clash of two rising forces** – a strengthening of anti-establishment populist and (far) right parties, with current ENF parties set to double their representation in the Parliament, and an upsurge in votes for the liberal centre. However, how these changes translate into political influence will differ significantly: while the centrists will have a prominent role to play in at EU-level coalition/consensus-building, the rise of the right will be held back by internal fragmentation and their status as ideological *bêtes noires* in the eyes of the political mainstream.

NEWS FROM SELECTED MEMBER STATES

Why have we focused this note on the member state level?

- The **influence of national government composition on decision-making in the Council.** While the 2014 transition took place under a European Council and Parliament dominated by the EPP and S&D (20 out of 28 members being from these parties for the Council, and an easy majority for the coalition in the Parliament), the 2019 transition will be very different, with ALDE’s “kingmaker” role – whereby the larger parties need to secure support from the Liberals - even stronger than before. In fact, ALDE may even have more Council seats than the Socialists this time around. All of this has a major role to play in the distribution of Commissioner portfolios, beyond that of the President, as well as other “top jobs” (e.g. the Presidents of the European Council and the European Central Bank). –
- The **role of national delegations in the formation of the Parliament.** First, they represent a “bridge” between national politics and the EP - while decisions in the EP are based on the positions of political groups, decisions *within* the groups themselves often have a national “flavour”. Secondly, the Head of each national delegation sits in the wider Bureau of each political group, and ahead of politically important and controversial decisions, national delegations represent an important first stage in aligning policy.

GERMANY – A STRONGHOLD FOR (ALMOST) EVERYONE

	EPP	S&D	ALDE	ECR	Greens /EFA	GUE/ NGL	EFDD	ENF	Others	Total
Current EP	34	27	4	6	13	8	1	1	2	96
Projection	34	18	7	-	20	7	10	-	-	96

In the context of the big four countries under analysis, the shift in Germany will be notable if less dramatic than elsewhere. However, the numbers above do deserve some closer study. First of all, in what is a familiar story across the three biggest member states, **the socialists are facing an uphill battle**, and may lose up to half

of their seats. However, they may end up being the strongest national delegation within their group at EU level. It is **all but certain that the Germans will be the largest delegation for the Greens and the EPP** – indeed the CDU/CSU will together have the single largest delegation in the EP. However, the Green wave may be a hollow victory unless the group manages to be involved in the political chess game between the EPP, S&D, and ALDE for the top positions in the institutions. For the EPP, they may well be looking at gaining the Parliament Presidency, particularly as a consolation prize if Manfred Weber is not named Commission President. In the centre, **Germany's Free Democratic Party (FDP) could be a strong pro-free market voice in ALDE**, and remains in favour of Macron, despite differing views on the future of the EU, and some worries about Macron's concessions to the *gilets jaunes*. However, the polls have varied significantly in terms of the outlook for the FDP in the past month, predicting anything between 7 and 12 seats. On the far right, **the Alternative for Germany (AfD) has been placed in EFDD above, but will more than likely shift to what is left of the ENF**, a similar grouping involving other hard Eurosceptics, or even be cherry-picked by other groups on an individual basis.

FRANCE – THE COLLAPSE OF THE TRADITIONAL PARTIES

	<i>EPP</i>	<i>S&D</i>	<i>ALDE</i>	<i>ECR</i>	<i>Greens /EFA</i>	<i>GUE/ NGL</i>	<i>EFDD</i>	<i>ENF</i>	<i>Others</i>	<i>Total</i>
Current EP	20	12	7	-	6	5	6	15	3	74
Projection	11	5	2	-	8	7	5	19	22	79

A first glance at the figures above might indicate the catastrophic demise of moderate politics in France, but this would neglect the growth in the centre. As mentioned, this **seat projection does not include Macron's party under ALDE**, with all of its 18 seats ending instead in the "Others" column. It is certainly of note, though, that the liberals may not be the biggest beneficiaries of the shift in voter behaviour – rather, as in Italy, **the single biggest delegation from France may come from the far right**, with the Rassemblement National (RN), as the Front national is now known, potentially claiming 20 or more of the now 79 seats available. Moreover, the RN may find itself in the leadership role for the further reaches of the right in the new EP – potentially allying with Germany's AfD in a rump ENF group, and being the more powerful of the two arithmetically. It will face competition from the Eurosceptic "Debout la France" though, members of EFDD in the current EP. The poll above assumes the *gilets jaunes* will not pass the electoral threshold, but it is still possible that momentum could build behind this movement, **which may divert votes away from the (far) left and right**. If so, it is very uncertain where such MEPs would fall in the EP, though an alliance with Italy's 5Star would seem the most natural fit. There has also been talk of the *gilets jaunes* joining up with Debout la France. What of the left? **The Parti Socialiste** – fragmented by the formation of Génération.s by former Presidential candidate Benoit Hamon – **may face complete obliteration through not reaching the electoral threshold**. Therefore, an alliance on the left seems the only way to ensure representation.

