EUROPEAN COUNCIL ON FOREIGN RELATIONS
ecfr.eu

POLICY BRIEF

A SHARP RIGHT TURN: A FORECAST FOR THE 2024 EUROPEAN PARLIAMENT ELECTIONS

Kevin Cunningham, Simon Hix with Susi Dennison, Imogen Learmonth

January 2024

SUMMARY

- The 2024 European Parliament elections will see a major shift to the right in many countries, with populist radical right parties gaining votes and seats across the EU, and centre-left and green parties losing votes and seats.
- Anti-European populists are likely to top the polls in nine member states (Austria, Belgium, the Czech Republic, France, Hungary, Italy, the Netherlands, Poland, and Slovakia) and come second or third in a further nine countries (Bulgaria, Estonia, Finland, Germany, Latvia, Portugal, Romania, Spain, and Sweden).
- According to our forecast, almost half the seats will be held by MEPs outside the "super grand coalition" of the three centrist groups.
- Inside the European Parliament, a populist right coalition of Christian democrats, conservatives, and radical right MEPs could emerge with a majority for the first time.
- This 'sharp right turn' is likely to have significant consequences for European-level policies, which will affect the foreign policy choices that the EU can make, particularly on environmental issues, where the new majority is likely to oppose ambitious EU action to tackle climate change.

Far-right parties are becoming increasingly dominant in national settings across many EU capitals. Whether in election results, such as the success of Geert Wilders' Freedom Party (PVV) in the Dutch general election in November, or in their ability to set the agenda from the opposition – such as the National Rally's support for France's regressive immigration bill in December – the far right played an important role in shaping European politics in 2023. 2024 is likely to see a continuation of this trend not only in national politics, but also at the European level, with early polls suggesting a more right-leaning European Parliament will emerge after the June 2024 European Parliament elections.

To determine how significant this shift could be and the effect it could have on the European Union's policies and those of national governments, we collected the most recent opinion polls in every EU member state and applied a statistical model of the performance of national parties in previous European Parliament elections, building on a model we developed and used for the 2009, 2014, and 2019 elections.

The results indicate that the European Parliament will likely take a sharp turn to the right after June 2024. While the parliament is not the most significant EU institution when it comes to foreign policy, the way in which the political groups align after the elections, and the impact that these elections have on national debates in member states, will have significant implications for the European Commission's and Council's ability to make foreign policy choices, most notably in implementing the next phase of the European Green Deal.

