

DENTONS GLOBAL ADVISORS

TEN EARLY PREDICTIONS FOR THE 2024 EUROPEAN ELECTIONS

01 March 2023



1. High turnover of MEPs continues – as in 2019 likely to be well over 50%

2. EPP set to remain largest group despite losses

3. EPP and Socialists domination continues to fall

4. Pro-EU majority reduced and harder to control

5. Extremes of Left and Right will be main winners in terms of numbers – but still unlikely to translate into influence

6. Greens the big losers

7. Political parties still to set timetable for choosing Spitzenkandidat and adopting manifestos

8. Von der Leyen not assured of 2nd term

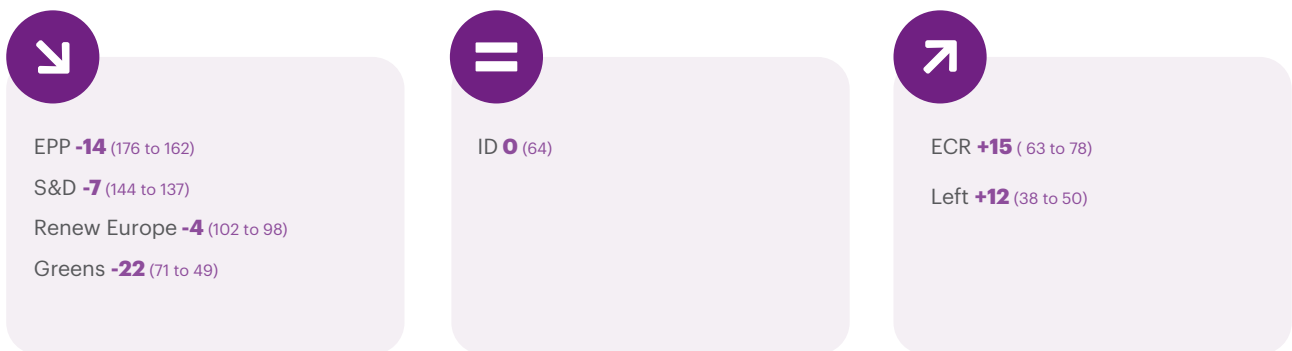
9. Polish and Spanish elections could shift the balance in European Council

10. Unfinished business – many proposals risk lapsing

Predictions

We are still over 1 year away from the elections and we don't even have an election date, so any predictions are very much a best guess. There are no real EU opinion polls, just a collection of national ones, which usually differ between national and European elections. On that basis, taking the average from 3 separate sources (Politico, Europe Elects and EU Matrix) delivers the results below.

While the trends in all 3 sources tend to be in the same direction, there are some noticeable differences ie Politico has Renew losing 13 seats while EU Matrix has a 3 seat gain; Politico again foresees a bigger Green drop of 29 compared to Europe Elects on -15.



1. High turnover of MEPs continues – as in 2019 likely to be well over 50%

- Recent EP elections have seen over half of sitting MEPs replaced, due to a combination of retirement, dropping down the party list and traditional parties losing seats to new parties. The significance is that returning MEPs will take key committee positions such as Chairman, coordinator and rapporteur while newcomers take time to settle in and choose the area they wish to focus on.
- Turnout fell in every election from 1979 to 2014, so the slight improvement in 2019 to 51% was greeted with huge fanfare. The 2024 elections risk a drop again thanks to the fall out from the corruption scandal which could lead to increased rates of absenteeism as voters lose trust in the EU institutions.

2. EPP set to remain largest group despite losses

- The EPP looks set to maintain its record since 1999 of being the largest political group. While they are predicted to lose around 15 seats they will still be 20-30 seats larger than the Socialists. This will put them in pole position to push forward their Spitzenkandidat as candidate for Commission president

and for their manifesto to influence the Commission's 5 year programme.

3. EPP and Socialists domination continues to fall

- One of the headlines of the 2019 elections was that the combined EPP/Socialist numbers fell below 50% for the first time, down to 45%. That looks set to fall again, closer to 42%, which will further reduce their tradition of sharing out top jobs between them (ie EP President). It will make them both further dependent on other groups to find majorities.

