



Political dynamics ahead of the European Parliament elections: implications for the EU's political direction and policy priorities

DEMOCRACY AND
CITIZENSHIP

POLICY PAPER N°302
MAY 2024

#politicaldynamics
#EuropeanParliament

• Executive Summary

This paper aims to analyze the political dynamics that prevail ahead of the European Parliament elections, in terms of the evolution of the partisan landscape, attitudes towards further European integration and the increasing fragmentation of European politics. It then investigates their political and institutional implications, first in terms of electoral participation and salient issues in the campaign, and second for the political balance of power and European policies in the next five years.

I CONTEXT MATTERS: THE IMPACT OF INTERNAL POLITICAL ENVIRONMENT AND EXTERNAL GEOPOLITICAL SITUATION ON THE 2024 EUROPEAN PARLIAMENT ELECTIONS

– The continued rise of ‘populist’ parties in Europe

Over the last 25 years, ‘populist’ parties (in particular from the far right) have gained seats and are currently estimated to hold more than 30% of the seats in national parliaments of EU member States, compared to less than 10% at the start of the century. The next elections to the European Parliament will take place in national, European and international contexts that support the rise of ‘populist’ parties along socio-economic, political, cultural and international dimensions. In such a context, current projections anticipate a significant surge in the seat share of ‘populist’ parties after the June 2024 elections.

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We would like to thank Ferdinand Dreher, Daniel Kapp, Sylvie Matelly, Cyprien Milea, Timothy Mulder, Hanni Schölermann and Steven de Vries for their valuable comments and input on this article.

The views of the authors are their own and not those of the institutions they work for.

- Attitudes towards further European integration: “normalisation” or “radicalisation”?

As generalised support for the EU recovered, especially after the difficulties of the Brexit process, Eurosceptic ‘populist’ parties moved away from hard forms of anti-EU sentiments ahead of the 2019 European Parliament elections. This suggests a form of “normalisation” of European political life: the European debate is no longer reduced to the divide for or against the European Union. It is now more focused on the political project, the direction of European policies and the shortcomings that have been revealed by successive crises. However, recent gains in the polls by far-right parties seem to give some of them enough confidence to return to traditional anti-European themes.

- The fragmentation of European politics: a quadripartition of the political landscape

The rise of ‘populist’ parties has profoundly changed European politics, resulting in a fragmentation of the political landscape that makes it more difficult to form majorities and weakens the executive. Political life in Member States is now characterised by quadripartition. Since 2000, traditional parties (centre-left and centre-right) have lost seats in national parliaments, while those further on the right and liberals have gained seats. A similar fragmentation and quadripartition can be observed at the European level.

I PARTICIPATION AND SALIENT ISSUES FOR THE 2024 EUROPEAN PARLIAMENT ELECTIONS

- Participation: increased interest in elections to the European Parliament

Turnout in European Parliament elections was on a secular decline from the first elections in 1979 to 2014. The 2019 elections broke the secular decline and demonstrated a renewed interest in EU politics. Looking ahead to the 2024 elections, this upswing in turnout is expected to continue: first, the European political sphere may have shifted further away from a simple ideological dichotomy of being for or against the EU in recent years, towards more focus on political priorities of the EU (at least for what concerns the electoral campaign); second, there is a broader understanding of the EU’s role in taking important decisions which can impact citizens’ lives; third, the geopolitical situation has increased the relevance of being a member of the EU in a more fragmented world where Europe seeks to position itself distinctly from other superpowers.

- Salient campaign issues: political demand and voter expectations

While the issue of immigration has gained traction recently in most European countries, data show that also other concerns and expectations rank high for European citizens. The Covid crisis marked a return of the salience of the economic situation, and concerns about inflation remain higher than prior to the energy shock. The most recent data points to a decline in the salience of climate change. The salience of the war in Ukraine is overall high among EU citizens, but with some heterogeneity across countries.

I WHAT POLITICAL BALANCE OF POWER AFTER THE 2024 EUROPEAN PARLIAMENT ELECTIONS? PROJECTIONS AND IMPACT FOR EUROPEAN POLICY IN THE NEXT FIVE YEARS

- What projections in terms of political and partisan balance of power after June 2024?

Current projections for the next European Parliament and the evolution of the composition of the European Council suggest the following balance of power in the upcoming legislature:

- The centre-right, centre-left and liberals would remain able to command a majority in both the European Parliament and the European Council, but this majority would be weaker.
- The European Parliament would shift to the right. This could lead the centre-right (EPP) to seek stronger influence. Overall, the representation of eurosceptic political groups would increase, although the share of clearly pro-EU political groups is projected to remain above 60%.
- More uncertainty and potentially instability in the European Parliament could lead the new Commission to seek broader support than the current coalition to pass legislation, potentially reducing policy ambition (lower common denominator) and focusing on issues that can command broader majorities. A key test for the political balance in the next term will be the appointment of the President of the European Commission.

- What European policy for the next five years?

On the economic front, the competitiveness of the EU and its ability to strengthen domestic sources of growth have emerged as key questions against the background of rising risks of trade fragmentation and massive subsidies by the US and China to their domestic companies in a context of geopolitical and technological competition. Another key issue for the next legislature will be the EU's strategic positioning in a world where it appears comparatively less determined and united in asserting its interests and values than other major geopolitical powers such as the US, China or Russia.

This suggests a policy agenda that is largely determined by external challenges. This may also affect priorities that were already present in the previous legislature's agenda, such as the green and digital transitions. Increased political fragmentation may however widen the gap between the magnitude of the challenges and the ability to agree on ambitious responses. The choice of personalities to lead EU institutions and how they exercise their roles will matter in this respect. While the role of President of the Commission will increasingly have to focus on building cross-party support for policy initiatives, a European Council President that is widely respected within Europe and globally would allow to provide a longer term, strategic vision and act as a guardian of the union.

• Introduction

The European Parliament elections (6-9 June 2024) will provide an important indication on the political direction of the European Union (EU) in the next five years. Not only will the political balance of power matter for key appointments at the helm of the EU executive and legislative branches – namely European Commission President, European Parliament President and Committee chairs, European Council President, and EU foreign affairs chief. It will also set the scene for the Union’s political debate, strategic priorities, and ability to take decisions in the next five years. And it will provide a snapshot on the state of public opinion in Europe.

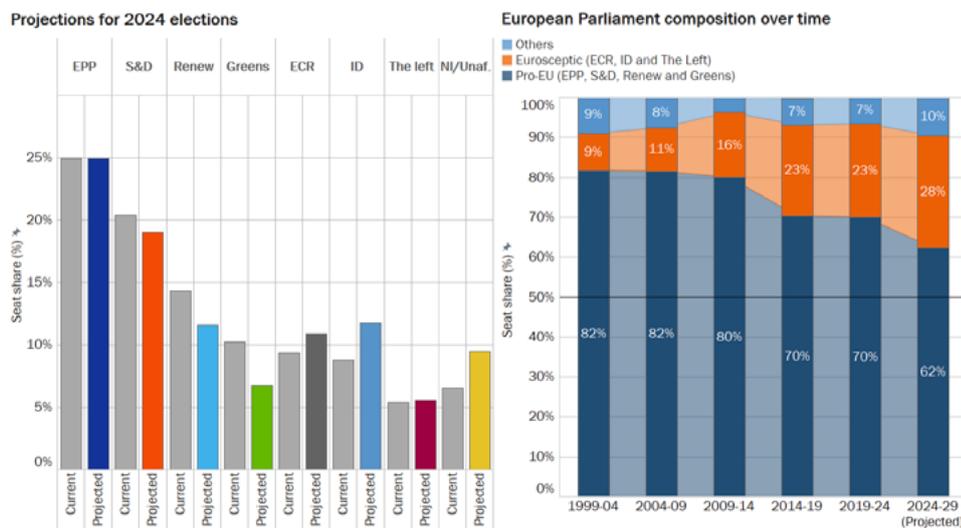
These elections are taking place at an extraordinary juncture. War has returned to Europe and the world is threatening to turn into a confrontation among major powers, where the EU is at risk of being increasingly isolated on the global stage. The economy is just emerging from six quarters of stagnation and the EU’s outward oriented economic model is being challenged by global trade fragmentation, a breakdown of the rules-based international order, as well as losses of competitiveness in the wake of the energy crisis. In parallel, the climate crisis is continuing unabated as scientists are raising ever more red flags about rising temperatures and extreme weather events¹. In addition, concerns among the public about immigration, identity and security (economic, external, and personal) are likely to lead to an electoral campaign focused on a defensive narrative rather than on a positive vision of the future.

Against this backdrop, projections indicate that the Pro-EU “majority” which supported the von der Leyen Commission and adopted EU legislation in the last five years is expected to shrink. While the European People’s Party (EPP, centre-right) is expected to remain the largest group and to account for about one fourth of the members of the European Parliament, the other political groups supporting the Commission, the Social Democrats (S&D, centre-left) and the liberals (Renew, centre), are expected to lose seats. Conversely, eurosceptic political groups further on the right – the European Conservatives and Reformists (ECR, conservative right) and Identity & Democracy (ID, far-right) are expected to gain seats, while the pro-EU Greens are expected to suffer significant losses. The Left (far-left) is projected to remain stable (see projections in Figure 1).

In this paper, we look at the political dynamics that prevail ahead of the elections, in terms of the evolution of the partisan landscape, attitudes towards further European integration and the increasing fragmentation of European politics. We then investigate their political and institutional implications, first for the European Parliament elections – in terms of participation and salient issues in the campaign – and second for the political balance of power and European policies in the next five years.

1 See the 2023 [European State of the Climate](#) report by the World Meteorological Organization and the Copernicus Climate Change Service. As noted in the report, “Europe has been warming twice as fast as the global average, becoming the fastest-warming continent on Earth”.

FIGURE 1. EUROPEAN PARLIAMENT ELECTIONS 2024
Projections per political group and over time



▲ Source: Politico, Europe Elects and European Parliament

▲ Note: Projected seat shares for each political group is measured as the average of two projections by Politico and Europe Elects. The projections were done on 1 April (Politico) and 31 March (Europe Elects). In the panel to the right, the Eurosceptic and Pro-EU groups in the past terms include relevant predecessors to existing political groups such as ALDE (currently Renew) and ENF (currently ID).

I • Context matters: the impact of the internal political environment and the external geopolitical situation on the 2024 European Parliament elections

I THE CONTINUED RISE OF ‘POPULIST’ PARTIES IN EUROPE

– The rise of the ‘populist’ far right

The political landscape in Europe has been characterized by a swift and widespread rise of populist parties, especially from the far right, over the last decade. This phenomenon has spread through almost all EU Member States and disrupted established political power balances. The term ‘populism’ captures a conception of politics organised around a confrontation between the ‘people’ and the ‘elites’ and a conception of political action in which the register of emotions is strongly mobilized.² More specifically, ‘populism’ rests on one or several of the following elements:

- The importance of the political divide, which crystallises in the opposition between the “people” and the “elites”, perceived as corrupt and denounced for having betrayed the will of the “true” people, considered to be the sole basis of legitimate authority (anti-elitism);³

² The term “populism” has a long history in the social sciences and refers to a political phenomenon that has been around for over 150 years. Caesarism and illiberalism during the Second Empire in France; in the years 1890-1914 again in France (Boulangisme), in Russia and the United States (People’s Party); in Latin America (Peronist movement in Argentina) then left-wing populism (Hugo Chavez in Venezuela; Morales in Bolivia). See Hermet, G. (2019), “*Narodniki, boulangisme, People’s Party: trois populismes fondateurs*”, in Badie, B., Vidal, D. (dir.), *Le retour des populismes. L’état du monde en 2019*, La découverte, p. 23-30 ; and Rosavallon, P. (2020), *Le siècle du populisme. Histoire, théorie, critique*, Le Seuil.

³ Mudde, C., Rovira Kaltwasser, C. (2017), *Populism: A very short introduction*, Oxford University Press.