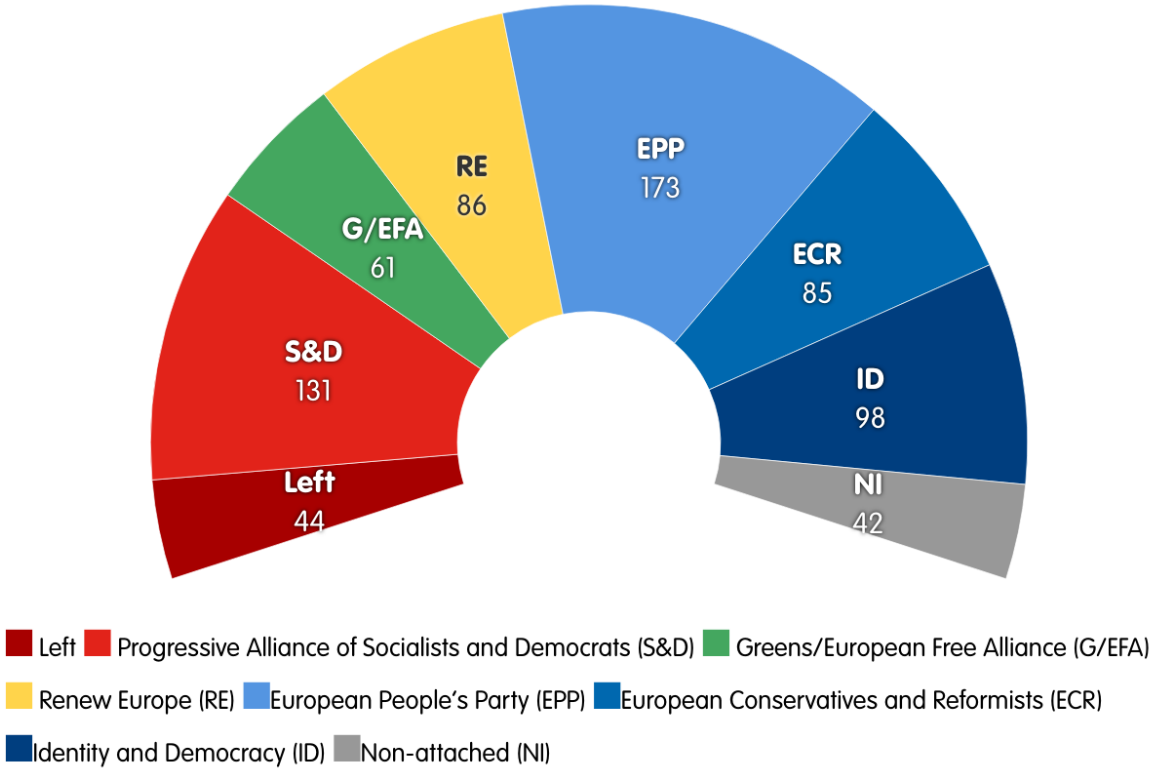
Results

Our model predicts the vote share that each national party will win in the 2024 European Parliament elections. From those vote shares we calculated how many seats each national party is likely to win, and how this could affect the political groups in the European Parliament. A full explanation of this model is given in the methodology section of this paper.

The following graphic shows:

- *current seats* – the number of seats each political group currently has in the European Parliament; and
- *projected seats* – the number of seats each political group would win in June 2024 if each national party performed as predicted by our statistical model (taking into account that the number of MEPs will increase from 705 currently to 720 in June 2024).

Figure 1: Projected make-up of the European Parliament



ECFR · ecfr.eu

The results show that the two main political groups in the parliament – the European People's Party (EPP) and the Progressive Alliance of Socialists and Democrats (S&D) – will likely continue to lose seats (they have lost seats in the last two European Parliament elections). This reflects the long-term decline in support for mainstream parties and the growing support for extremist and smaller parties across Europe, which is resulting in an increasing fragmentation of European party systems, at both the national and European levels.

Despite this, we expect the EPP to remain the largest group in the parliament, and therefore maintain most agenda-setting power, including over the choice of the next commission president.

We predict that the centrist Renew Europe (RE) group and the Greens/European Free Alliance (G/EFA) will also lose seats, falling from 101 to 86 and 71 to 61 respectively. Meanwhile, the Left group should increase their representation from 38 to 44 seats. In addition, if the Five Star Movement in Italy, which we predict will win 13 seats, decided not to sit with the non-attached (NI) MEPs, it may choose to join either the G/EFA or the Left, which would bolster the number of MEPs sitting to the left of the S&D.

But the main winners in the elections will be the populist right. The major winner will be the radical right Identity and Democracy (ID) group, which we expect to gain 40 seats and, with almost 100 MEPs, to emerge as the third largest group in the new parliament.

We also predict that the European Conservatives and Reformists (ECR) group will gain 18 seats. And, if Fidesz in Hungary (which we expect to win 14 seats) decides to join the ECR rather than to sit with the non-attached MEPs, the ECR could overtake RE and ID and become the third largest group.

We expect the ECR and ID groups together to account for 25 per cent of MEPs, and have more seats combined than the EPP or the S&D for the first time.

Figure 2: Forecast by political group and member state

Forecast Parliament (based on our model)

Current | Forecast

	Total	EPP	S&D	ID	RE	ECR	G/EFA
	720	173	131	98	86	85	61
	100%	24%	18%	14%	12%	12%	8%
Austria	20	5	4	6	2	0	3
Belgium	22	4	3	3	3	3	4
Bulgaria	17	5	3	3	5	1	0
Croatia	12	6	2	1	0	1	2
Cyprus	6	2	2	0	0	0	0
Czech Republic	21	3	0	3	8	3	4
Denmark	15	1	4	2	4	0	3
Estonia	7	2	1	2	2	0	0
Finland	15	4	3	0	2	3	2
France	81	9	6	30	18	0	8
Germany	96	26	12	20	7	1	18
Greece	21	9	3	1	0	2	0
Hungary	21	0	4	0	1	0	0
Ireland	14	2	1	0	3	1	1
Italy	76	8	14	8	6	27	0

Additional 12 rows not shown.

ECFR · ecfr.eu

Our model predicts significant seat losses for the EPP in Germany, Italy, Romania, and Ireland, but significant gains in Spain. We forecast that the S&D will lose a lot of seats in Germany, and the Netherlands, and will gain most seats in Poland. We expect RE to lose most seats in France and Spain, and to make most gains in the Czech Republic and Italy.

We expect the ECR to pick up a lot of seats in Italy, as a result of Brothers of Italy (FdI) emerging as one of the largest delegations in the European Parliament (with 27 seats). With the expected fall of Forza Italia to only 7 seats, though, the EPP may approach Brothers of Italy to join their group. Our model predicts that the ECR will lose seats in Poland, and gain most seats in Romania and Spain, in addition to Italy. It predicts that ID will lose many seats in Italy, with the decline of Lega, but these losses will be offset by significant gains in France, Germany, the Netherlands, Poland, Portugal, Bulgaria, and Austria.

