THE BATTLE FOR EUROPE’S FUTURE: POLITICAL CLEAVAGES AND THE BALANCE OF POWER AHEAD OF THE EUROPEAN PARLIAMENT ELECTIONS

Executive summary

This paper investigates the practical implications of the political dividing lines (cleavages) and expected outcomes ahead of the European Parliament elections of 23-26 May 2019. These dynamics will determine the political balance and direction of the new European Parliament and European Commission for the next five years.

For this purpose, we first provide novel projections of the composition of the future European Parliament, both with and without the UK, as the UK’s participation remains unclear at this stage in view of the uncertainty surrounding Brexit. We then compare these projections to the current composition of the European Parliament, showing that the future Parliament will likely be more fragmented, less pro-European, and contain a larger number of anti-establishment right-wing Members of the European Parliament.

The composition of the future European Parliament is however only partially informative of the balance of power that will underpin European politics in the next legislative term. Future coalitions and majorities needed to appoint the European Commission and vote legislation will in fact depend on the dominant ideological cleavages. We hence analyse the evolution of cleavages in the European Union from a historical and political science perspective and outline their potential political consequences. Notably, changes in the political landscape could lead majorities to be based on cleavages related to societal values on selected topics. The latter may end-up reviving the left-right divide on policy choices related to salient issues such as immigration, compared to differences of views on European integration which are expected to underpin majorities on EU constitutional issues such as the coalition necessary to appoint the next European Commission.

1. The views of the authors are their own and do not necessarily reflect those of the institutions with which they are affiliated. We would like to thank Livio Stracca, Boris Kisselevsky, Johannes Lindner, Wojtek Golecki, Hanni Schälermann, Carina Stubenrauch, Stephanie Bergbauer and Alessandro Giovannini for helpful comments and input.
We describe how these cleavages are likely to impact the future of the EU and of European politics. Empirical evidence has in fact shown that ideologies are not mere labels, but rather have relevant implications for the voting choices of political groups and their members, and therefore for European legislation. In particular, we describe how during the crisis European legislators gradually shifted from forming coalitions based on the left-right cleavage to coalitions based on a pro-/anti-EU conflict.

These reconfigurations will not only affect the voting behaviour of Members of the European Parliament, but will also likely impact the functioning of the EU as a whole. The political fragmentation that will emerge from the next EU elections will make more difficult the formation of strong and stable majorities at European level. As a result, intergovernmentalism could be strengthened to the detriment of the Community method, the appointment of the Commission might be delayed, and the increased political and arithmetic difficulty of forming majorities could lead to less ambitious legislative proposals and European Parliament positions.
INTRODUCTION

As the European Union is heading into the European Parliament elections of 23-26 May\(^2\), there is a sense of high uncertainty as to the new political balance that will follow. This political balance will be key to the political direction of the EU’s executive (Commission) and its ability to pass legislation (with the European Parliament and EU Council acting as co-legislators).

This uncertainty is to some extent related to the elections themselves and the circumstances in which they are being held. The composition of the new Parliament will evolve as a result of Brexit, if and when it materialises. Furthermore, the new European Parliament will be more fragmented according to current polls, while affiliations to European political groups remain uncertain for many national parties. All this is happening in a context where there are heightened fears of external attempts to influence elections\(^3\) and their follow-up.

Moreover, political cleavages – that is, the key dividing lines structuring European politics – are evolving\(^4\). Traditionally, the positioning on the left-right spectrum and on European integration, as well as national affiliations, have been key factors when seeking compromises and majorities on the European level. Increasingly, societal values\(^5\) are shaping the political discourse and views on salient issues such as immigration, resulting in changing coalitions on the national level. This not only makes the concrete policy implications of possible electoral outcomes more difficult to foresee. It also makes the political positioning of European leaders and parties more complex for citizens to read. In fact it is possible that beyond the majority that will be necessary to form the new Commission, ad-hoc majorities will arise depending on the issues at hand throughout the next parliamentary term (2019-24).

A better understanding of these cleavages is therefore necessary to get a sense of the political dynamics at play and the resulting political direction of the EU. For this purpose, the first section of this paper presents the expected political balance in the EU institutions after the European Parliament elections. The second section seeks to map the positioning of European parties along traditional and new political cleavages on the basis of empirical evidence. The third section concludes by assessing the implications for the functioning of the EU.

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2. Member States will hold elections on different days. On 23 May elections will be held in the Netherlands, on 24 May in Ireland and on 25 in Latvia, Malta and Slovakia. Elections will be held on both 24 and 25 in the Czech Republic. Election day for all the remaining Member States will be on 26 May 2019.


5. Societal values are defined as broad tendencies for the members of a given human group to prefer certain states of affairs over others. See Hofstede, G. (2001). Culture’s Consequences: Comparing Values, Behaviors, Institutions and Organizations across Nations. Thousand Oaks CA: Sage. We present an operationalisation of societal values in the political context in section 2.2.
1. THE POLITICAL BALANCE AT EU LEVEL
AFTER THE EUROPEAN PARLIAMENT ELECTIONS:
WHAT TO EXPECT?

The European Parliament elections will redefine the overall balance of power at EU level. They will not only determine political outcomes in the European Parliament itself, which co-decides EU legislation with the EU Council. They also matter for the EU executive, the European Commission, which has the monopoly of the power of initiative: the European Parliament elections will indeed have to be taken into account by the European Council when proposing a new president for the European Commission and by Member States when proposing commissioners. This is not just a formal exercise, as the consent of the European Parliament is required for these appointments. Moreover, decisions on other positions – for instance, the next presidents of the European Parliament and the European Council – will need to keep an overall balance along various dimensions. These include the need of taking the respective strengths of the various political groups in the European Parliament and the Council into account. A timeline of key political steps is presented in Figure 1.