- A unitary conception of the “people” and a conception of political representation according to which the people are embodied in a charismatic leader who claims to hold a monopoly on expressing the popular will (anti-pluralism).⁴ This is also reflected in a preference for direct democracy – allowing to give direct popular backing to the leader – and the use of referenda – which allow the leader to ask for popular support on its agenda;
- The criticism of political liberalism – checks and balances and the rule of law as key elements of democracies’ constitutions⁵ –, as well as of the legitimacy of independent institutions on the grounds that popular legitimacy would be the only source of legitimacy of power.⁶

In the EU, it is possible to distinguish at least three main categories of ‘populist’ families at present:

- **The populism of the far-right** claims that a national orientation is the best way to protect the people’s identity, security, economy and sovereignty. This is reflected in an emphasis on the issues of immigration, insecurity, national identity and Euroscepticism (“hard” or “soft”)⁷ and on promoting conservative/authoritarian values over progressive/liberal values. Parties with this orientation have joined either the “European Conservatives and Reformists” political group (which includes members of Fratelli d’Italia – the party of the Italian Prime Minister – and the Polish Law and Justice party – in power in Poland until December 2023) and “Identity and Democracy”, which includes the French Rassemblement National, Germany’s far-right Alternative für Deutschland party, and Geert Wilders’ party, which recently won the Dutch parliamentary elections;
- **The populism of the far-left** is characterised by a strong opposition between the people and the economic elites, a sceptical discourse against the EU seen as a neoliberal project that benefits capital to the detriment of workers, but also by a traditionally cosmopolitan and internationalist culture. The political parties and movements corresponding to this category are united within the Group of the United European Left in the European Parliament;
- **‘Populist’ movements which refuse to be classified at the left or the right of the political spectrum** and which adopt an anti-system rhetoric, denounce the corruption of the elites, and promote the use of direct democracy; this is the case, for example, of the Five Star Movement in Italy, which currently does not belong to any political group in the European Parliament.⁸

⁴ Müller J.-W. (2016), *What is Populism?*, University of Pennsylvania Press.

⁵ Mounk Y. (2018), *The People vs. Democracy. Why our Freedom is in Danger & How to Save It*, Harvard University Press; Chopin T. (2017), “The Populist Moment: Towards a post-liberal Europe?” *Les Cahiers européens de Sciences Po*, n°1, Paris, Centre d’études européennes.

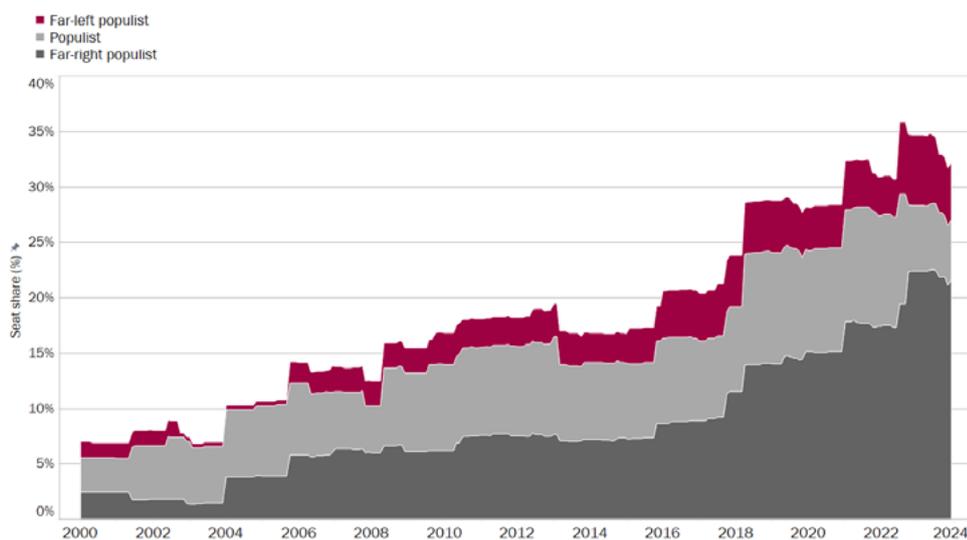
⁶ Populism is not necessarily incompatible with economic liberalism, particularly in its neoliberal form, as shown by certain examples in Latin America, where the term “neoliberal populism” has been used; see Weyland, K. (1996), “Neopopulism and neoliberalism in Latin America: Unexpected Affinities”, *Studies in Comparative International Development*, 31, 3-31. The current case of Javier Milei in Argentina is a current example of this form of populism.

⁷ ‘Soft Euroscepticism’ refers to the opposition to EU policies, while ‘hard Euroscepticism’ refers to opposition to the process of European integration itself.

⁸ This party, however, has mostly voted alongside far-left populist groups, while being member of the same political group of the far-right UKIP party from 2014 to 2017. See Cheysson, A. and N. Fraccaroli (2017) “Ideology in Times of Crisis: A Principal Component Analysis of Votes in the European Parliament, 2004-2019”, CEIS Tor Vergata Working Paper 461. https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3361832.

Far-right ‘populist’ parties have seen a continuous increase in seat shares over the past 25 years. Over the last 25 years, ‘populist’ parties in Europe have gradually gained support and are currently estimated to hold more than 30% of the seats in national parliaments of EU Member States, compared to less than 10% at the start of the century (Figure 2). While far-left and other populists parties have held relatively steady (or slightly growing) seat shares in recent years, support for far-right ‘populist’ parties has increased more significantly with their share of seats in national parliaments almost doubling from around 10% of seats in 2017 to around 20% of seats in December 2023.

FIGURE 2. POPULIST LANDSCAPE IN THE EU
Share of seats (%) in national parliaments held by ‘populist’ parties – EU



▲ Source: ParlGov⁹, The PopuList¹⁰ and own calculations.

▲ Note: Size of parliaments are normalized across countries and weighted for population size as well as adjusted for EU accessions. The latest observations are for December 2023. Populist parties as elaborated by The PopuList (2023) are defined as “parties that endorse the set of ideas that society is ultimately separated into two homogeneous and antagonistic groups, ‘the pure people’ versus ‘the corrupt elite’ and which argues that politics should be an expression of the *volonté générale* (general will) of the people”.

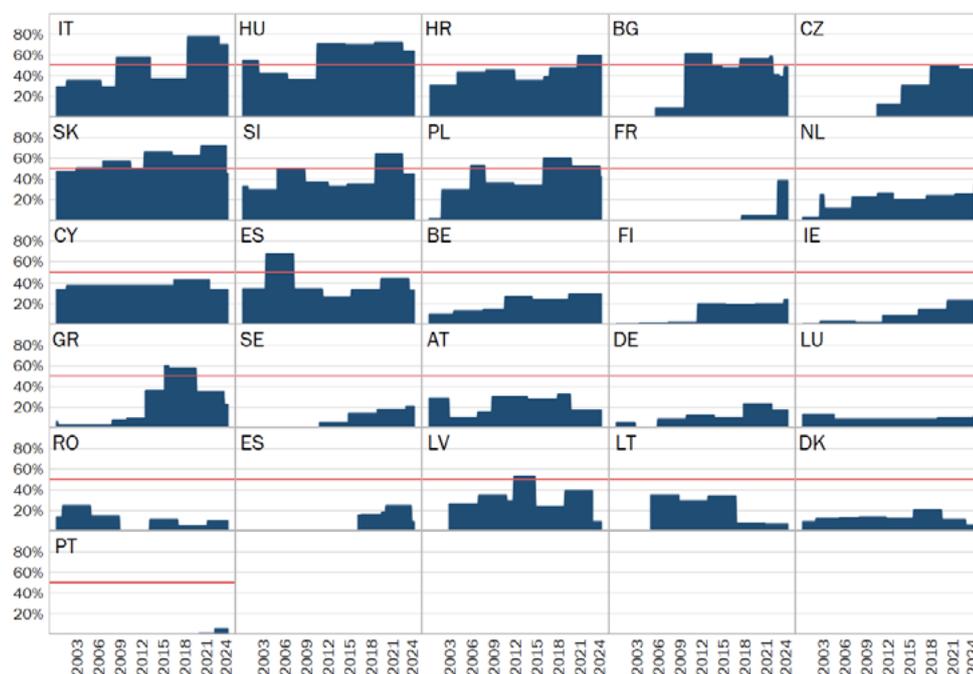
Across EU countries, ‘populist’ parties now hold a significant share of the seats in several national parliaments (Figure 3). In December 2023, ‘populist’ parties held a majority of the seats in three EU Member States, namely Italy (70%), Hungary (64%), Croatia (59%), and more than a third of seats in Bulgaria (49%), Slovakia (45%), Slovenia (44%), Poland (42%), France (38%), the Netherlands (35%), Cyprus (34%) and Spain (33%). While most countries in the EU have seen the seat shares of ‘populist’ parties grow in recent years, there are a few exceptions where the seat shares of these parties have declined. This includes for example Spain, where the far-right Vox party lost support in the recent elections and now controls only 9% of the seats in the parliament.

⁹ Döring, H., Huber, C. and Manow, P. (2023) *Parliaments and governments database (ParlGov): Information on parties, elections and cabinets in established democracies*.

¹⁰ Rooduijn, M., L.P. Pirro, A., Halikiopoulou, D., Froio, C., van Kessel, S., de Lange, S., Mudde, C., and Taggart, P. (2023) *The PopuList 3.0: An Overview of Populist, Far-left and Far-right Parties in Europe*. www.popu-list.org. DOI 10.17605/OSF.IO/2EWKQ.

FIGURE 3. POPULIST LANDSCAPE IN THE EU

Share of seats (%) in national parliaments held by 'populist' parties by country



▲ Source: ParlGov, The PopuList and own calculations

▲ Note: Malta is excluded as there are no parties in the country listed as populist. Latest observations are from December 2023.

The rise of 'populist' parties can also be observed at European level. In the 2019 European elections, 'populists' parties corresponding to one of the three categories mentioned above obtained 230 seats out of 751, i.e. almost one-third of the European Parliament, compared with just over one quarter in 2014¹¹. Current projections anticipate a significant surge in 'populist' parties after the June 2024 elections, driven by far-right and conservative parties and benefitting in particular the European Conservatives and Reformists and Identity and Democracy (Figure 1).

– Why are populist parties on the rise?

Over the past two decades, the rise of 'populist' parties across Europe has been driven by a complex interplay of multiple factors, rather than a single cause. As illustrated in Figure 3, the rise in public support for these parties has occurred in a relatively synchronized manner across EU Member States, suggesting that there are several common drivers. Scholars typically divide these underlying factors into economic and cultural drivers, although opinions vary on which driver plays a more important role and how these factors interact and reinforce each other.¹² It is important to recognise that, despite these commonalities, each country exhibits unique context-specific factors that significantly influence the prominence of populist movements. Furthermore, political and geopolitical factors have also contributed to the recent surge in support for 'populist' parties. These various drivers can be further delineated as follows:

¹¹ Ivaldi, G. (2020), *Les populismes aux élections européennes de 2019. Diversité idéologique et performances électorales*, Fondation Jean-Jaurès.

¹² Guriev, S. and Papaioannou, E. (2022) "The Political Economy of Populism" *Journal of Economic Literature*, 60 (3): 753-832. DOI: 10.1257/jel.20201595

First, from an economic point of view, the recent rise of populism has been linked to the economic and financial crisis of 2008¹³, in a context in which the parties on the radical left and the radical right in Europe, have increasingly become the voice of social exasperation and anger. Since then, ‘populist’ parties have benefitted from economic instability, rising inequalities, low social mobility, higher cost of living and increasing impact of climate change. This have also prospered on the fear of globalisation¹⁴ and of a middle class downgrade, which compounded an identity crisis felt by a significant share of public opinion and concerns at the development of a “post-industrial” society. This economic and social dimension is combined with a very strong political and emotional dimension reflected in feelings of fear, unfairness and loss of control. When these fears are not addressed, they risk being transformed into a feeling of powerlessness that can crystallise into anger against government policies and the political system, of which the rise of populism and extremes is a major political expression.

Second, from a cultural point of view, the recent rise of populism even among economically prosperous parts of the population have led scholars to put more emphasis on non-monetary factors.¹⁵ This includes “cultural” fears linked to the perception of a transformation of the traditional “way of life” and of threats to the national identity. This can express itself in hostility towards immigrants, and a return to a xenophobic narrative in some countries, where immigration is portrayed as responsible for economic and social ills such as insecurity. From an external point of view, this can also express itself in a preference for stricter national and EU external border controls in response to the refugee crisis and terrorist attacks.

Third, from a political point of view, the exasperation of many citizens stemming from undelivered promises and scandals affecting personalities in power feeds the “anti-establishment” criticism, which is at the heart of the populist narrative. More fundamentally the return of populism reflects a crisis of representation which comes in at least two different forms. The “system” of traditional representation is struggling to reflect the diversity of old and new cleavages, which are not necessarily reflected clearly at electoral level. In this context, many citizens feel that the traditional alternation of political parties in government, for instance between parties on the left and the right, are not enabling a break from the status quo, deemed untenable. For many of those citizens, ‘populist’ and even extremist parties appear as the only political alternative and as a way to shake up the political system¹⁶. Social networks also favour the diffusion of this contestation, with anonymity unleashing more radical and aggressive discourse, including conspiracy theories.