We expect the G/EFA to lose most seats in Germany, France, and Italy. Finally, our model predicts that the Left will make most gains in Germany, France, and Ireland.

Naturally, there is some uncertainty in these predictions. In addition to the inevitable uncertainty of current opinion polls and our forecast of the likely vote shares and seats for each national party, there is also uncertainty regarding which political groups some parties will eventually join. The table below includes the parties whose group membership after the 2024 elections is uncertain. There are two types of uncertain parties: (1) those that are not currently represented in the parliament and are not currently members of a European political party (which would automatically determine their group membership); and (2) those that currently have MEPs but might join a different political group in the next parliament.

Table 1: Parties whose group membership is uncertain

Click to sort by country: Bulgaria / Croatia / Cyprus / Denmark / France / Germany / Greece / Hungary / Italy / Latvia / Lithuania / Netherlands / Poland / Slovakia / Spain / ☒ All

Party	MEPs 2019 — Forecast MEPs 2024	Current group	Expected group	Possible group	Ideology
FdI	6 — 27	ECR	ECR	EPP	Nationalist, soft-Eurosceptic, social conservative
Fidesz	13 — 14	NI	NI	ECR	Populist, social conservative, free market
M5S	14 — 13	NI	NI	G/EFA, Left	Populist, radical left, environmentalist
TD	0 — 10		EPP	Renew	Christian democrat, centre-right, pro-European
BSW	0 — 8		Left	NI	Radical left, populist, anti-immigration
Sumar	6 — 6	Left	G/EFA	Left	Left populist, pro-Europe, feminist, environmentalist

Additional 22 rows not shown.

ECFR · ecfr.eu

We have already mentioned the three largest parties in this list: Fidesz from Hungary, and Brothers of Italy and the Five Star Movement from Italy. Beyond these, there are 25 other parties whose group membership remains uncertain. Together, we predict that these 28 parties will win 122 seats in June 2024, meaning that the eventual sizes of the groups might be somewhat different from those in our forecast.

However, as the table shows, most of the uncertain parties are those that will sit to the right of the EPP, in either the ECR, ID, or as non-attached MEPs. As a result, our overall forecast about the balance of power in the parliament between the left and right, and the likely “sharp right turn” is unlikely to change as a result of changes to these parties’ current or expected group membership.

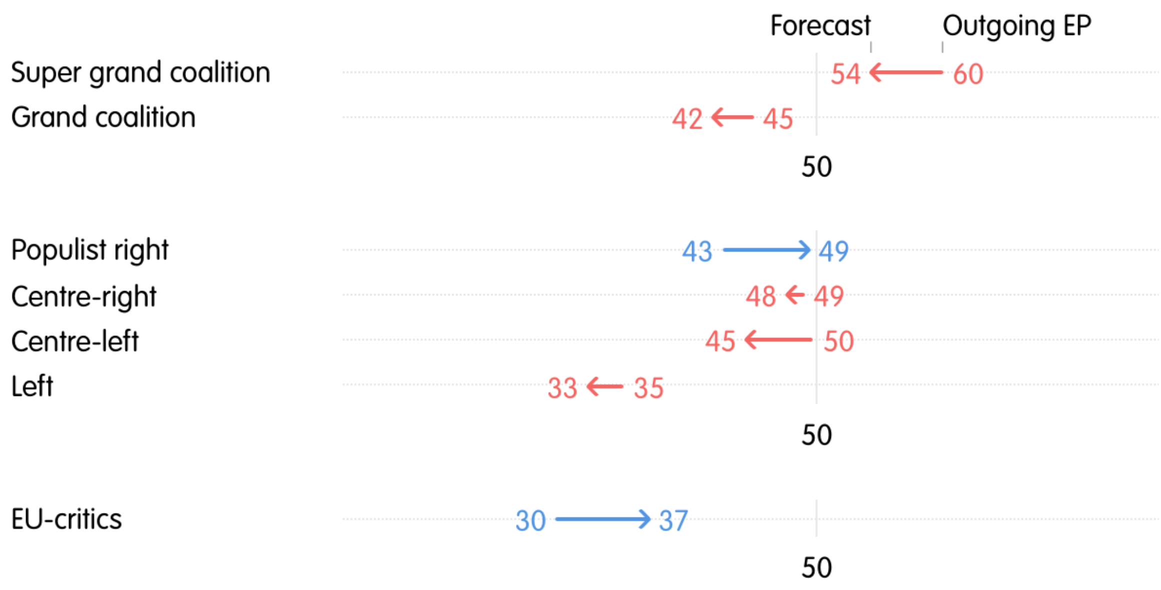
Coalition patterns

These changes will affect the sizes of the potential coalitions between the political groups in the chamber, which our analysis predicts will benefit the right.