We estimate the future political balance in the European Parliament based on current key political groupings at EU level, with some adjustments for smaller groups which may reconfigure themselves following the elections. Thus, we retain the existing mainstream political groups on the left and at the centre: radical left (European United Left / Nordic Green Left – GUE/NGL), greens, social democrats (Socialists & Democrats – S&D), liberal democrats (Alliance of Liberals and Democrats for Europe – ALDE), and Christian democrats (European People’s Party – EPP). In contrast, given the current uncertainty on the future of current political groups on the right (the European Conservatives and Reformists (ECR), Europe of Nations and Freedom (ENF) and Europe of Freedom and Direct Democracy (EFDD)) and how strong they could potentially be if they were to collaborate, either on an ad-hoc basis or by forming a single political group, we group them together as the "anti-

7. Orbán’s Fidesz is kept within the EPP but could end up strengthening the anti-establishment right if it were to leave or be expelled from the EPP.
establishment right”, also including a number of currently non-affiliated parties\(^8\). Finally, remaining parties that are not easily categorised based on what is known of their positioning are labelled as non-inscrits, distinguishing between Eurosceptic, Soft-Eurosceptic\(^9\) or Pro-EU non-inscrits parties. For instance, the Movimento Cinque Stelle falls in the non-inscrits (Eurosceptic) category\(^10\). Macron’s En Marche is categorised together with ALDE, given their similar political positioning, although En Marche has not at this point indicated which group it will join.

Methodologically, we use a more ‘cautious’ approach than existing projections\(^11\) to account for possible polling errors. For this purpose, we correct the results extrapolating polls errors witnessed in 2014 on the political group level. This results in giving more weight to green and Eurosceptic parties than existing polls\(^12\) as polls had underestimated the performance of such political formations in previous elections. In addition, we take into account a number of other factors, including the change in the number of total seats due to Brexit, the new seat allocation by Member States and the heterogeneity in electoral thresholds. We also assess the implications of a long extension of the Brexit deadline that would imply participation of the UK in the European Parliament elections. In this respect, we create a dedicated category for UK parties supporting a hard Brexit (Conservatives and UKIP) to show visually their weight in the new parliament.\(^13\) The methodology is presented in more details in the Annex and the results are summarised in Figure 2.

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8. With the exception of the UK parties and M5S, this category includes all current members of the ECR, ENF and EFDD, and in addition AfD (Germany), Jobbik (Hungary), Kukiz’ (Poland) 15 and Vox (Spain). M5S is grouped as non-inscrit (Eurosceptic). UK Conservatives and UKIP are categorised as “Pro-Leave UK parties”.

9. The term soft-Euroscepticism is used “when there is not a principled objection to European integration or EU membership but where concerns on one (or a number) of policy areas lead to the expression of qualified opposition to the EU, or where there is a sense that ‘national interest’ is currently at odds with the EU trajectory” (Szczerbiak, A. and P. Taggart, eds., 2008. Opposing Europe? The comparative party politics of Euroscepticism, Vol. 2. Oxford: Oxford University Press).

10. The current group M5S belongs, EFDD, will be particularly weakened after Brexit and will no longer meet the requirements to form political groups in the European Parliament without new parties joining the group.

11. For example, the European Parliament published its own projections: link.

12. In a nutshell, our method consists of weighting current polls by their error in previous European elections. More details are provided in the Annex.

13. For the UK we use a poll on EU Elections from the 13-15th of March by Opinium. It should be noted that this poll does not explicitly include the new UK parties Change UK and the Brexit Party. Due to the proportional voting and the degree of dissatisfied voters in the UK at the moment, these parties could perform better than what the polling data suggests for now.
The next European Parliament will likely be more fragmented, less pro-European and contain a larger number of Members of the European Parliament (MEPs) belonging to the anti-establishment right. In the new European Parliament, pro-European parties will likely hold a majority, though weaker than the current one. A coalition of EPP and S&D will no longer command more than 50% of the votes according to our estimates, nor would a left (radical left, greens and S&D), centre-left (S&D, ALDE and greens), centre-right (ALDE and EPP) or a right wing (EPP and anti-establishment right) coalition. The S&D will see its share of seats decline very significantly – reflecting the ongoing fall in support for social democratic parties across Europe – whereas also the EPP share will decrease significantly. As a result a renewed pro-European majority will require that ALDE join the EPP and S&D in appointing the new Commission. This is not entirely new as ALDE had supported the appointment of the Juncker Commission in 2014, but it was not numerically needed at that time. ALDE would be strengthened should it receive the support of Macron’s En Marche. On the left fringe, members of GUE and other new left parties could make marginal electoral gains; likewise for the Greens after recent upsurges by Green parties in some EU Member States.

Anti-establishment right-wing parties are expected to increase their share of seats significantly, and could become the second force in the European Parliament ahead of S&D should they agree to coalesce in spite of their differences. According to our estimates, Eurosceptic parties across the continent will improve on their positions and could possibly make up a third of the European Parliament seats after the elections in May. Even if they managed to unite, they would not however be able to form a majority even together with

14. We consider pro-European parties those that belong to the following political groups: EPP, ALDE, S&D and the Greens.
15. In France and Germany, the socialist parties are expected to lose half and one third of their seats respectively, according to our estimates.
16. This share would be further reduced (by 12 seats according to our projections) should Orbán’s Fidesz leave the EPP.
the EPP, unless joined by other Eurosceptic parties such as the UK’s pro-leave parties. While such a coalition is very unlikely, informal coalitions may be formed for specific purposes, similar to the coalition that allowed the election of an EPP candidate, Antonio Tajani, as President of the European Parliament in January 2017 with the support of ALDE and ECR, against an S&D candidate.