13 Funke, M., Schularick, M., Trebesch C. (2015), *Going to Extremes: Politics after Financial Crisis, 1870-2014*, Center for Economic Studies (CES) / Institut IFO; see also Eichengreen, B. (2018), *The Populist Temptation: Economic Grievance and Political Reaction in the Modern Era*, Oxford University Press; Rodrik, D. (2018), “Populism and the economics of globalization”, *Journal of International Business Policy* 1(S1); see also Colantone and Stanig (2017) in Rodrik, D., Sabel, F. C. (2019), *Building a Good Jobs Economy. Harvard Kennedy School Faculty Research Working Paper*.

14 Autor, D., Dorn, D., Hanson, G.H., Song, J. (2014), “Trade Adjustment: Worker-Level Evidence”, *The Quarterly Journal of Economics*, 129 (4): 1799-1860; Autor, D., Dorn, D., Hanson, G.H., Majlesi, K. (2016), “Importing Political Polarization? The Electoral Consequences of Rising Trade Exposure”, *NBER Working Papers*, n°2637.

15 Norris, P. and Inglehart, R. (2019), *Cultural Backlash. Trump, Brexit and Authoritarian Populism*, Cambridge University Press.

16 This mechanism clearly applies to “consensus democracies” – Austria, Belgium, Netherlands etc. – that A Lijphart and J.T. Hottinger called “Consociational Democracies”, *Revue internationale de politique comparée*, vol. 4, n°3, 1997, 529-697. But this also applies to majority political systems as in France where the rise of the Rassemblement National can be explained when many citizens say that they feel that they have “tried everything”.

Geopolitical factors play a more ambiguous role in the rise of ‘populist’ parties. On the one hand global instability is an additional source of anxiety that might play in the hands of ‘populists’ and might be exploited by external powers (e.g. Russia) to steer political polarisation and undermine the EU to their advantage. On the other hand, external threats tend to rally support around governments and emphasise the need for a united response. The Russian invasion of Ukraine, which marked the return of war to the continent, is a clear example of this ambiguity. There has been significant public support for the response of the EU and its Member States, which included far-reaching measures such as lethal weapons deliveries, economic and political sanctions, financial and humanitarian support and domestic measures to cushion the increase in gas prices (energy support measures and joint purchase of gas, for example). However, after two years of war, some ‘populist’ parties are seeking to benefit from the war fatigue and erosion of public support for Ukraine by emphasising the costs of the measures that have been taken and questioning whether supporting Ukraine is in the national interest.

Against this backdrop, the next elections to the European Parliament will take place in national, European and international contexts which are fertile ground for ‘populist’ parties. Economic activity has been stagnating for one and a half years while the cost of living has increased, and real wages remain below their pre-pandemic levels¹⁷. In this context, public opinion is expressing very strong pessimism about the socio-economic situation reflecting a feeling of impoverishment and deteriorating living conditions.¹⁸ Moreover, there is a widespread sense of anxiety about the position of Europe in the world (reduced demographic, geopolitical and economic weight, loss of external competitiveness) and its ability to sustain its social model (fiscal constraints amid low growth potential and an ageing population). Policy-specific contextual factors may also benefit ‘populist’ parties, including the backlash against EU climate policies in the agricultural sector and the geopolitical situation in Ukraine and the Middle East.

I ATTITUDES TOWARDS FURTHER EUROPEAN INTEGRATION: “NORMALISATION” OR “RADICALISATION”?

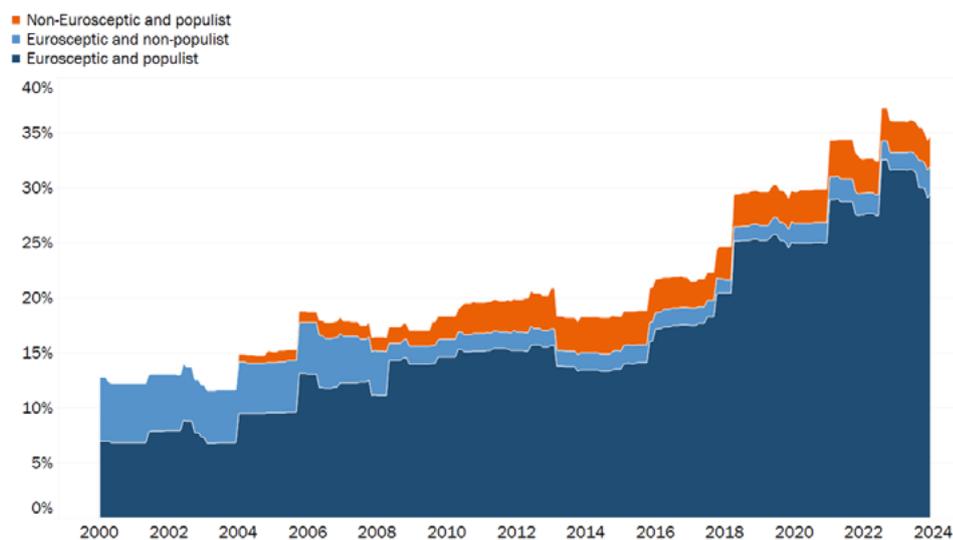
The rise of ‘populist’ parties has coincided with increasing support for Eurosceptic parties across the EU. As illustrated in Figure 4, the two phenomena are largely overlapping as the underlying beliefs and positions have much in common. For example, the anti-establishment sentiments which characterize ‘populist’ parties are also reflected in Eurosceptic views of the EU as an establishment project which is against the interests of the common people. Moreover, there is a strong link between the nationalist/nativist elements in both right-wing populism and Euroscepticism. Indeed, studies have shown that there is a large cluster of parties in Europe that can be defined as both ‘populist’ and Eurosceptic¹⁹. However, it should be noted that there are both ‘populist’ parties which are not Eurosceptic and vice versa.

¹⁷ Cipollone, P. (2024), “The confidence to act: monetary policy and the role of wages during the disinflation process”, Speech at an event organised by the House of the Euro and the Centre for European Reform, 27 March.

¹⁸ This can be seen, for example, in the results of the latest Parlemeter (April 2024), which identifies the fight against poverty and social exclusion (33%) as the top priority issue to be discussed during the electoral campaign for the European elections. More than a third of Europeans (36%) have difficulty paying their bills from time to time or most of the time.

¹⁹ Szczerbiak, A and Taggart, P (2024) “Euroscepticism and anti-establishment parties in Europe”, *Journal of European Integration* - <https://doi.org/10.1080/07036337.2024.2329634>

FIGURE 4. EUROSCEPTICISM AND POPULISM IN THE EU
Share of seats (%) in national parliaments held by Eurosceptic parties



▲ Source: Eurobarometer, ParlGov and own calculations.

▲ Note: Size of parliaments are normalized across countries and weighted for population size as well as adjusted for EU accessions. Eurosceptic parties are taken from The PopuList (2023).

The increasing support for Eurosceptic parties may however not necessarily imply a hardening of party positions or increasingly negative public attitudes on the EU's existence or European integration more broadly. Before discussing the evolution of Euroscepticism, it is useful to first define Euroscepticism and its various form. The academic literature typically differentiates between 'hard' and 'soft' Euroscepticism. The former is generally defined as a principled opposition to the EU and European integration, whereas in the latter there is no principled objection but concerns on one (or a number) of policy areas lead to the expression of qualified opposition to the EU, or there is a sense that the national interest is currently at odds with the EU trajectory.²⁰ A further relevant distinction which follows a similar logic is that between positions on the EU regime as whole versus positions on the EU's policies and functioning.²¹

Party positions on the EU have changed over the last decade as Eurosceptic parties have dialled back their hard Eurosceptic positioning and increasingly sought to promote their policy views at European level instead. Eurosceptic parties tactically moved away from hard forms of rejection of the EU in the aftermath of the Brexit process and ahead of the 2019 European Parliament elections.²² Accordingly, the focus of many parties switched towards a common narrative centred around a "Europe of nations" and previously outspoken demands for their respective countries to leave the EU and/or the euro were dropped.²³ In other words, many

²⁰ Szczerbiak, A. and Taggart, P. (2008) *Opposing Europe? The comparative party politics of Euroscepticism*, Oxford University Press.

²¹ De Vries, C. (2018) *Euroscepticism and the Future of European Integration* (Oxford Academic, 18 Jan. 2018), <https://doi.org/10.1093/oso/9780198793380.001.0001>

²² Chopin, T., Fraccaroli, N., Hernborg, N. and Jamet J-F. (2019), "The Battle for Europe's Future: Political Cleavages and the Balance of Power Ahead of the European Parliament Elections", Jacques Delors Institute Policy Paper, 237, April.

²³ In July 2021, fifteen European nationalist leaders met under the Conference on the Future of Europe – organised by Marine Le Pen – and signed a "Declaration on the Future of Europe" calling for a more sovereignist and nationalist European Union. The leaders represented major parties of both ECR (e.g. Vox, PiS, FdL) and ID (e.g. RN, Lega, FPÖ) as well as Fidesz.

Eurosceptic parties gave priority to a soft Eurosceptic discourse over hard Eurosceptic themes.²⁴ In the 2019-24 legislature, Eurosceptic parties have sought to embody the opposition to the majority formed by the parties supporting the Commission by voicing their criticism towards EU policies. Eurosceptic positioning thus have become more issue-focused, for example in the form of opposition to the European Commission's Green agenda, and less regime critical.²⁵ This suggests a degree of "normalisation" of European political life – at least temporarily – whereby the European debate would no longer be reduced to the divide for or against the European Union and instead primarily focus on the direction of European policies, in a more classical debate between majority and opposition.

Eurosceptic parties now project a Europe in their own image: focused on the fight against poverty for the radical left, on the fight against immigration for the radical right. It is from this perspective that we can understand the "normalisation" of the conservative or even radical right in several European countries, including France and Italy. This indicates the direction the debate could take in the forthcoming European elections. It will no doubt focus more on the direction of European policies and the shortcomings that have been revealed by successive crises. Eurosceptic parties will seek to transpose the traditional divide between opposition and government to the European level.

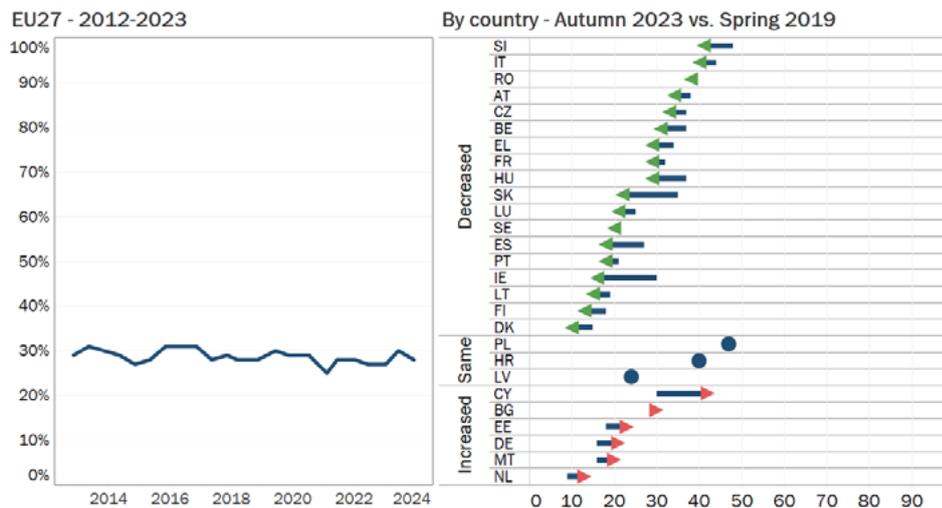
Yet hard Eurosceptic attitudes remain present among the public across Member States (Figure 5) and recent gains in the polls seem to have given some Eurosceptic parties enough confidence to voice more regime critical opinions. Alice Weidel, head of the AfD in Germany, is advocating for a referendum on Germany's EU membership with a view to a Dexit. This may be explained by the attempt to keep support from the most radicalized parts of the AfD's electorate, which also found their expression in anti-vax movements during the pandemic.