4. Pro-EU majority reduced and harder to control

- The von der Leyen Commission was approved thanks to a EPP, S&D, Renew majority that shared out the top jobs between them and helped draft the Commission's work programme. That majority looks set to fall in numbers from 422 (60%) to 400 (56%) but still looks like the most workable coalition. Neither a progressive left coalition (S&D/Renew/Greens/Left 337=48%) or a right-wing coalition (EPP/ECR/Renew 354=49%) would reach a workable majority.
- The smaller EPP/SD/Renew majority however will make it

harder to control and keep party discipline, with the risk that minorities in any of the groups could swing a vote

- Renew are due to still hover around the 100 mark and may bargain for greater influence given their losses will be minimal compared to EPP and S&D. They will also continue to punch above their weight in the European Council.

5. Extremes of Left and Right will be main winners in terms of numbers – but still unlikely to translate into influence

- ECR are predicted to be the biggest winners thanks in particular to extra votes from Italy (Fdi) and Spain (VOX), making them the 4th largest group.
- Talk of closer ties between EPP and ECR will only increase if Partido Popular win the Spanish election with VOX support. Following the coalitions in Italy and Sweden and an ECR PM in Czechia, the ECR will look to gain more influence. The EPP seem particularly keen to woo Meloni and on issues like migration and security, EPP seem closer to ECR than other groups.
- The cordon sanitaire put around the far-right in this parliament was targeted at ID but took in the Polish PiS members in ECR who were denied top positions (ie Chairman of Employment Committee). Other ECR parties fared better, with an ECR Vice President (Roberts Zile from Latvia) and well respected Chair of Budgets Committee Johan van Overtveldt (Belgian). With a predicted increase of 15 seats they will be looking for more.
- The Left are predicted to be the other big winners, gaining 12 seats and passing the 50 MEP mark, mainly thanks to support for Mélenchon in France and others disillusioned with the Socialists. While they may gain a more influential committee chair, their impact on legislation is likely to remain minimal.
- The far-right ID are predicted to remain about the same size and any hopes of a wider nationalist, eurosceptic grouping look as unlikely as previous attempts over the past 5 years, particularly given their pro-Russian bias. They will no doubt try and take advantage of the Qatar corruption scandal to attack Brussels for hypocrisy over rule of law.

6. Greens the big losers

The Greens are predicted to lose 22 seats, with some polls putting this as high as 29 seats. This will seriously diminish their ability to influence policy and have a Chair of any main legislative committee. Their chances of being part of the pro-European majority along with EPP, S&D and Renew is diminished and they may decide to take a more radical line in order to win back lost support.

7. Political parties still to set timetable for choosing Spitzenkandidat and adopting manifestos

- All the mainstream groups have come out again in favour of pursuing the Spitzenkandidat/leading candidate process, which will ensure another confrontation with EU leaders keen to maintain the right to nominate the Commission President.
- While the main political groups have set in motion the internal discussions building towards the elections, none of them have set dates yet for party Congresses to elect a Spitzenkandidat or adopt a manifesto.
- The 2019 Manifestos came out at different stages – early for ALDE and Greens (November 2018); later for S&D (Feb 2019); EPP and ECR (April 2019)
- The EPP have appointed Spanish VP Esteban Gonzalez Pons to lead the so-called Crete process which will lead to a party congress by the end of the year. It's not clear if they will follow the procedure from 2019 of first electing their leading candidate (Weber beat Stubb in November 2018) and then allowing him to add his imprint on the final manifesto. Weber's 12 point plan from 2019 was a much more targeted list of promises compared to the usual rather vague party manifestos and it had a direct influence on Von der Leyen's 5 year programme.

8. Von der Leyen not assured of 2nd term

If Von der Leyen decides to push for a 2nd term, she will need to pass a number of hurdles to get re-elected.