The participation of the UK in the European Parliament elections would not decisively impact the new balance of power. The EPP would be weaker as a result, since the UK has no parties in the group, but would still hold one fourth of the European Parliament’s seats. Conversely, the participation of the UK in the elections would limit the S&D losses, as the UK Labour party would remain. The positioning of British parties favourable to a hard Brexit (Conservatives and UKIP) would have to be seen, but they could further strengthen anti-establishment right and Eurosceptic parties.

The new political balance of power in the EU can only be fully assessed by taking into account the current balance in the European Council, where S&D, EPP and ALDE/En Marche will also hold a qualified majority but with a stronger position of ALDE/En Marche. Based on the affiliation of the party that holds the post of head of state or government in each Member State, it is possible to identify the political balance in the European Council for the same political groups as in the European Parliament. As of March 2019, EU Member States had leaders affiliated to EPP (9), ALDE (9), S&D (6), GUE/NGL (1), ECR (2), ENF/EFDD (1). Despite electoral victories for anti-establishment parties, for example in Italy, the representatives affiliated to S&D, EPP, ALDE and En Marche still make up above 55% of the Members representing at least 65% of the EU population, which is required for a qualified majority vote (Figure 3). However, the increasing representation of ALDE in the Council and its swing role as part of the coalition in the parliament would probably make it more assertive in the appointment of a new Commission president. In fact, ALDE, together with the EPP, now has the greatest number of heads of state and government, and hence European Council members, representing nine countries out of the EU28. This suggests that a grand bargain for the position of Commission President and other key positions may be more likely than adherence to the Spitzenkandidaten process, setting the scene for a potential clash between the European Council and the European Parliament.

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18. In the European Council, the heads of state or government of the EU Member States define the European Union’s overall political direction and priorities. In the EU Council, EU Member States act as co-legislator and adopt the EU budget alongside the European Parliament, define EU foreign and security policy, conclude international agreements and coordinate national policies in specific fields. This body can convene in many separate configurations, leading to different parties being represented depending on the minister attending for countries with coalition governments, and thus the political balance of the EU Council is not illustrated in figure 3, although the balance in the European Council gives a reasonable proxy.

19. In some Member States the posts may be held by different parties. In the case of France and Lithuania, we use the affiliation of the President as this is the person that represents the country in the Council and sets the political agenda. We assume that President Macron (France) affiliated to ALDE and President Grybauskaitė (Lithuania) is affiliated to the EPP. In the case of Romania, we use the prime minister affiliation as the President is effectively constrained by a mandate from the government despite attending the summits in person.

20. Lead candidates put forward by European political groups for the position of European Commission President are called “Spitzenkandidaten”. Jean-Claude Juncker was appointed as President of the Commission in 2014 after being the lead candidate for the EPP. In the context of the 2019 campaign, while the EPP (Manfred Weber) and S&D (Frans Timmermans) have put forward one Spitzenkandidat, the Greens have for instance nominated two (Ska Keller and Bas Eickhout), whereas ALDE has presented a team of candidates for top EU jobs (Guy Verhofstadt, Sylvie Goulard, Margrethe Vestager, Cecilia Malmström, Hans van Baalen, Emma Bonino and Violeta Bulc).

21. The European Parliament has called for the future President of the Commission to be a Spitzenkandidat.
FIGURE 3: Political balance in the European Council at EU28

COMPOSITION OF THE EUROPEAN COUNCIL
Number of EU Member States by European Parliament Political Group Affiliation

COMPOSITION OF THE EUROPEAN COUNCIL
Share of EU Population (%) by European Parliament Political Group Affiliation
2. MAPPING CLEAVAGES IN EUROPEAN POLITICS

Understanding how traditional and newer cleavages are structuring EU politics through the positioning of individual parties and European political groups is key to analysing the current political dynamics and the likely direction of the EU in the next European Parliament term. This section therefore provides a quantified measurement for European groups and individual parties’ respective positioning along various cleavages, based on new empirical evidence.

2.1 Traditional cleavages at work: the role of political positioning on the left-right and pro-anti EU spectrum

The theory of cleavages defines the latter as “a form of political structuring of the systems of authority applied to a territory”. It classically identifies four fundamental political cleavages that were born and developed under the dual effect of the development of the nation-state and capitalism: centre/periphery, Church/State, rural/urban and owners/workers. Historically, the development of the working class and the introduction of universal suffrage have imposed the domination of the class divide along a left/right axis, which has traditionally structured the functioning of national political systems in Europe until recently. At European Union level, two other types of cleavages have crossed this left/right divide: the cleavage between supporters and opponents of European integration and the cleavages between Member States.

In the 1970s, this classic left/right divide underwent major transformations as a result of various factors: the decline of collective structures such as trade unions and churches, the increasing volatility of voters, the development of new political parties such as environmental parties, etc. These transformations have led political science to identify new dividing lines, particularly societal and cultural, crossing the traditional left/right divide. The European political space and partisan political competition, at least in the West, is seen as increasingly structured along two axes: the left/right divide, on the one hand, and the divide between “materialist” values (which structured the right/left divide around socio-economic issues - social protection and the welfare state, redistribution, market regulation by the state, etc.) and “post-materialist” values (impacting and transforming the role of authority, the family and minorities - religious, sexual, ethnic - in European societies).

In this perspective, the theory of cleavages puts forward the hypothesis of a weakening of traditional political cleavages which would be increasingly replaced by a structuring of political conflicts on a cultural basis, opposing the supporters of the “open society” to the defenders of the “closed society”.

Economic and cultural factors can intersect. International economic openness and increased competition create both winners and losers. But beyond the mere socio-economic impact, the globalisation of the economy also produces effects and trends that are reinforced

in times of crisis: internally, the return of aspirations to withdraw into the national state; hostility towards foreigners and the return of xenophobic discourse, foreigners being used as “scapegoats”28 responsible for economic and social ills, including insecurity; externally, the desire to return to controls of national borders, which has advanced in recent years due to the refugee crisis and terrorist attacks, as well as the desire to protect oneself against migration from the East and the South. This leads to a growing divide between the beneficiaries of economic and cultural integration and those who consider themselves the losers29.