ITALY – AN OVERALL LOSS OF INFLUENCE

	<i>EPP</i>	<i>S&D</i>	<i>ALDE</i>	<i>ECR</i>	<i>Greens /EFA</i>	<i>GUE/ NGL</i>	<i>EFDD</i>	<i>ENF</i>	<i>Others</i>	<i>Total</i>
Current EP	13	31	-	4	1	3	14	6	1	73
Projection	9	14	-	4	-	-	21	28	-	76

Italy seems likely to face the most pronounced decline in influence on the basis of the upcoming elections – even if, ironically, it will also compete with France as biggest harbinger of change. The problem is where Italy's strength will lie – **while (as per our last note) the Lega seems set to take a leading role in an expanded ECR, this group may find it more difficult to exert influence** if it includes more radical political

elements. Similarly, **the 5-Star Movement will be a loud but ineffective presence in the EP**, as it tries to cobble together a political group that will likely lack political coherence. The coalition between these two at national level also makes cooperation at EU level rather difficult, with each wanting to maintain its political identity – but it would be unwise to rule out the idea of a coalition (along the lines of the Greens/EFA group) with both parties taking a leading role in each faction. Moreover, let's not forget that Italians currently hold the positions of EP President (the EPP's Antonio Tajani) and the Presidency of the European Central Bank (Mario Draghi, also EPP-affiliated), both of which will change in 2019. It seems highly unlikely that it will retain either of these. **With its EPP delegation severely reduced, effective influence on policy-making by Italians in the next EP looks set to rest solely with its socialist delegation**, which still has a chance of remaining the largest within the group, despite losing over half of its seats.

SPAIN – STABILITY... FOR NOW

	<i>EPP</i>	<i>S&D</i>	<i>ALDE</i>	<i>ECR</i>	<i>Greens /EFA</i>	<i>GUE/ NGL</i>	<i>EFDD</i>	<i>ENF</i>	<i>Others</i>	<i>Total</i>
Current EP	17	14	8	-	5	10	-	-	-	54
Projection	13	18	11	-	2	8	-	-	7	59

Compared to the other three countries analysed, **Spain may appear to be a bastion of stability for the traditional parties**. An important note at the outset though: national elections will be held on 28 April, and the result in that case will almost certainly impact on voter behaviour. For example, if the resulting government includes the far-right VOX party, it may be legitimised in the eyes of many voters, and may help their cause. Similarly, a bad performance by the incumbent socialist government might see EP voters turn away from the party. At the moment in any case, polls predict a **decline in seats for the EPP which is in fact more notable than it at first appears**, as it must be seen in the context of the 5 extra seats that Spain gains compared to 2014. This also means that **what looks like growth for the S&D is in reality maintenance of the status quo**, at least at national level – the best news any European socialists can hope for in the 2019 elections, it seems. The polls tell us that **the major beneficiaries of the new seats will be ALDE and VOX, the newly strengthened far right party** which recently entered regional government in Andalusia. It is not clear, however, whether VOX will join an EU-level group – their presence in an expanded ECR faces many objections, so their MEPs may end up joining groups individually rather than as a bloc. **The bigger story for Spain is the strengthening of the national delegations for S&D, EPP, and ALDE at European level** – with Spain competing with Germany, Italy, and Romania for the largest S&D delegation and possibly being the second-largest for both EPP and ALDE, it is possible they will hold the chairs of multiple groups in the EP, and almost certain they will hold at least one. All in all, **Spanish influence in the EP should be on the rise**.

ON THE HORIZON

The following are milestones to bear in mind at the national level, as they will have an effect on the power dynamics within the Council in particular:

- **14 April:** Finnish parliamentary elections (ALDE may lose a Council seat here, probably to the PES, but with EPP still in with a chance)
- **28 April:** Spanish parliamentary elections (as stated above, EP results may be affected significantly by what takes place at the national level, and was the incumbent government to lose, there would be no socialist representation in the Council from the most powerful member states)
- **12 May:** Lithuanian Presidential election (Commissioner Vytenis Andriuskaitis is running)
- **26 May:** Belgian Federal elections (another likely loss of a Council seat for ALDE)
- **By 17 June,** Denmark will hold a general election – here, ALDE is likely to lose to PES, but the party of current Commissioner Margrethe Vestager is likely to do well. This could help the latter's chances at a nomination for Commission President as a liberal compromise.
- **20-21 June:** European Council meeting – first possible date for EU Member States to name the Commission President. Unlike previous mandates, this is unlikely to happen this quickly due to the political complexity at hand.