²⁴ See Stubenrauch C., Stracca L., Jamet, J-F., Schölermann, H. and Bergbauer, S. (2019), "Global Lessons from Euroscepticism", VoxEU Column, 20 September. On the role of Euroscepticism in the specific case of the European Central Bank, see Fraccaroli, N., Giovannini, A., Jamet, J-F., and Persson, E. (2022), "Ideology and monetary policy. The role of political parties' stances in the European Central Bank's parliamentary hearings", *European Journal of Political Economy*, vol. 74, September 2022, 102207.

²⁵ Thalberg, K., Defard, C., Chopin, T., Barbas, A., Kerneis, K. (2024) "The European Green Deal in the face of rising radical right populism", Policy paper, Jacques Delors Institute; Lockwood, B. and Lockwood, M. (2022) "How do right-wing populist parties influence climate and renewable energy policies? Evidence from OECD countries", *Global Environmental Politics*, 22(3), pp. 12–37; Jahn, D. (2021) "Quick and dirty: How populist parties in government affect greenhouse gas emissions in EU member states", *Journal of European Public Policy*, 28(7), pp. 980–997.

FIGURE 5. HARD EUROSCEPTIC ATTITUDES IN THE EU

Share (%) thinking their country would be better off outside the EU by country



▲ Source: Eurobarometer

▲ Note: The charts show the share (%) answering “Totally agree” and “Tend to agree” to the question “To what extent do you agree or disagree with each of the following statements? (OUR COUNTRY) could better face the future outside the EU (%)”. Latest observations are from Standard Eurobarometer 100 (Autumn 2023).

This ambivalence between “normalisation” and “radicalisation” could reflect a political divide between two types of political forces on the right: on the one hand, a conservative right, which uses the protest/anti-establishment vote to win power but then seeks to position itself as a credible governing party along the lines of Giorgia Meloni in Italy; on the other, a nationalist right (such as the AFD in Germany), which is getting back to a breakaway strategy, particularly concerning the European Union. Between these two positions, the question arises of where to place the Rassemblement National (RN), which has renounced its opposition to the euro, which worried public opinion, but which at the same time defends a legal sovereignty that is incompatible with the EU’s legal construct and could lead to a similar estrangement that led the UK to Brexit. The RN is also allied at European level with parties that advocate a referendum on leaving the EU, and therefore the euro, which reinforces this ambivalence.

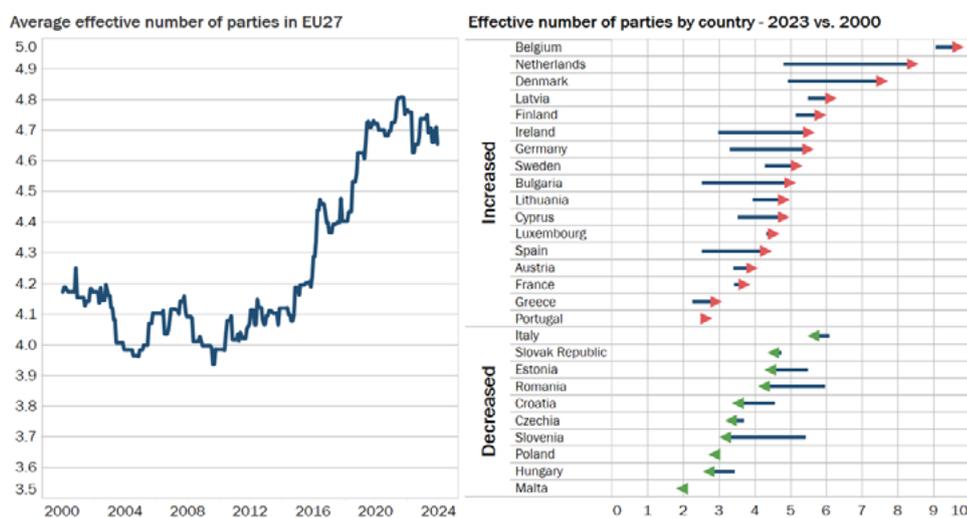
This differentiation also seems to be crystallising around a geopolitical divide, particularly on the two key issues for Europe of relations with Russia on the one hand and the United States on the other. These differences in ideological positioning between the national parties of the conservative and radical right could crystallise in the formation of political groups within the next European Parliament and potentially lead to realignments. While the European Conservatives and Reformists (ECR) have positioned themselves with a clear transatlantic orientation and strong support for Ukraine, the Identity and Democracy (ID) group have taken a more anti-western and pro-Russian stance in the European Parliament during the past legislature.²⁶ These differences between ECR and ID could also condition a possible rapprochement between the European People’s Party (centre-right) and the ECR in promoting conservative policies, while Identity and Democracy (ID) would adopt a more systematic anti-EU positioning.

²⁶ Becker, M. & von Ondarza, N. (2024) “Geostrategy from the Far Right: How Eurosceptic and Far-right Parties Are Positioning Themselves in Foreign and Security Policy”, *SWP Comment 2024/C 08*, 01.03.2024, 8 Seiten doi:10.18449/2024C08.

I THE FRAGMENTATION OF EUROPEAN POLITICS: A QUADRIPARTITION OF THE POLITICAL LANDSCAPE

The rise of ‘populist’ parties has profoundly transformed European politics and led to increasing levels of political fragmentation at both national and EU level. At national level, fragmentation can be measured by the effective number of parties represented in national parliaments (see Figure 6) – which adjusts the number of parties for their relative size in terms of seat share.²⁷ Fragmentation has increased significantly since the early 2000s and in particular over the last decade. Increases in fragmentation have been recorded in 17 Member States since 2000 with the largest increases observed in the Netherlands, Denmark, Ireland, Germany and Bulgaria. The Member States where fragmentation has decreased include mainly eastern and central European countries. This increase in fragmentation can make it more difficult to form majorities and weakens the executive.

FIGURE 6. FRAGMENTATION OF POLITICAL LANDSCAPE IN EU27
Effective number of parties in national parliaments



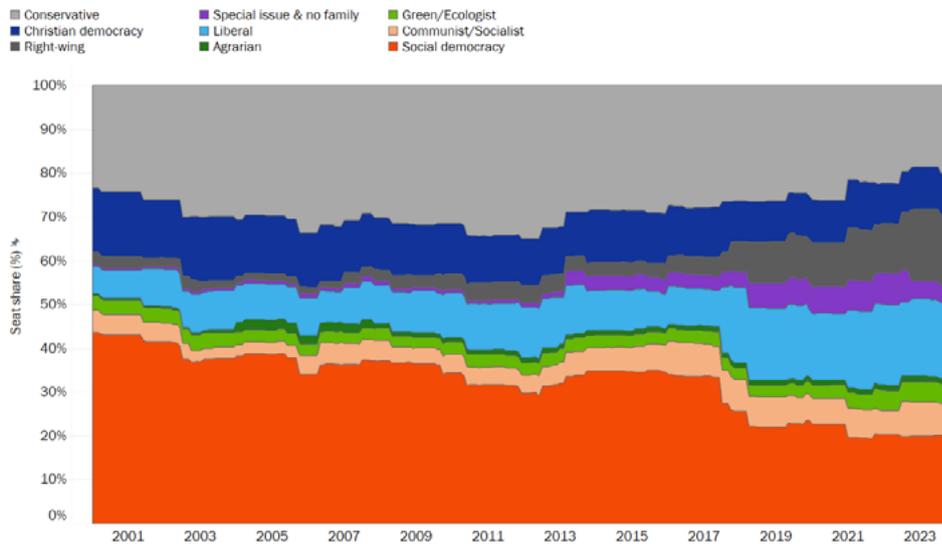
▲ Source: ParlGov and own calculations.

▲ Note: The effective number of parties quantifies the fragmentation or concentration in a party system – it counts the number of parties and weights the count by the parties’ relative strength. It is calculated as one divided by the sum of the squares of the seat shares of all parties in each country. The EU27 average is a simple average not adjusted for accession or population size.

National political landscapes have shifted away from two large left and right blocs to now being characterised by quadripartition. Since 2000, the traditional parties (centre-left and centre-right) have lost seats in the national parliaments, while far-right parties and the liberals have gained seats (Figures 7 and 8). Looking at recent developments, while the centre-left (‘Social democracy’ in the figures’ categorisation) has been stable since 2017 (at around 20%), the centre-right (‘Christian democracy’ and ‘Conservative’) has continued to decline (to 28%). Both remain far from their highest levels (43% and 45% respectively in the early 2000s). The more radical right (‘Right-wing’) and liberal parties are at 16 and 17% respectively.

²⁷ Laakso, Markku; Taagepera, Rein (1979) “‘Effective’ Number of Parties: A Measure with Application to West Europe”. *Comparative Political Studies*. 12 (1): 3–27. doi:10.1177/001041407901200101. ISSN 0010-4140. S2CID 143250203.

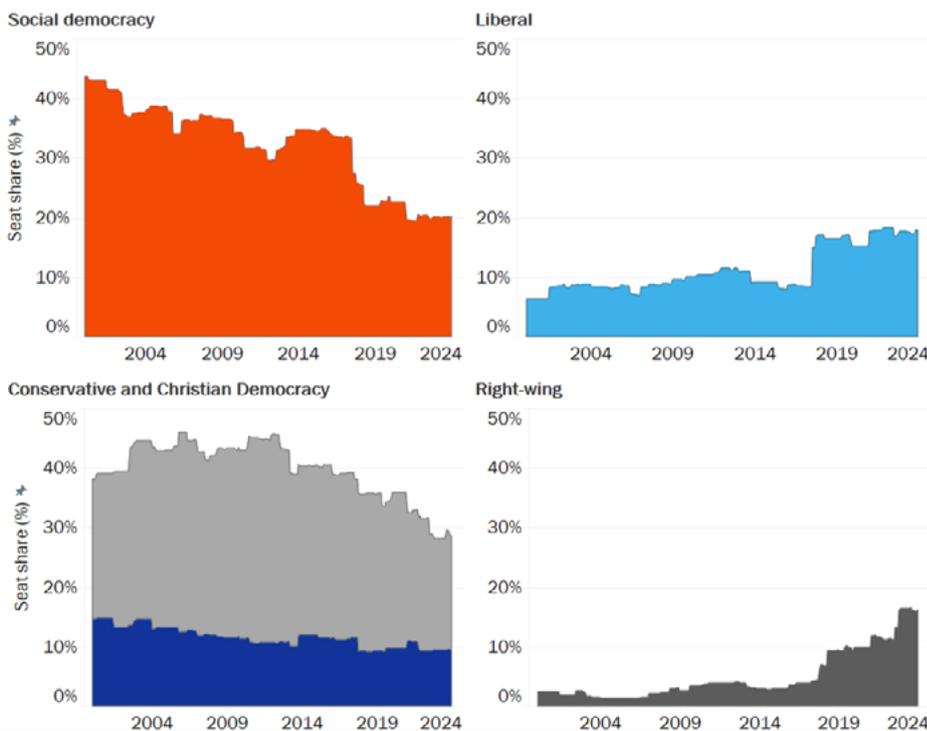
FIGURE 7. POLITICAL LANDSCAPE IN THE EU
Share of seats (%) in national parliaments by party family – EU



▲ Source: ParlGov and own calculations

▲ Note: Size of parliaments are normalized across countries and weighted for population size as well as adjusted for EU accessions. The latest observations are for December 2023. The classification of party families is taken as given from parl.gov.org (see Döring, H., Huber, C. and Manow, P., 2023). The parties are classified into families by their position in an economic (state/market) and a cultural (liberty/authority) left/right dimension. This in turn leads to eight party families: Communist/Socialist, Green/Ecologist, Social democracy, Liberal, Christian democracy, Agrarian, Conservative, Right-wing.