Do traditional cleavages still have practical implications? Are categories such as left and right still useful to understand today’s politics? The answer to both from empirical evidence is “yes”. Analysing all roll-call votes cast in the European Parliament from 1979 to 2004, Hix, Noury and Roland30 found that the left-right cleavage was able to explain most of the MEPs’ voting behaviour before the crisis. In particular, they found that the dimension that could explain the highest share of votes had radical left parties on one of its poles, and far right parties on the opposite extreme. The centre of the dimension was occupied by the socialists, leaning more toward the radical left pole, and the centre-right Christian Democrats (EPP), leaning more toward the opposite pole. Interestingly, they identified also a second, less relevant, dimension, highly correlated with MEPs’ support for European integration. However, parties on the pro-European pole were also more likely to be in government in their own Member State, or to have Commissioners, making unclear whether this second dimension captured a pro-/anti-EU cleavage or a government-opposition conflict. While these findings show the practical relevance of cleavages for the analysis of European politics, they all describe the political context before the crisis.

According to Hooghe and Marks31, the euro crisis and the migration crisis largely changed the political landscape in Europe, leading to the emergence of a new transnational cleavage, which took over the traditional left and right conflict. In their view, the new dominant division in European politics is between those who defend national sovereignty and national culture and are trade-sceptics, against those who are in favour of higher economic and cultural integration.

Cheysson and Fraccaroli32 have shed new light on the ideological transition in the European Parliament throughout the crisis. They collected all roll-call votes from 2004 to 2018 and extracted the main dimensions driving MEPs’ voting behaviour.33 Secondly, they tracked their evolution through time, noticing that the crisis marked a turning point in the ideological history of the European Parliament. As Fig. 4 shows, in the years of the crisis the European dimension surpassed the traditional left-right dimension in explaining MEPs’ voting behaviour.34 The turning point was 2010, the year in which the financial crisis turned into a sovereign debt crisis in the euro area.

33. Differently from previous works, Cheysson and Fraccaroli (2019) did not rely on the NOMINATE scaling method, but on a plain Principal Component Analysis on the votes. This allows vote-scraping to identify the most significant votes that determine each dimension.
34. The scores of Cheysson and Fraccaroli (2019) are however not comparable to those in the works of Hix, Noury and Roland, as they are based on different approaches. Still, both approaches identify dimensions of similar natures.
Fig. 5 shows how political groups located on the left-right and pro/anti-EU dimension respectively during the current parliamentary term (8th European Parliament, 2014-2019). Each dot represents a single MEP, coloured by her political group membership, and located according to her score on the two main dimensions extracted on the basis of that MEP voting behaviour. The most important cleavage, i.e. the dimension able to explain the largest share of votes (26.42%), is the one represented by values on the vertical axis, which corresponds to the European dimension as explained below, whereas the second cleavage (20.39%) is represented by values on the horizontal axis, which corresponds to MEPs’ stances on the left-right dimension. In practical terms, this means that out of all the possible coalitions ever formed by MEPs on every single vote of the 2014-19 term, the most likely alliances were those formed on the European dimension, whereas the second most-likely alliances were those formed on the left-right dimension.

35. In other words, by looking at how all MEPs voted on the 9,682 votes casted between 2014 and 2019, Cheysson and Fraccaroli (2019) identified two recurring voting patterns, or cleavages, and computed the score of each MEP for each of these pattern.
The left-right cleavage is no longer the most important dimension, in contrast with the last 30 years of parliamentary voting, and comes only in second. Fig. 5’s x-axis, in fact, can clearly be associated with the left-right divide: the radical left (GUE/NGL) and Greens are placed at one pole, whereas the other pole is occupied by the conservatives (mainly the
British Tories and the Polish Law and Justice). In line with this interpretation, the centre of the spectrum is occupied by the liberal democrats (ALDE), the centre-left (S&D), which is leaning more toward the left, and the centre-right (EPP), leaning more toward the right side. The location of many ENF MEPs at the centre of the spectrum is however puzzling, as such group is often associated to far right nationalism (examples of ENF members are Le Pen’s Rassemblement National and Salvini’s Lega). This is mainly driven by economic votes, on which the far right has started to vote more similarly to the left. Economic matters such as unemployment and trade protectionism have brought far right parties closer to the left – a phenomenon that seems to be at play also in the US.

Following the next European Parliament elections, parties’ positioning on European integration is expected to act as a centrifugal force in coalition building in the European Parliament for the appointment of the Commission, at the cost of significant heterogeneity on the left-right spectrum. Fig. 6 maps the position of individual national parties, together with their expected size and political group affiliation, according to their positioning on European integration (y-axis) and on the left-right spectrum (x-axis) according to the Chapel Hill Experts’ Survey. This chart can be compared to Fig. 5, which showed the voting behaviour along the same dimensions of MEPs in the previous term. Fig. 6 shows a significant dispersion of parties’ positioning on the left-right spectrum, including within political groups. Some parties belonging to the EPP are actually more to the right than some parties from the anti-establishment right. This suggests that while mainstream political groups have been so far effective at keeping a cohesive voting behaviour in the previous term, it might be more difficult to do so in the next European Parliament on the basis of the left-right spectrum, in view of the expected electoral losses of the mainstream groups and the strengthening of the anti-establishment right. In particular, some of the losses of the mainstream groups may be attributed by some parties or MEPs to a perceived blurring of the left-right divide, thus reducing the incentive to form a coalition that does not reflect that cleavage. Instead, Fig.6 clearly shows that, among traditional cleavages, what can bring together the S&D, EPP and ALDE (and if necessary also the Greens) – and thus a majority of MEPs – is the positioning on European integration, with few exceptions in the EPP that may thus prefer to see a right-wing coalition. Parties at the centre of the left/right dimension may play a pivotal role in building such pro-European majorities (e.g. Macron’s En Marche and ALDE members). While a coalition on the basis of party positioning on EU constitutional issues such as the appointment of the European Commission will come at the cost of a very high heterogeneity on the left-right spectrum, a coalition based on the left-right dimension would require bringing together parties/groups with widely diverging views on European integration. Majorities based on the left-right dimension may however be formed in support of legislation in specific policy areas, as has already been the case in the current term. Fig. 6 also allows to identify parties that will be tempted to dissent as their positioning is distant from the centre of gravity of their group: examples include Romania’s Social Democratic party within the S&D, Fidesz and the Polish People’s Party within the EPP and Czech Republic’s ANO 2011 within ALDE.