- She will need the backing of the German government now run by her political opponents. To complicate matters, the coalition agreement gives the Commissioner post to the Greens if she does not stay as president.
- She'll also need the backing of her EPP party and there is some frustration (including her own CDU party) at her Green Deal putting too much pressure on business and farmers (see EPP attempts to weaken draft laws on pesticides, nature restoration, due diligence, eco design) + delays on REACH and Green Claims. The majority of EPP even voted against the joint EP resolution welcoming the new Green Industrial plan.
- Weber has also mentioned EP President Roberta Metsola as a potential candidate, who would have the support of smaller member states and is considered more conservative. However, her lack of government experience risks being her downfall, as it was for Weber in 2019.
- Macron will also have a big say – what will he hope to get out of the share out top jobs?

S&D Spitzenkandidat : It's still too early for names to circulate although Frans **Timmermans**, lead candidate in 2019, will surely be in the mix. A **Sanchez** defeat in Spain in December could see him available to take over the European Council which likes to give the role to former PMs.

Renew: Thierry **Breton** has been talked of as a possible Renew candidate but with a French woman (Christine Lagarde) already presiding over an EU institution (ECB), he's from the wrong country. In 2019 Renew surprised everyone by not putting forward one candidate but a team of 7, including Margrethe Vestager, Guy Verhofstadt, Luis Garicano, Nicola Beer, Violeta Bulc, Emma Bonino, Katalin Cseh none of who was likely to be Commission President but could be in line for top jobs.

The fact that the post-election deal making will take place under the Hungarian presidency is an added complication. Will EU leaders be tempted to try and prevent Orban from manipulating the process by rushing through a deal under the pro-European Belgian presidency?

9. Polish and Spanish elections could shift the balance in European Council

The make-up of the European Council is constantly shifting but currently consists of 9 leaders from EPP (RO EL SK IRL SE AT HR LV CY); 6 Socialists (DE ES FI DK MT PT); 6 Renew (FR NL BE Lux SI EE); 3 ECR (IT PL CZ) and 3 Independents (HU LT BG). While EPP has the most PMs, it has none of the large member states and if calculated by population size, it's well behind Renew and ECR.

This year there are elections in 9 member states which could change this balance,

with two of particular significance to the EU2024 elections.

- **Poland: November** – will the ruling nationalist PiS party win another majority and continue to confront Brussels over rule of law issues – or will Donald Tusk lead an opposition coalition to victory and restore Poland's EU credentials?
- **Spain: due before 10 December**: will the right wing PP beat the Socialists, and if so will they depend on far right VOX? How will the elections impact the Spanish presidency during the 2nd half of 2023?

The result of both elections will be felt in Europe. Following the Swedish and Italian elections we have seen the EPP parties form governments with nationalist ECR parties (Swedish Democrats and Fratelli d'Italia) while the ECR Czech Prime Minister Petr Fiala governs with the support of two EPP parties. A PP/VOX coalition in Spain could add to this trend and finally give the EPP a leader of one of the large member states.

The talk of closer EPP/ECR ties has been most visible with the overtures to the new Meloni government in Italy, with Weber, Metsola and von der Leyen all paying her visits. Close relations with the Italian government are helped by 2 former MEPs, the Foreign Minister, former EP President Antonio Tajani (Forza

and the Europe Minister Raffaele Fitto (former co-chair of ECR for Frattelli and initially a Forza MEP). Currently the Italian right has 43 MEPs split across 3 political groups (25 Lega, 10 FI, 8 FdI). If they stand together as a coalition as they did in the recent national election, will they find a better way to exert their numerical influence?

The main drawback to this narrative of closer EPP/ECR ties is the other big election in Poland. Donald Tusk's Civic Platform is the 2nd biggest national delegation in the EPP (after the Germans) and would be opposed to any ties with their bitter adversaries PiS who dominate the ECR group numerically.

10. Unfinished business – many proposals risk lapsing

EP rules make clear that any report that has not been adopted in plenary but remains at the committee stage lapses at the end of this mandate. There will be a rush to get through as many files as possible before the April 2024 final plenary session but the Belgian presidency in early 2024 will be faced with a huge workload. A number of key proposals from the end of 2022 are not due to be adopted in plenary until end 2023.

The Commission's work programme still foresees a number of major initiatives in the next few months which will have a real struggle to get beyond the committee stage. However memories of how the Single Use Plastic proposal was rushed through in 7 months before the 2019 election prove that where there is political will, there is a way.

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