FIGURE 8. POLITICAL LANDSCAPE IN THE EU
Share of seats (%) in national parliaments by party family

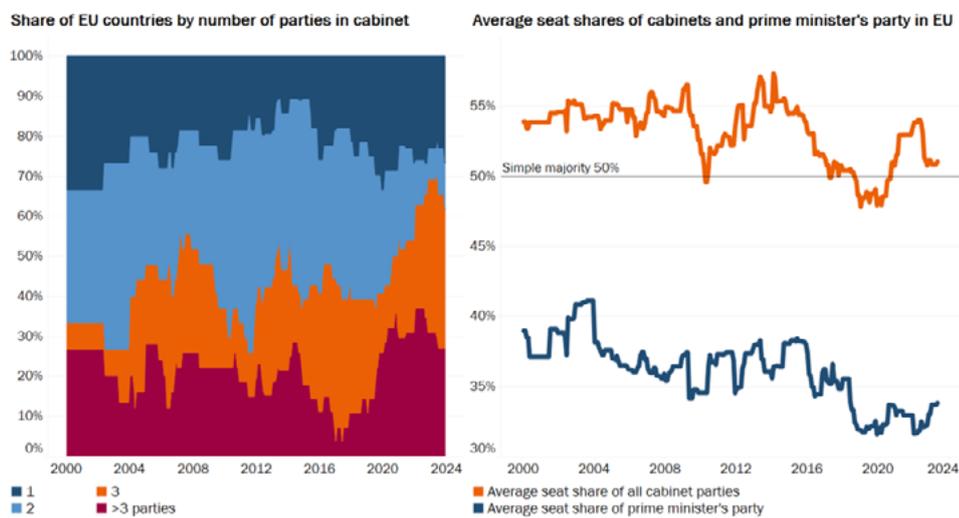


▲ Source: ParlGov and own calculations

▲ Note: Size of parliaments are normalized across countries and weighted for population size as well as adjusted for EU accessions. The latest observations are for December 2023.

The fragmentation of the political landscape at national level risks leading to less cohesive and weaker governments in the EU. As illustrated in Figure 9, the share of cabinets made up of three or more parties has increased from around 30-40% in the early 2000s to around 60% in recent years. At the same time, the average seat share of the prime minister's party has decreased from 35-40% to around 30%. Less cohesive support for sitting governments may lead to less ambitious policies and more infighting over political directions and policy decisions. It may also increase political uncertainty as such governments tend to fall more often if reliant on fragile support in parliaments. At the European level, it also makes it more difficult for coalition governments to agree on coherent policy directions and work with other Member States. This has been shown for example recently with the ideologically fragmented German coalition, which has changed its stance in important EU policy negotiations at a late stage, as well as with the difficult Franco-German cooperation on EU policies.

FIGURE 9. FRAGMENTATION OF GOVERNMENT COMPOSITIONS IN THE EU
Size of cabinets and seat shares in parliaments for cabinet parties

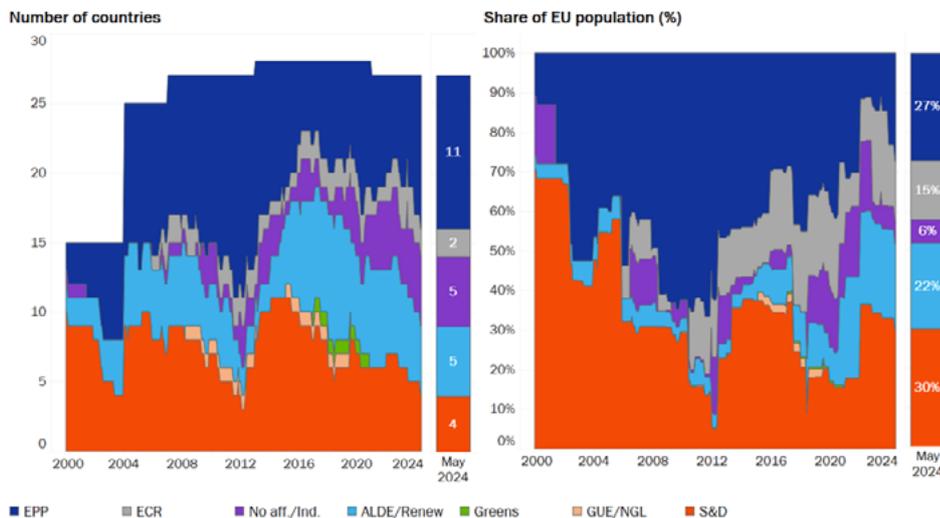


▲ Source: ParlGov and own calculations

▲ Note: Left side panel shows the share of EU countries adjusted for accession. Unity governments with above 90% seat shares have been excluded in the right-side panel.

A similar fragmentation and quadripartition can be observed at European level. The political balance within the European Council has shifted away from the European People's Party and the Social Democrats. In May 2024, 4 heads of States and governments are from the Social Democrats, 5 from Renaissance, 11 from the European People's Party, 2 from the European Conservatives and Reformists, but representing 30%, 22%, 27% and 15% of the EU's population respectively (Figure 10).

FIGURE 10. EUROPEAN COUNCIL
Composition by European party group



▲ Source: ParlGov and own calculations

▲ Note: The charts are adjusted for EU accession and shows the prime minister's European party group belonging. In cases where the head of state representing the country in the European Council is not a prime minister, the country has either been included in the party group that the head of state belongs to or categorised as non-affiliation (No aff.)/independent (Ind.).

II • Participation and salient issues for the 2024 European Parliament elections

I PARTICIPATION ISSUE: INCREASED INTEREST IN ELECTIONS TO THE EUROPEAN PARLIAMENT

European Parliament elections have long been considered second-order to national elections.²⁸ The second-order election model of European Elections has been demonstrated in numerous studies showing that turnout is generally lower, government and big parties underperform, and small and ideologically extreme parties overperform.²⁹ National issues tend to be at the forefront of the election debates and despite the significant role of the European Union in political decision-making in EU countries, European Parliament elections have historically not managed to fully engage the electorate on European issues.

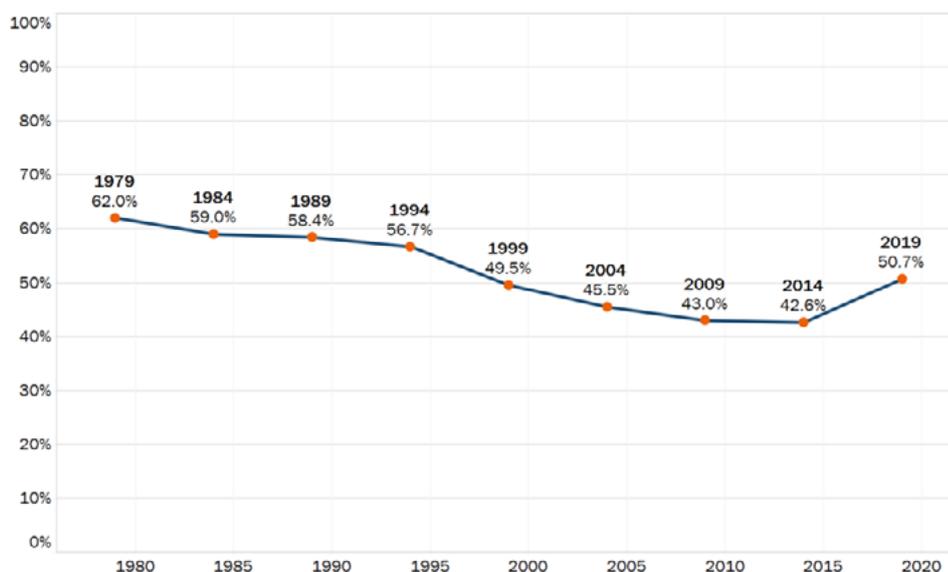
Turnout in European Parliament elections fell consistently from the first elections in 1979 to 2014. This decline has been a significant concern for the legitimacy of the European Parliament and the broader EU political system. Turnout has been persistently low and declining in most EU countries in this period, which has reflected badly on the democratic foundations of EU decision-making. It could be described as “Catch-22” situation for the European Parliament where the lack of legitimacy

²⁸ Reif, K. and Schmitt, H. (1980) “Nine Second-Order National Elections – A Conceptual Framework for the Analysis of European Election Results”. *European Journal of Political Research*, Vol. 8, No. 1, pp. 3–44. Gattermann, K., de Vreese, C. H., & van der Brug, W. (2021) “Introduction to the special issue: No longer second-order? Explaining the European Parliament elections of 2019”. *Politics*, 41(4), 423–432. <https://doi.org/10.1177/02633957211035096>; Ehin, Piret & Talving, Liisa. (2021). Still second-order? European elections in the era of populism, extremism, and Euroscepticism. *Politics*. 41. 10.1177/0263395720986026.

²⁹ Schmitt, H., Sanz, A., Braun, D. and Teperoglou, E. (2020) “It all Happens at Once: Understanding Electoral Behaviour in Second-Order Elections”. *Politics and Governance*, Vol. 8, No. 1, pp. 6–18.

due to low turnout has hampered the willingness to strengthen its role, while the lack of real power of the institution has contributed to lower interest and thereby lower turnout in its elections. However, the European Parliament was given new and increased powers in the Lisbon Treaty which entered into force in 2009, including being fully recognised as a co-legislator and a larger role in the election of the European Commission President. Despite this, the decline in turnout continued and reach an all-time low in the 2014 elections with 42.6% (Figure 11).

FIGURE 11. TURNOUT IN EUROPEAN ELECTIONS
EU 1979-2019



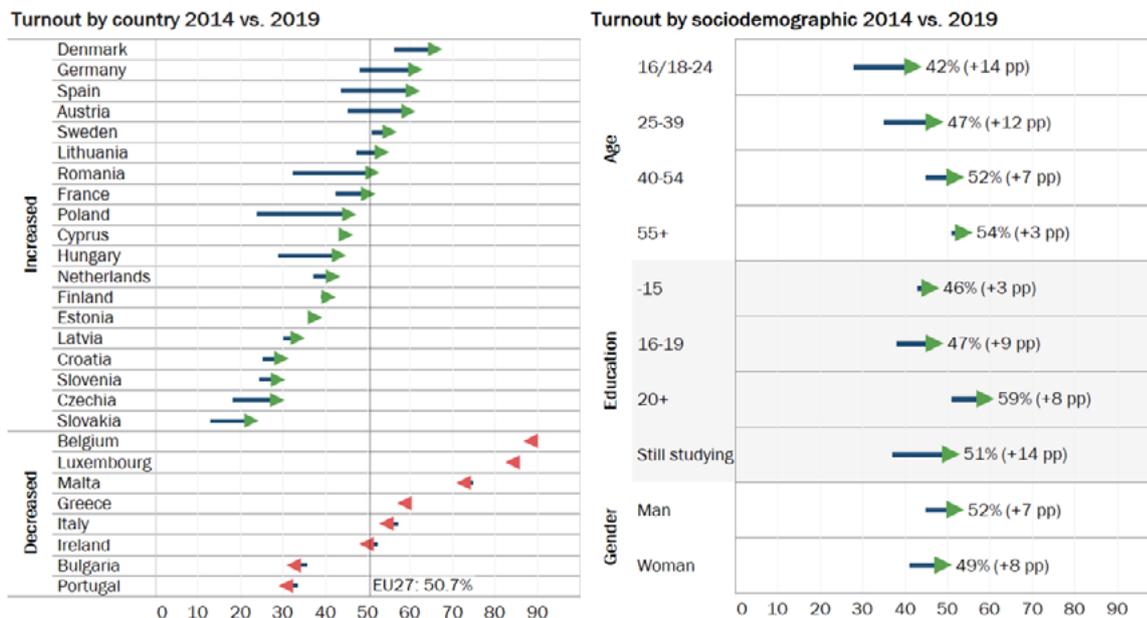
▲ Source: European Parliament

However, the 2019 elections broke the secular decline and showed a renewed interest in EU politics, with a significant increase in turnout by around 8 percentage points. The increase in turnout at the EU-level reflected broader increases at the country-level with increased turnout in 19 of 27 EU countries as shown in Figure 12. Increases were particularly pronounced in Member States that had historically shown low voter participation – such as Slovakia, Czechia, Hungary, Poland and Romania. But turnout also increased significantly in larger Member States with a longer history in the EU, such as Germany (+13pp) and Spain (+14pp). Overall, this development indicated a broader re-engagement with EU politics and renewed interest in the EU. According to a post-election study by the European Parliament,³⁰ while increases were reflected across all sociodemographic groups as shown in Figure 12, the main contributing factor to the upswing was the heightened participation of younger voters. The groups aged 16/18-24 and 25-39 years saw turnout at EU-level increasing by +14pp and +12pp respectively. The mobilisation of these voters has been explained by the salience of issues such as climate change, and the effectiveness of digital campaigns that resonated with the youth and motivated them to vote.³¹

³⁰ European Parliament (2019) “2019 Post-Electoral survey: Have European elections entered a new dimension?”

³¹ European Parliament (2024) “Ten issues to watch in 2024” EPRS.

FIGURE 12. TURNOUT IN EUROPEAN ELECTIONS
2019 vs. 2014 elections



▲ Source: European Parliament and Eurobarometer

▲ Note: The United Kingdom has been excluded as it left the EU shortly after the elections in 2019.