36. For more details, see Cheysson and Fraccaroli (2019).
37. See Poole and Rosenthal (1997), op. cit.
38. The Chapel Hill expert surveys estimate party positioning on European integration, ideology and policy issues for national parties in a variety of European countries. The first survey was conducted in 1999, with subsequent waves in 2002, 2006, 2010, 2014 and 2017 (Flash Survey). The question used to determine European integration positioning was “How would you describe the general position on European integration that the party leadership took over the course of 2017?” and the possible answers were 1 = Strongly opposed, 2 = Opposed, 3 = Somewhat opposed, 4 = Neutral, 5 = Somewhat in favour, 6 = In favour, 7 = Strongly in favour. More on methodology in the Annex.
2.2 New cleavages in European politics?
The role of societal values and salient issues such as immigration

While more traditional cleavages such as views on European integration are still expected to play a role, cleavages related to societal values are increasingly shaping the political discourse and views on salient issues such as immigration. These cleavages are likely to be at the centre of the campaign and could be the basis for the formation of majorities on selected topics in the next Parliament.

This is partly the result of a strategic shift from traditionally eurosceptic parties, which see more potential in advocating European policies reflecting their ideologies rather than in an outright rejection of the EU in the form of Europhobia. At the end of the 2000s, academic literature distinguished “soft” Euroscepticism from “hard” Euroscepticism in order to distinguish protest from outright rejection in the form of Europhobia. In the first case, it is a Euroscepticism that accepts the principle of European integration while criticising some of its public policies; in the second, it is a Euroscepticism of principle defined as a pure and simple rejection of membership of the Union and a desire to leave it. While public trust in the EU remains low, it is noteworthy that support for EU membership has increased significantly over the past three years (Fig. 7).

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referendum suggest that public opinion has become more favourable to EU membership. It is remarkable that this development can also be observed in Member States currently governed by national-populist and illiberal political forces, such as Hungary and Poland. Moreover, as shown in Fig. 8, in no Member State is there a “Europhobic” majority in favour of leaving the European Union (“exit”) including in Hungary, Poland and Italy, even though this does not prevent “eurosceptic” critics from expressing themselves on certain aspects of this Union (“voice”) which feed the crisis of legitimacy of the European Union. The same applies to another form of euroscepticism, opposition to the single currency. Support for the euro stands at a record high on average in the euro area and a majority supports the euro in all euro area Member States (Figure 9). In such a context, Eurosceptic parties seem to consider that the electoral gains from a merely anti-European discourse (anti-EU and/or anti-euro) have decreased. Some like the AfD in Germany have nevertheless tried to not entirely abandon their eurosceptic stance by conditioning support for their country’s continued membership of the EU on reforms in line with their political agenda. This approach of “reform or leave” is similar to that used by David Cameron before the Brexit referendum.

**FIGURE 7** Public opinion regarding participation in the EU (2007-2018)

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Source: Eurobarometer Survey 90, European Parliament, October 2018

42. “Post-Brexit, Europeans More Favorable Towards EU”, Pew Research Centre, June 2017 - See also: “Brexit has raised support for the European Union”, Bertelsmann Stiftung, November 21 2016

43. Hirschmann, A. O. (1972), Exit, Voice and Loyalty, Harvard University Press. Hirschman distinguishes two alternative modes of expression of dissatisfaction with organizations: “exit”, which consists in leaving the organization, and “voice”, which consists in voicing dissatisfaction with the aim of influencing and changing the organisation. “Loyalty” in turn may delay the expression of dissatisfaction and affect the choice between “exit” and “voice”.

44. 75% of euro area respondents support the single currency, while 20% are against it. Only in spring 2003 did the euro find as much support among citizens. Among euro area countries, support is lowest but rising in Italy (63%, +2pp), and highest in Slovenia (86%, +2pp) (Source: Standard Eurobarometer Survey (EB 90), November 2018).
FIGURE 8 - Attitudes towards EU membership at national level (October 2018)

QA3s  If a referendum was held tomorrow regarding (OUR COUNTRY)'s membership of the EU, how would you vote?

(%)  

Source: Eurobarometer Survey 90, European Parliament, October 2018

FIGURE 9 - Support for the Economic Monetary Union and the euro in EU Member states (November 2018)

Source: Standard Eurobarometer Survey (EB 90), November 2018
The structuring of the European political debate therefore focuses less and less on the cleavage between pro and anti-European but more on the cleavage between the values opposing "cultural liberalism" and conservatism or even reactionary ideology. The political struggle led by the Eurosceptics is no longer so much against the European Union as such, but more against what the Union represents in terms of values: with few exceptions, the Eurosceptic parties to the right of the political spectrum no longer question the principle of belonging to the Union, but the fact that the EU represents a threat to the values – particularly religious values – of European civilisation by promoting multiculturalism, sexual freedom and a relationship with the authority that would weaken the latter.

This also explains why eurosceptic political forces seek to promote at European level their fight on values and their political discourse on identity with its implications in terms of public policies, particularly in the field of immigration. Beyond the now well-known political and economic factors, the strengthening of national-populisms in Europe is linked to the impact of the migration crisis on the importance of the immigration issue for European public opinion. Europeans consider immigration to be the most important issue facing the EU (Fig. 10). This concern is considered the top priority in more than two thirds of the EU Member States. While the concern for immigration is now lower than it was at its 2016 peak (which followed shortly the 2015 peak in the influx of refugees), it remains higher on the agenda than the economic situation, which has been receding in most Member States since the peak of the economic crisis (Fig. 11). In many EU Member States, more than 50% of the citizens mention immigration as one of the two most pressing issues facing the EU, even though the number of irregular arrivals has been reduced by more than 90% since the 2015 peak, with 137,000 irregular arrivals in 2018 in a Union of 512 million inhabitants. This suggests first that European citizens’ concerns about migration are now more directed towards the existing stock of migrants living in Europe rather than the flow of new arrivals. Second, anti-immigration parties have been able to exploit the immigration crisis in 2015 successfully by redirecting the political discourse towards this issue in a structural rather than cyclical way. This discourse has resonated with voter groups whose main concerns are cultural or for whom cultural concerns interact with economic ones as explained in section 2.1. It also resonates for those who consider that immigration increases the pressure in some areas of public policy (e.g. housing, schooling, training), even where this is not linked to cultural fears.

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FIGURE 10 - Salient issues at EU level

**SALIENT ISSUES IN THE EUROPEAN UNION**

What do you think are the two most important issues facing EU at the moment?

<table>
<thead>
<tr>
<th>Year</th>
<th>Economic situation</th>
<th>Unemployment</th>
<th>Terrorism</th>
<th>Immigration</th>
<th>Crime</th>
<th>Environment</th>
<th>Rising prices</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>61%</td>
<td>58%</td>
<td>53%</td>
<td>40%</td>
<td>40%</td>
<td>37%</td>
<td>32%</td>
</tr>
<tr>
<td>2012</td>
<td>55%</td>
<td>33%</td>
<td>37%</td>
<td>26%</td>
<td>36%</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>2013</td>
<td>40%</td>
<td>40%</td>
<td>37%</td>
<td>20%</td>
<td>18%</td>
<td>16%</td>
<td>12%</td>
</tr>
<tr>
<td>2014</td>
<td>47%</td>
<td>47%</td>
<td>40%</td>
<td>26%</td>
<td>26%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>2015</td>
<td>51%</td>
<td>41%</td>
<td>41%</td>
<td>18%</td>
<td>26%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>2016</td>
<td>47%</td>
<td>51%</td>
<td>44%</td>
<td>26%</td>
<td>26%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>2017</td>
<td>51%</td>
<td>41%</td>
<td>41%</td>
<td>18%</td>
<td>12%</td>
<td>18%</td>
<td>12%</td>
</tr>
<tr>
<td>2018</td>
<td>47%</td>
<td>51%</td>
<td>44%</td>
<td>26%</td>
<td>26%</td>
<td>18%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**NOTE:** Results are a simple average across Member States and not weighted for the size of each country.

*Source: Standard Eurobarometer surveys*
FIGURE 11 - Salient issues in EU Member States: immigration and economic situation

SALIENCE OF IMMIGRATION IN EU COUNTRIES
Share of people (%) answering immigration as one of the two most pressing issue facing EU

Share of people (%) answering economic situation as one of the two most pressing issue facing EU

Source: Standard Eurobarometer surveys
In this context, national-populist political forces have experienced strong dynamics in various European countries such as France, Denmark, Hungary, Poland and Sweden. As Pascal Perrineau has clearly shown, “the projection of the migration issue at the forefront of European concerns is an element that favours the dynamics of nationalist and populist parties insofar as they have often been or have often appeared on the various national political scenes as ‘anti-immigrant parties’”\(^{51}\). Ivan Krastev also emphasises how these dynamics are questioning the liberal democracy model that underpins the EU project: “The migratory revolution (...) has led to the emergence of threatened majorities which now represent a major political force in Europe (...). Rather than the economic crisis or the worsening of social inequalities, it is the failure of liberalism to address the migration problem that explains why public opinion has turned against it”\(^{52}\). While the European identity may be perceived as difficult to grasp by its citizens, notably in view of its evolving borders, and cultural, historical and geopolitical diversity\(^{53}\), the Union is based on a community of values cited by the EU Treaties. They include the respect for human dignity and human rights, fundamental freedoms, equality of citizens before the law, the rule of law, parliamentary democracy. These values - and this is perhaps the most specifically “European” aspect - are implemented in the light of the historical experience of the European peoples, around four main elements: the renunciation of force in relations among its members and the preference for peaceful conflict resolution; an emphasis on solidarity and the search for social justice through the state; a vision of international relations that aims to jointly exercise sovereignty instead of separately; a spirit of moderation, tolerance, openness and mistrust towards political passions which are potentially leading to excesses, authoritarianism and nationalism. All this is embodied in the European political project, as promoted by the founding fathers in the 1950s. While this core set of values distinguishes Europe from the rest of the world, it is increasingly being questioned across European societies. Political forces that display a hostile attitude towards them are progressing. While this wave concerns practically all European democracies, it manifests itself in a very variable way and seems to draw a divide between Eastern and Western European countries, although this divide is more complex than is often described\(^{54}\).