Looking ahead to the 2024 elections, the question is whether this upswing in turnout will continue. A further increase in turnout would increase the legitimacy of the European Parliament and the decision it will take in the next term. Three main reasons can be pointed to which may lead to further increases in turnout in the 2024 elections:

First, as explained in section 1, the European political sphere may have shifted further away from a simple dichotomy of being for or against the EU in recent years, towards more focus on political priorities of the EU. This is, for example, evidenced by the increasing polarisation around the Green Deal, which has gained more and more political attention as the costs of climate change mitigation and adoption have become clearer in recent years. The mobilisation of voters around concrete issues rather than abstract notions around the functioning of the polity may lead to higher turnout.

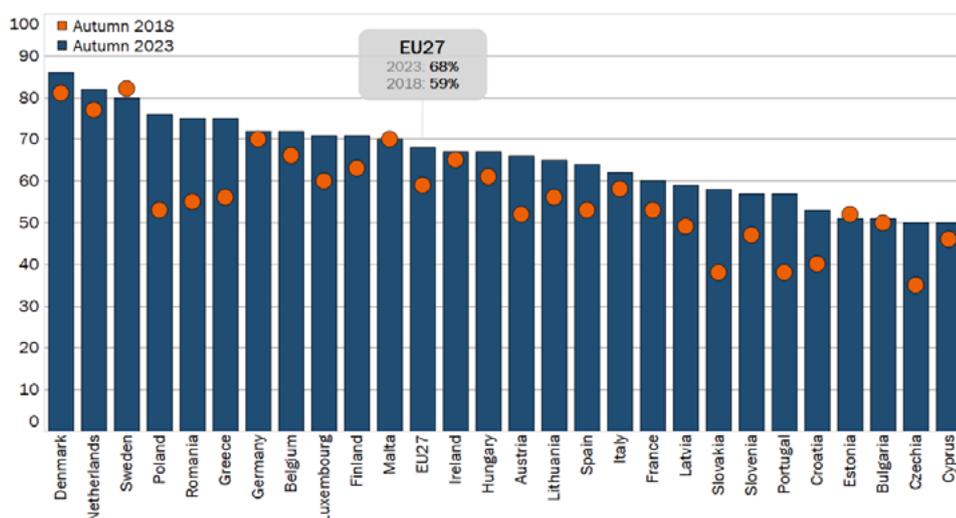
Second, there is a broader understanding of the EU's role in taking important decisions which has an impact on citizen's everyday life. In recent years, the EU has played an increasingly prominent role in addressing recent crises, such as the pandemic and the war in Ukraine, which have been high on the agenda in all Member States. This may increase the motivation of voters to go vote as they feel more that their choice matters and has an impact.

Third, the geopolitical situation has increased the relevance of EU membership and policies, in a more fragmented world where Europe needs to position itself distinctly from other superpowers. The return of war to the continent emphasises the “peace dividend” the EU has delivered by avoiding conflict among its members, while at the same highlighting that the EU needs to be able to protect itself against external threats and therefore strengthen its “hard power”. The prospect of a possible election of Donald Trump and its implications for EU-US relations could further

contribute to the perceived need for Europe to come together and find a new role in the world.

Early indicators of voting intentions and interest in Europe confirm this assessment and point to a further increase in turnout in the upcoming elections. Intentions to vote as captured by a survey in autumn 2023 show that these are significantly higher than those captured by the same survey in autumn 2018 (six months before the 2019 elections). As shown in Figure 13, in autumn 2018, 59% of EU27 respondents indicated a “High importance (7-10)” when asked about how important it was for them to vote in the European elections. In autumn 2023, this number was around 9pp higher, at 68%. This reflects broad increases across Member States with significant increases in Poland, Romania, Greece, Slovakia and Portugal. Increased interest in the EU is also reflected in survey results – the share of respondents who claim that they never look for information about the EU and are not interested have declined from 21% in autumn 2018 (EU28) to 13% in autumn 2023 (EU27).³² It is also notable that four Member States (Belgium, Germany, Malta and Austria) have changed their voting laws to allow 16-year-olds to vote, and Greece will allow 17-year-olds. Nevertheless, while these indicators point to the possibility of higher turnout than in 2019, it should also be noted that the key issue which mobilised voters then – namely climate change – may be less salient at the current juncture and may therefore not mobilise as many younger voters as in 2019.

FIGURE 13. TURNOUT IN EUROPEAN ELECTIONS
Please tell how important or not it is for you personally to vote in the European elections?
Total ‘High importance’ (7-10) – Autumn 2023 vs. Autumn 2018



Source: European Parliament Eurobarometer

I SALIENT CAMPAIGN ISSUES: POLITICAL DEMAND AND VOTER EXPECTATIONS

The focus of the European public has shifted over the past parliamentary term as the EU has gone from crisis to crisis. When the newly elected parliament started in 2019, immigration and terrorism were among the most salient issues among EU citizens, following the 2015 refugee crisis and terrorist attacks by ISIS (Figure 14). However, attention had to some extent already shifted away from these issues: the share of Europeans that identified immigration as one of the two most impor-

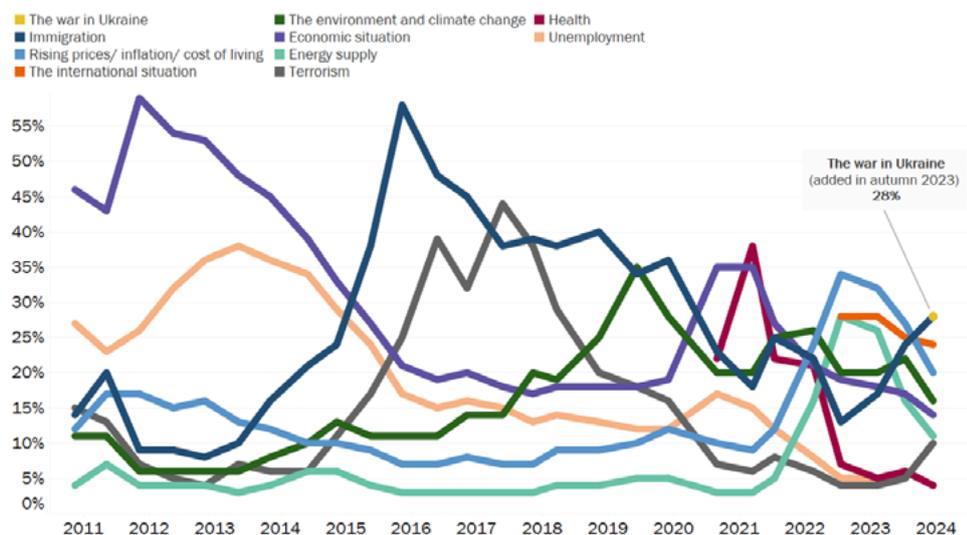
³² Standard Eurobarometer 100 and Standard Eurobarometer 90.

tant issues facing the EU declined from its peak of 58% in 2016 to 34% in 2019, while attention on terrorism dropped from a peak of 44% in 2017 to 18% in 2019. This decline came at the advantage of the environment and climate change, which reached a 10-year high at 35% in 2019. In the beginning of 2020, the focus shifted rapidly towards health issues and the economic situation as the COVID-19 pandemic spread across Europe. However, as the pandemic slowly faded, the attention turned to inflation as the post-pandemic supply chain constraints and subsequent energy price shock in the aftermath of the Ukraine invasion raised the cost of living across the EU.

As the current parliamentary term approaches the end of its term, immigration is again at the top of Europeans' concerns. Unsurprisingly, the war in Ukraine is the other most salient issue alongside migration, followed by the “international situation”, which is likely correlated with the geopolitical uncertainty stemming from the war. Inflation is the fourth most cited issue, but its salience is declining, tracking closely the evolution of the consumer price index.

FIGURE 14. SALIENT ISSUES IN THE EUROPEAN UNION

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



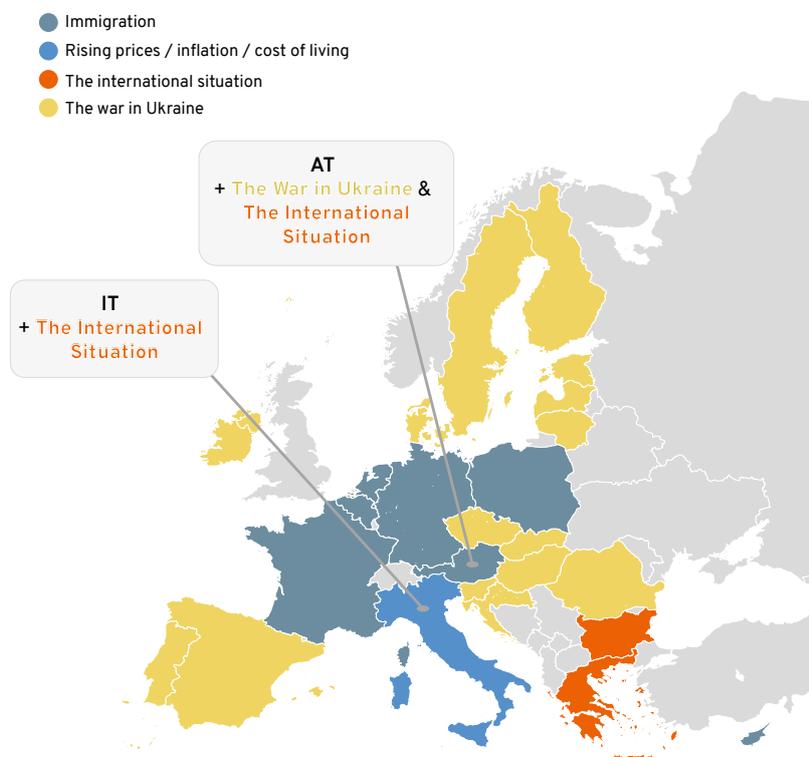
▲ Source: Eurobarometer

▲ Note: Issues with considered less important, including “Crime”, “EU’s Influence in the World”, “Pensions”, “Taxation”, “The educational system” and “The state of Member State’s public finances”, have been excluded. The number of alternative issues varies across Eurobarometer surveys with new issues being introduced and existing ones removed. The latest observations are from Standard Eurobarometer 100 (Autumn 2023) released in December 2023.

While salient issues in many Member States follow the different crises, there are variations depending on the exposure and politicisation of issues (Figure 15). Immigration topped citizens’ concerns in Austria, Belgium, Cyprus, France, Germany, the Netherlands and Poland in autumn 2023. Geopolitical issues (the war in Ukraine and the international situation) are the most salient in all other Member States, except Italy where the cost of living tops the list of concerns.

FIGURE 15. SALIENT ISSUES IN THE EUROPEAN UNION

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



▲ Source: Eurobarometer

▲ Note: In Italy and Austria there are more than one issue selected by the same share of respondents. The observations are from Standard Eurobarometer 100 (Autumn 2023) released in December 2023.

– Immigration

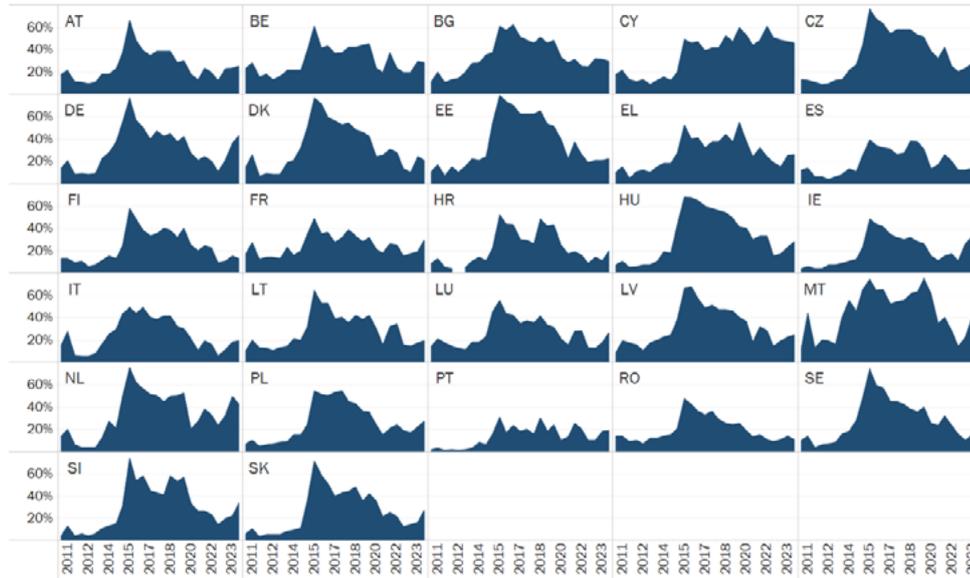
The issue of immigration has gained traction in most European countries, suggesting that its recent prominence is not driven by an idiosyncratic shock. The salience of migration has grown particularly rapidly in Germany, the Netherlands, Hungary, and Czech Republic (Figure 16). Previous work highlighted that the salience of migration in EU public opinion is strongly correlated with migration flows (while public preferences on migration are correlated with migration stocks).³³ In line with this interpretation, Eurostat data show that in 2022 the number of immigrants from non-EU countries that entered the EU increased by 117% compared to the previous year.³⁴

33 Hatton (2017), “Public Opinion on Immigration in Europe: Preference versus Salience”, *IZA Discussion Paper Series*, No. 10838, IZA - Institute of Labor Economics. <https://docs.iza.org/dp10838.pdf>.