The migration issue and the issues related to values and identity therefore constitute the core of a change in the political offer of traditionally eurosceptic forces insofar as these issues make it possible to formulate and promote political discourses that differentiate and divide. In this sense, cultural issues favour politicisation of European issues on highly charged topics on which nationalist, illiberal and eurosceptic parties can capitalise more strongly than their opponents. Moreover, issues relating to values, identity and immigration can be more easily exploited politically if they give the impression that politicians still have room for manoeuvre to act. The cultural divide can indeed be seen as allowing to break with what Ivan Krastev called the “rhetoric of impossibilism”. Krastev notes in this respect: “It is much easier and politically more effective to stop a boat full of migrants than to protect jobs. Matteo Salvini understood this well”\(^{55}\). Since the EU is perceived as placing constraints by protecting the EU values and in particular the rule of law, changing the EU values or neutralising the constraints that the EU can place on their policies becomes a key objective for anti-establishment right-wing parties. In this respect, it is notable that the procedure under Article 7 of the Treaty on the European Union, which aims to ensure “all

EU countries respect the common values of the EU*, requires the consent of the European Parliament by an absolute majority of members and two thirds of the votes cast - excluding the abstentions. The European Parliament voted for instance in September 2018 to initiate the procedure as it considered that Hungary was at risk of breaching the EU’s founding values, despite the opposition of the anti-establishment right, pro-leave UK parties and some of the EPP members. Reaching the two-third majority required for such a vote is thus likely to be significantly more difficult in the next parliament.

When mapping cleavages relating to societal values and immigration, even if they are not linked to specific EU competences, a clear correlation emerges with the left-right divide, which might contribute to revive this traditional cleavage. Parties belonging to the EPP and the anti-establishment right front tend to support more traditional and nationalist values, in contrast to the libertarian and cosmopolitan approach of the socialists, the liberals, the greens and the radical left (Figure 12). While a stable majority based on this dividing line seems unlikely as long as a majority in the EPP sticks to the current core EU values and support for further European integration, centre-right and far right party might form ad-hoc majorities based on their common ideological stance and positions on salient societal issues such as immigration (Figure 13). Importantly, this may also impact on the centre of gravity of the EPP and make it more difficult for the S&D and ALDE to be in a stable coalition with the EPP beyond the initial appointment of the Commission.
values and the lower the score the more libertarian and postmaterialist values. This is called the GAL-TAN index, whereby "Libertarian" or "postmaterialist" parties favour expanded personal freedoms, for example, access to abortion, active euthanasia, same-sex marriage, or greater democratic participation. "Traditional" or "authoritarian" parties often reject these ideas; they value order, tradition, and stability, and believe that the government should be a firm moral authority on social and cultural issues. See also Polk, J et al. (2017) “Explaining the salience of anti-elitism and reducing political corruption for political parties in Europe with the 2014 Chapel Hill Expert Survey data” Research & Politics (January-March): 1-9.
3. IMPLICATIONS
FOR THE FUNCTIONING OF THE EU

In light of the expected political fragmentation at EU level, it will likely be more difficult to form strong and stable majorities at the European level, which could strengthen intergovernmentalism to the detriment of the Community Method. Political fragmentation stems both from the higher number of parties needed to agree on a majority in Parliament (and also in the Council) and from the diversification of the cleavages (positioning on the left-right spectrum, European integration, salient issues and values). In a context where it will be more difficult to form European majorities and where traditionally eurosceptic parties will be stronger, divisions according to perceived national interests may also play a more important role, for instance in the form of national industrial policy considerations. These factors, together with the weaker and possibly more heterogeneous majority supporting the next Commission, could further weaken the Commission and the European Parliament in the interinstitutional balance of power, and thus the Community method compared to the intergovernmental approach. As supranational institutions are weakened, the European Council and the Council may indeed more often have the last word about decisions and policies of the EU over the Commission and the European Parliament. At the same time, beyond asserting its own institutional role, the Council is also divided which may reduce the likelihood and ambition of political compromises among Member States. Divisions in the EU Council are reflected in ‘alliances’ among subsets of Member States, which vary depending on the issue at stake; France and Germany have traditionally sought to act as an engine of integration; the Netherlands has built a group of like-minded countries (the ‘Hanseatic League’) on economic issues to seek to compensate for the impact of the UK leaving, some central and Eastern European countries have formed the Visegrád Group (Poland, Hungary, Czech republic, Slovakia) and Southern countries have been seen as having a possible convergence of interests in view of their exposures to immigration flows and economic fragilities. Figure 14 suggests that the cohesion of these groups may be buttressed by their internal political dynamics. Conservatives dominate the Visegrád Group, liberals the Hanseatic League, moderate parties the Franco-German engine, whereas Southern countries face overall major political fragmentation that allowed the accession of radical parties to power in some of them. To some extent this will be reflected also in groups in the European Parliament, where parties dominating in some countries (e.g. Poland, Italy) are likely to not be represented in the coalition forming the Commission, creating an incentive for them to seek alternative majorities on dedicated topics during the 2019-24 term in pursuit of their perceived national interest.
The fragmented parliamentary composition and the disagreement in the European Council over the Spitzenkandidaten process may also delay the appointment of a new Commission. The vote in the European Parliament on the new Commission President is expected to take place in mid-July; however, the coalition negotiations to form a new Commission may take longer than expected depending on the complexity of the political landscape. As both the Council’s and the European Parliament’s position on the process is unclear, there could potentially be a standoff between the Council and the European Parliament that prolongs the process. If a candidate is rejected by the European Parliament, the Council has to put forward a new candidate within one month. Depending on the time needed for the appointment of the Commission, progress on legislative files at EU level could also be delayed. The European Parliament’s activity on these files is already expected to be interrupted from mid-April until November. The European Parliament will need time to reconfigure groups, assign positions and decide whether to continue or discontinue work on files that will not have been completed in the current term. No new initiatives are expected to be taken by the Commission in this period. Work on legislative files is expected to resume when the new Commission takes office.

The increased political and arithmetic difficulty of forming majorities could lead to less ambitious legislative proposals and European Parliament positions. Moving beyond the immediate coalition building for the Commission, the increasingly fractionalized parliament will make the process of building working coalitions in the parliament more fragile. The need for increased consultation among political groups to form broader agreements on legislative files could make the negotiating process more time-consuming and increase the likelihood of watered-down proposals to facilitate reaching a common understanding. Secondly, the parties of the anti-establishment right may seek to form alternative majorities on specific issues such as immigration and economic policy. This in turn could weaken trust among the EPP, S&D and ALDE and thereby reduce the willingness to compromise elsewhere. Third,
where the anti-establishment right cannot achieve its aims by forming alternative majorities, they may seek to disrupt the legislative process on policy issues of importance to them, using the MEPs they will have in key committee positions or issuing large amounts of amendments to legislative proposals. Fourthly, in specific policy areas such as on trade, the anti-globalist parties on the far-right and the far-left may take similar positions and coalesce in seeking to block agreements and legislative proposals.
Evolving political cleavages and the expected outcome of the European Parliament elections will influence the political balance and direction of the new European Parliament and European Commission for the next five years. The next European Parliament will likely be more fragmented and contain a larger number of Members of the European Parliament (MEPs) belonging to the anti-establishment right, even more so should the UK participate in the European elections. This will in turn make the formation of strong and stable majorities at European level more difficult. Moreover, changes in the political landscape could lead majorities in the European Parliament to be increasingly based on cleavages related to societal values on selected topics. The latter may end-up reviving the left-right divide on policy choices related to salient issues such as immigration, whereas differences of views on European integration are expected to underpin majorities on EU constitutional issues. As regards the latter, the appointment of the next European Commission is expected to require an alliance between the centre-left (S&D), centre-right (EPP) and liberals (ALDE/En Marche), which also dominate the European Council. Differences of views between these groups and the increased political and arithmetic difficulty of forming majorities risk resulting in less ambitious legislative proposals in the next five years and in a strengthening of intergovernmentalism to the detriment of the Community Method.
ANNEX: METHODOLOGY

Projections of the outcome of the European Parliament elections

To estimate the composition of the European Parliament, we use the latest available polling data and correct for the pollster errors in percentages by Parliament political groups from the European Elections in 2014. As Giuliani (2018) has shown, even European polls do not account sufficiently for second-order election effects and therefore our methodology is a way of correcting for such errors to provide more robust results. In addition, to further improve accuracy we account for national electoral thresholds in each Member State and have adjusted the seats in accordance with the new seat allocation due to Brexit.

Thus, rather than simply relying on current polls, we estimate the errors of analogous polls for the EU elections in 2014. We use a dataset from Giuliani (2018), including various polls on European Elections from all European Member States, and calculate the errors as the percentage error in number of seats between the polls and actual outcome using the same calculation method. For simplicity and due to lack of more granular polling data, we assume that all countries have a proportional electoral system with one constituency.

Our estimate of the future composition is given by:

Estimated % of seats = Estimated % of seats in 2019 Polls * (1 - Error polls 2014)

Where,

Error polls 2014 = Actual % of seats gained in 2014 – Estimated % of seats in 2013 Autumn Polls

By way of example, suppose that political group A gained 200 seats in the 2014 elections, whereas, according to polls in Autumn 2013, it should have got 220 seats. This would create an error of 20 seats, which is a -10% decrease in its share of seats in the European Parliament (-20/200=0.1). The error for group A would hence be -10%. Suppose that the same group is expected to gain 190 seats according to 2018 Autumn polls. Our estimate adjusted by the error would then be: 190 * (1+Error) = 190 * (1-0.1) = 171 seats. As this method might generate too many or too few seats in the parliament, we then take the missing/excess seats and add/subtract equally across all party groups to reach the right number of seats in the parliament. Finally, we round the seats to the closest integer by each party group.

Figure 15 below shows the estimated error by political groups.
Eurobarometer data on salience of issues

To estimate the saliences of issues across European Member States we use time series of Eurobarometer surveys that asks survey respondents which issues the find the most pressing issues for the European Union at that moment. The respondents choose two issues from a defined list and we calculate the share as the number of people mentioning that issue as one of the two most pressing issues. More information about the Eurobarometer surveys can be found here: http://ec.europa.eu/commfrontoffice/publicopinion/index.cfm

Composition of European Council

To estimate the composition of the European Council by European Parliament political group affiliation we use a dataset from www.parlgov.org on party members of cabinets across European countries. We then extract the data across a time dimension and allocate each political party which holds the prime ministerial seat to a European Parliament political group based on our dataset for the EU elections and manual collection of data for parties that ceased to exist. In the case of France, we have adjusted the that to the party belonging of the president of the republic as this is the person that represents the country in the European Council. In addition, the latest prime minister of Italy has no European Parliament political group affiliation and thus has been allocated to ENF/EFDD as these are the affiliations of the Northern League and the Five Star Movement respectively.

The share of countries (%) is calculated as the share of total EU countries with representatives affiliated to one political group, taken into account EU accession of Member States that joined after 2000.

The share of total population (%) is calculated as the share of total EU population using yearly
data on the number of inhabitants in each EU Member State from the World Bank. Data on population is not available for 2018 and 2019, so these years have been approximated with the populations of 2017.

**Party positions using Chapel Hill Expert Surveys**

To estimate the party positions for European political parties we exploit the Chapel Hill Expert Surveys, available at www.chesdata.eu. We use the 2017 Flash Survey if this data is available for the specific party and if not, we use the data from the CHES European survey of 2014 in which all Member States are included.

The European Parliament political group affiliation and the seat share of each political party are taken from our own dataset on the EU elections, as outlined above.

**Vote shares by ideological party family in the EU**

To estimate the vote shares for each party family across EU Member States and blocs, we use electoral outcome data from www.parlgov.org and data on voting population from www.idea.int Voter Turnout Database. To calculate the number of voters for each party family, we multiply the vote share for each party with the voting population in each election. Doing so, we can aggregate the share of total voters for a specific party family across the EU or any subsection of the Member States.

The party family of each party of the dataset is taken as given from the parlgov.org dataset, except for Five Star Movement in Italy which has been reallocated from "Communist/Socialist" to "Special Issue".
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