34 Eurostat (2024), “Migration and migrant population statistics”, *Statistics Explained*.

FIGURE 16. SALIENT ISSUES IN THE EUROPEAN UNION

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



▲ Source: Eurobarometer

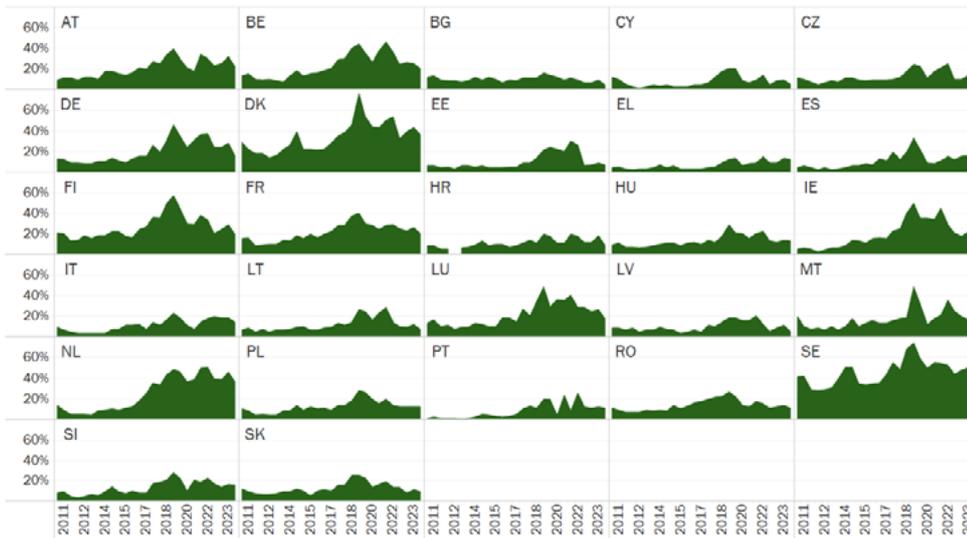
▲ Note: The latest observations are from Standard Eurobarometer 100 (Autumn 2023) released in December 2023.

— Climate change

The issue of climate change shows a heterogeneous pattern across EU countries, with high values mostly concentrated among Nordic EU members (Figure 17). Climate change was felt the most by citizens in Denmark, Sweden, Finland, Belgium, Ireland, Austria, the Netherlands, and France. The attention to this issue is relatively lower in Mediterranean and East European countries (except in Lithuania), where the salience hovers below 20 percentage points. Climate change lost salience across all the EU in 2020, when the Covid crisis diverted the attention to health-related issues and to the economic situation. The most recent data points show that the salience of the environment and climate change is in decline.

FIGURE 17. SALIENT ISSUES IN THE EUROPEAN UNION

What do you think are the two most important issues facing EU at the moment? The environment and climate change



▲ Source: Eurobarometer

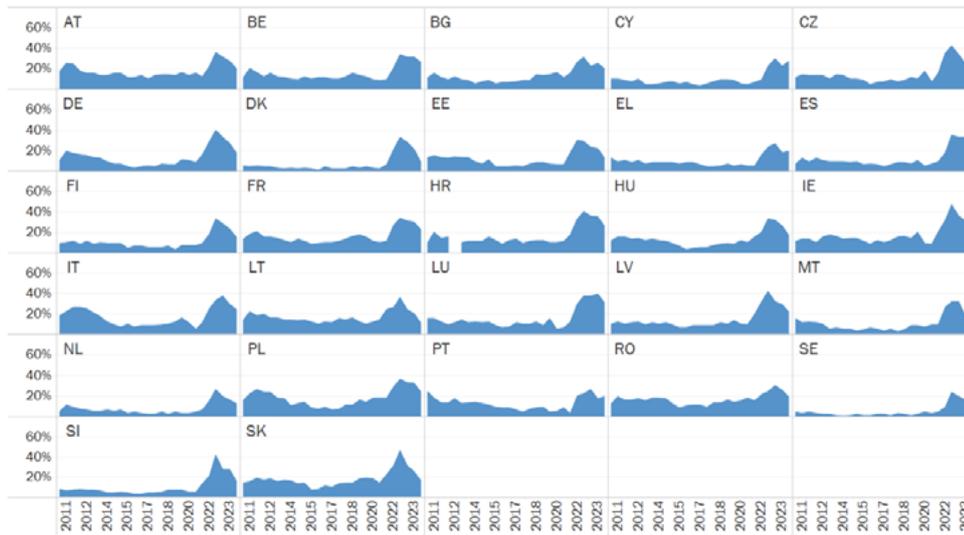
▲ Note: The latest observations are from Standard Eurobarometer 100 (Autumn 2023) released in December 2023.

— Inflation

Unsurprisingly, the salience of inflation has followed closely the changes in the consumer price index and is thus now receding as inflation declines following the normalisation in energy prices. Inflation was a dormant issue that did not occupy a prominent space in the public discourse until the onset of the price surge in the second half of 2021 as the post-pandemic supply chain constraints hit and prices of gas imported from Russia started to spiral upwards. Across Member States, citizens expressed notable concerns around inflationary pressures that are reflected in the increased importance of this issue in Eurobarometer data. The countries with the higher share of respondents pointing at inflation as one of the two most important issues were Ireland and Germany in autumn 2022. As inflation came down in 2023 and 2024, its salience decreased substantially (Figure 18). However, it should be noted that the salience of inflation remains higher than pre-2021 levels.

FIGURE 18. SALIENT ISSUES IN THE EUROPEAN UNION

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



▲ Source: Eurobarometer

▲ Note: The latest observations are from Standard Eurobarometer 100 (Autumn 2023) released in December 2023.

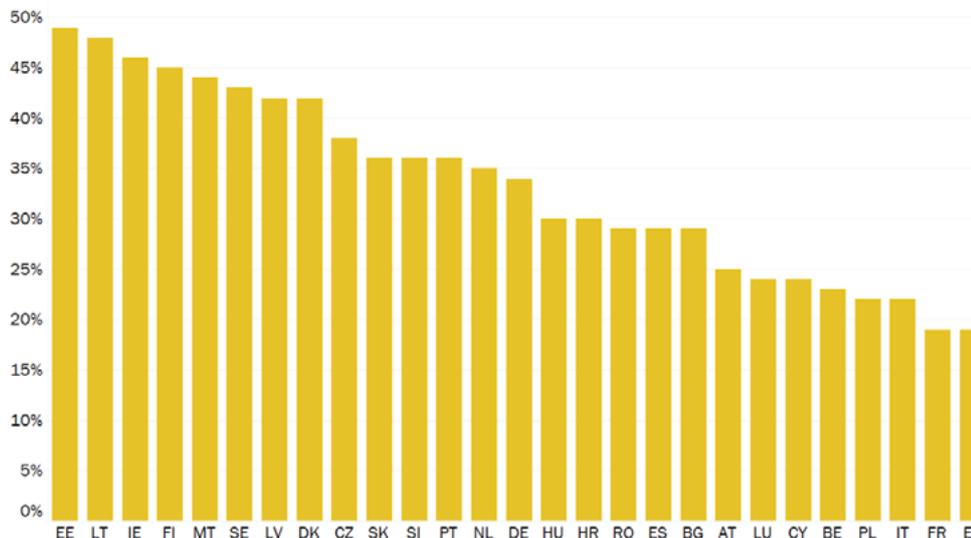
— Ukraine and enlargement

The salience of the war in Ukraine is overall high among EU citizens, with notable differences across EU countries (Figure 19). Unsurprisingly, the highest share of citizens that attach relevance to these issues is found in two Baltic States bordering with Russia: Estonia (49%) and Lithuania (48%). Estonia is the country that committed the highest bilateral aid as a share of its GDP in the EU (3.55%), followed by Denmark (2.41%) and Lithuania (1.54%).³⁵ Greece, France, and Italy are the countries displaying the lowest share of citizens identifying the Ukraine war as prominent. The most surprising result is Poland, which reports the fourth lowest score despite its geopolitical involvement in the war and geographic proximity to both Russia and Ukraine (Poland is the only EU country that shares a border with both Ukraine and Russia, due to the Kaliningrad Oblast exclave). In Poland, the two most prominent issues are instead immigration (27%) and inflation (24%), which overshadowed the public attention to Ukraine.

35 Source: Statista

FIGURE 19. SALIENT ISSUES IN THE EUROPEAN UNION

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



▲ Source: Eurobarometer

▲ Note: The latest observations are from Standard Eurobarometer 100 (Autumn 2023) released in December 2023.

III • What political balance of power after the 2024 European Parliament elections? Projections and impact for European policy in the next five years

I A LOOK BACK AT THE 2019-2024 LEGISLATURE

The 2019-2024 legislature reflected two major forces: the political balance in European institutions and intruding events.

Politically, the 2019-2024 legislature was characterised by the need for key centrist forces – centre-right, liberals and centre-left – to cooperate as none of them could form majorities in the European Parliament without at least one of the others, while a coalition of the EPP and S&D was no longer sufficient.³⁶ In the European Parliament, the liberals assumed a central position as they could decide – at least in principle – to either form a majority with left-wing parties or with the right. By limiting the power of the main party in parliament (the EPP), this ensured a balance among the groups supporting the Commission, making it easier for the Commission to pass legislation. Indeed, Renew was the political group most frequently part of winning majorities in the European Parliament during 2019-2024 legislature (92% of the votes compared to 86% for the S&D and 78% for the EPP).³⁷ In turn, the Commission’s political agenda at the onset of the legislature combined political priorities of the S&D (“an economy that works for people”, a “European green deal”), Renew (“Fit for the digital age”, “A new push for European democracy”) and

³⁶ Majorities could thus in principle either be formed by combining votes of the EPP, S&D and Renew (majority supporting the Commission); or Renew, EPP, ECR and ID (right-leaning coalition); or Renew, S&D, Greens and The Left (left-leaning coalition).

³⁷ Source: EU Matrix.

the EPP (“A stronger Europe in the world”, “Promoting the European way of life”).³⁸ Each political group thus had an incentive to support the overall agenda to ensure that progress would be made on their own priorities. This incentive weakened however as the end of the legislature approached, and this could be seen in parts of the EPP and the liberals refusing to support elements of the green agenda in recent months.

The 2019-24 term was defined by a series of crisis – most notably the COVID-19 pandemic, Russia’s invasion of Ukraine and the subsequent energy crisis. A defining element for the Commission – and a key test for the political forces supporting it – was therefore the response to these crises. Each of them was characterised by a relatively slow initial reaction³⁹, followed by determined measures of unprecedented scale. This reflected the unpreparedness of the EU for such crises. In many cases, the Commission did not have readily available instruments at its disposal and had to create them from scratch. This required time and political capital. And in spite of the Commission’s determination to respond strongly, it exposed EU fragilities. This in turn may help explain why the political coalition supporting the Commission in the 2019-24 legislature is likely to lose seats in the 2024 European Parliament elections.

I WHAT PROJECTIONS IN TERMS OF POLITICAL AND PARTISAN BALANCE OF POWER AFTER JUNE 2024?

Current projections for the next European Parliament (see Figure 1 in introduction) and the evolution of the composition of the European Council suggest the following balance of power in the upcoming legislature:

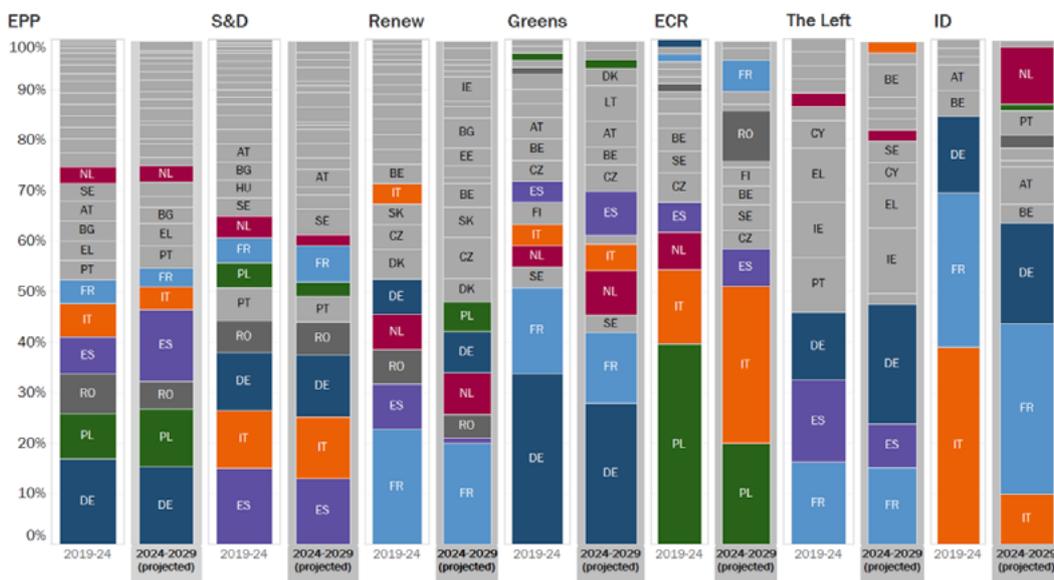
- The centre-right, centre-left and liberals would remain able to command a majority in both the European Parliament and the European Council, but it will be weaker in the next European Parliament than in the current one. This will create risks that majorities are not reached in the European Parliament on appointments (including for the new Commission) or files that are controversial within the EPP, S&D and Renew.
- The balance of the European Parliament would shift to the right. A left-leaning coalition (Renew, S&D, Greens and the Left) would no longer be possible, while right-leaning majorities would remain a possibility albeit hard to organize due to the more extreme elements on the far-right. This could lead the centre-right (EPP) to seek stronger influence and aim to shift the political orientation to the right, creating tensions with the centre-left (S&D) and parts of the liberals (Renew).
- More uncertainty and potentially instability in the European Parliament could lead the new Commission to seek broader support than the current coalition, potentially reducing policy ambition (lower common denominator) and focusing on issues that can command broader majorities (for instance policies related to the external environment – e.g. economic competitiveness and external security).

38 The European Council defined similar priorities as part of the Strategic Agenda 2019-24 adopted in June 2019: “Building a climate neutral, green, fair and social Europe”, “Developing a strong and vibrant economic base”, “Promoting European interests and values on the global stage”, and “Protecting citizens and freedoms”.

39 In view of the disunited initial response to the pandemic, Jacques Delors warned end-March 2020 that “The climate that seems to hang over the heads of state and government and the lack of European solidarity pose a mortal danger to the European Union”. In the case of Russia’s war on Ukraine the response came quickly after the outbreak of the war, but in the runup to the invasion, Russia’s invasion of Ukraine was seen as unlikely and the increase in the prices of Russia’s gas exports to the EU from the Summer of 2021 was met with limited reaction initially.

- A key decision will be the choice of political group by Fratelli d'Italia. If Fratelli d'Italia remains in ECR (rather than joining the EPP), the ECR may get more influential through its representation in both the European Council and the European Parliament. In the 2019-2024 legislature, EPP and ECR MEPs already voted in a similar way in some areas such as internal market and foreign policy. ECR may however keep an ad-hoc approach rather than stronger alignment with the EPP if it prefers to emphasise a role in opposition to centrist parties and along eurosceptic lines on some appointments and legislative files.
- The voice of the nationalist right will be stronger. ID could become the third political group in size, with implications for the allocation of speaking time and positions such as Committee chairs.
- Overall, the representation of eurosceptic political groups would increase, although the share of clearly pro-EU political groups is projected to remain above 60%.
- There will be changes in the geographical composition of political groups (Figure 20), that could influence their orientation. For instance, the EPP is likely to get a larger share of its seats from the Spanish and Polish delegations. ECR would get a much higher share of its seats from Italy as Fratelli D'Italia wins seats, while ID would get a much smaller share as Lega Nord loses seats. The Left would see a larger contribution from Germany.

FIGURE 20.
GEOGRAPHIC COMPOSITION OF POLITICAL GROUPS IN THE EUROPEAN PARLIAMENT
 Projected changes in political group composition by country



▲ Source: European Parliament and Europe Elects
 ▲ Note: Projected seats for 2024-2029 are based on Europe Elects projections per political party from March 2024. Non-inscrits have been excluded.

A key test of the political balance in the next term will be the appointment of the President of the European Commission. The frontrunner is the incumbent, Ursula Von der Leyen, who secured the backing of the EPP as lead candidate (*Spitzenkan-*

didaten). The main difficulty for her – if she is nominated by the European Council⁴⁰ – will be to define an agenda that secures the support of enough other political groups' MEPs in a secret ballot. Previous experience shows that it is no easy task. In 2019, Ursula Von der Leyen had secured a majority of only 9 votes for her appointment.

I WHAT EUROPEAN POLICY FOR THE NEXT FIVE YEARS?

Independent of the political balance after the European elections, European policy will have to respond to several pressing issues that EU institutions will be confronted with in the next legislature.

On the economic front, the competitiveness of the EU and its ability to strengthen domestic sources of growth have emerged as key questions against the background of rising risks of trade fragmentation and massive subsidies by the US and China to their domestic companies in a context of geopolitical and technological competition. The reports of Mario Draghi on European competitiveness and of Enrico Letta on the Single Market will serve as important inputs into the political debate.⁴¹ The Letta Report already points to the need to strengthen the Single Market in key network industries such as digital networks and services, energy and transportation so that European companies can operate on a pan-European scale and become more competitive globally. Some questions – such as the financing of the necessary public investments if the EU is to live up to its priorities, especially after Next Generation EU comes to an end – are bound to be controversial. This could lead to an increased focus on sources of private finance – for instance in the form of a more ambitious agenda to advance the integration and depths of European capital markets, of which the European Council has recently seized itself. It may also lead to another effort to review existing EU legislation to the extent that it is seen as hampering European competitiveness and to a more assertive policy response to competition distortions induced by Chinese and US industrial and trade policies.

Another key issue for the next legislature will be the EU's strategic positioning in a world where it appears comparatively less determined and united in asserting its interests and values than other major geopolitical powers such as the US, China or Russia. If Trump wins the US presidential election, the EU may find itself isolated, for instance when it comes to supporting Ukraine, organising its own security and promoting its values on the global stage. The next legislature is thus likely to be confronted with difficult questions on the EU's defence, foreign policy and strategic autonomy.

The above suggests a policy agenda that is largely determined by external challenges. This may also affect other priorities that were already present in the previous legislature's agenda, such as the green and digital transitions. The recently leaked outline for the European Council Strategic Agenda 2024-29 is consistent with this expectation.⁴² With the green transition now facing political backlash, it may now be increasingly approached from a competitiveness and strategic autonomy angle. Competition from the US and China on green techs

⁴⁰ It is notable that the European Council selects its nominee for European Commission President by qualified majority, rather than unanimity. But it is usually part of a package deal on key appointments, which requires broad backing by European Council members.

⁴¹ The report of Enrico Letta has been published (Letta, E. (2024), "[Much More than a Market – Speed, Security, Solidarity: Empowering the Single Market to deliver a sustainable future and prosperity for all EU Citizens](#)", *High-level report on the future of the Single Market*).

⁴² The adoption of the European Council's strategic agenda is foreseen in June 2024.

and the risks from external dependencies on fossil fuels mean the EU will need to continue its green drive but this will likely now be discussed with a stronger economic than environmental angle, impacting the orientation of green policies.

At the same time, the results of the upcoming European parliament elections will play an important role in how easy it will be to form majorities in the next term. Strong gains by far-right political groups would have two main consequences. First, by weakening the majority that supported the von der Leyen Commission, they may increase the need to seek additional votes on various pieces of legislation. Depending on where these votes come from (in particular whether they come from the Greens or the ECR), this would impact the political orientation of the Commission. Second, they may influence the parties of the majority if political groups such as the EPP but also Renew feel the need to get closer to the position of right-wing parties to avoid losing further votes to them. This could impact decisions in areas such as climate policies – with more focus on the costs of climate action than climate inaction –, the rule of law and civil liberties, or migration. And it could constrain ambition on further European integration.⁴³

Increased political fragmentation will widen the gap between the magnitude of the challenges and the ability to agree on ambitious responses. In this respect, a focus on external challenges may make cross-party compromises easier. At the same time, a difficult economic and geopolitical environment will trigger increased request for support or protection of domestic constituencies – as we saw recently with farmers’ protests which triggered calls to reform the common agricultural policy. This may force the next Commission to spend much of its political capital in pork barrel politics, which political fragmentation is likely to worsen.

While political fragmentation is likely to make further integration difficult and could worsen the risk that any further enlargement would make the EU’s even less able to agree on ambitious European policies, it remains to be seen to what extent the next Commission will be able to leverage on intruding events to rally support for bold moves, as it was able to do in the 2019-2024 legislature. Progress may be achieved reactively rather than proactively, under the pressure of events, compounding the perception of an EU in crisis mode rather than confident about its vision of the future. This would continue to offer fertile ground for discontent and a further rise of support for ‘populist’ parties. A key priority for the next Commission and EU leaders will thus be to outline a clear and engaging vision for Europe’s future and identity in an unstable world, allowing to create a sense of togetherness that helps to overcome internal political fragmentation. External challenges may offer the occasion for such a “rally ‘round the European flag” moment if EU leaders are able to seize it.

The choice of personalities to lead EU institutions and how they exercise their roles will matter in this respect. In particular, next to the role of president of the European Commission, which has seen increased politicisation and is focused on leading the legislative process, the role of the European Council President could evolve from that of a facilitator of the exchanges of Heads of States and Governments to that of a guardian of the union and of the EU’s objectives and values, similar to the role played by the President of the Republic in Germany or Italy. The evolution of the European Council President function in this direction would be facilitated by entrusting the role to a personality that is widely respected, within Europe and globally, and whose voice and vision would be listened to. This could also facilitate a better differentiation with the role of the European Commission President

⁴³ See L. Scazzieri (2024), “[The European Parliament elections: A sharp right turn?](#)”, Centre for European Reform.

(which is more akin to leading a government), avoiding competition and overlaps that damage the EU's reputation on the world stage. And it would provide a welcome compass.

• Conclusion

In this paper, we have looked at the political dynamics ahead of the European Parliament elections and their political and institutional implications.

Our findings point to a more fragmented political landscape that could further complicate decision-making and weaken EU institutions, even as the EU is confronted with major challenges. If the European Parliament elections confirm this outlook by increasing the share of far-right political groups and weakening the centrist majority, the Union will need to focus its political capital on a smaller number of strategic priorities that can receive cross-party support and address issues that are salient in public opinion – with an emphasis on strengthening the EU against external challenges both geopolitically and economically.

While current trends and projections point to the continued rise of far-right 'populist' parties in Europe, these political dynamics are not univocal as regards their implications for European integration. On the one hand, they point to increased strength of eurosceptic parties. On the other hand, they also suggest a normalisation of European politics as these parties increasingly seek to promote their policy views at European level instead of simply focusing on advocating a repatriation of powers to the national level. Moreover, participation in the European Parliament elections is likely to rise further, in line with the expectations that against the prevailing global challenges – and as seen in recent crises such as the pandemic, the energy crisis, and Russia's war on Ukraine – the European level may increasingly be the relevant level for key decisions.

This in turn points to the risk that an increasing gap could open up between expectations from European citizens for important decisions at EU level and the ability to find a political majority for determined action. This may require an evolution in the practice of key political roles in the EU. While the role of President of the Commission will increasingly have to focus on building cross-party support for policy initiatives, a European Council President that is widely respected within Europe and globally would allow to provide a longer term, strategic vision and act as a guardian of the union.

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This project is funded by the European Commission's Citizens, Equality, Rights and Values Programme (CERV) under project number 101104850 – IJD 2024.