The “grand coalition” of the EPP and the S&D, which lost a majority in the parliament for the first time in 2019, is set to lose seats, holding 42 per cent of the total, compared to its current 45 per cent. Even with the RE group, the “super grand coalition” of the three centrist groups will only hold 54 per cent of the seats, compared to its current 60 per cent. With the average level of voting cohesion within groups in the European Parliament – which means that each group cannot always guarantee all their MEPs will follow the group voting instructions – 54 per cent of the seats might not be enough for these three groups to guarantee a winning majority when they vote together.

The left-right balance in the parliament will shift dramatically to the right. According to our model, the left coalition – of the S&D, the G/EFA, and the Left – will lose seats, with 33 per cent of the total, compared to the current 35 per cent. And, even if the left coalition can secure the support of RE – which they have done on environmental and social rights issues during the current term – it would hold only 45 per cent of the seats, compared to 50 per cent in the current parliament.

Figure 3: Coalition sizes. In per cent



Super grand coalition: EPP+S&D+RE. Grand coalition: EPP+S&D.
Populist right: EPP+ECR+ID. Centre-right: EPP+ECR+RE. Centre-left: S&D+RE+G/EFA+Left. Left: S&D+G/EFA+Left.
EU-critics: ECR+ID+Left+NI.

ECFR · ecfr.eu

By contrast, the size of the coalitions on the right is set to increase. A centre-right coalition – of the EPP, RE, and the ECR – will likely lose some seats, holding 48 per cent instead of the current 49 per cent. However, a "populist right coalition" – made up of the EPP, the ECR, and ID – will increase their share of the seats from 43 per cent to 49 per cent. In addition, the majority of the non-attached MEPs are from extreme right parties, meaning that with their support, majority coalitions could form to the right of RE for the first time in the history of the European Parliament. The "pivotal MEP" in the next parliament is likely to be in the EPP group, rather than in the centrist RE (or previously Liberal) group for the first time.

Finally, our model predicts that the "EU-critics" on the radical right and radical left will increase dramatically to hold 37 per cent of the seats, compared to 30 per cent in the current parliament.

In short, we expect that populist voices, particularly on the radical right, are likely to be louder after the 2024 elections than at any point since the European Parliament was first directly elected in 1979.

Policy implications

The changes to the political groups and coalitions will have consequences for the EU's policy agenda and the direction of future EU legislation. Coalitions on policy issues in the European Parliament tend not to be the result of formal agreements. Instead, political groups decide how to vote issue by issue. Nevertheless, we can use the voting patterns and winning coalition sizes in the current parliament to predict how far EU policies might change with the predicted group sizes and balance of power after the 2024 elections.

Based on the analysis of recorded (roll-call) votes in the European Parliament collected by VoteWatch, different coalitions have tended to dominate in different policy areas in 2019-2024:

- A centrist grand coalition (EPP + S&D, usually also with RE) typically won on budgets, budgetary control, culture and education, economic and monetary affairs, foreign affairs, internal market and consumer protection, legal affairs, and transport and tourism.
- A centre + left coalition (S&D + RE+ G/EFA + the Left) usually won on civil liberties and justice and home affairs, development, employment and social affairs, environment, and women's rights and gender equality.
- A centre + right coalition (EPP + RE + ECR, and sometimes ID) usually won on agriculture and rural development, fisheries, industry and research, and international trade.

Our research suggests that in most of these policy areas, these coalitions and winning patterns are likely to continue, at least at the start of the next parliamentary term. For example, on foreign affairs, such as EU support for Ukraine, the majority in the next European Parliament is likely to back a continuation of the type of financial, logistical, and military aid that Western states have been approving for Kyiv since February 2022. However, there will be a larger number of MEPs (particularly in ID and among the non-attached MEPs) who are more sympathetic towards Russia. Furthermore, support for Ukraine in the rest of the parliament might also soften as national parties start to respond to the changing opinions of their voters, expressed by their votes in the European Parliament elections.

Nevertheless, our analysis suggests two significant shifts in coalition patterns. Firstly, the smaller size of the centrist grand coalition, even with RE support, is likely to mean that it will no longer be as dominant on some policy issues. In particular on economic and monetary affairs and internal market and consumer protection – where the grand coalition has won votes in the current parliament by smaller margins – we could see a significant shift to the right, as the EPP looks to partners to its right rather than to the S&D.

Given the Euroscepticism of the ECR and ID, and some national parties in the EPP, we could therefore see majorities in the next parliament in support of more economic, fiscal, and regulatory freedom for member states. This bloc would be likely to vote against proposals from the commission to enforce common rules and instead side with the growing group of national governments – such as those in Hungary, Italy, Slovakia, and Sweden – which are pushing for less interference from Brussels in national economic, fiscal, and regulatory policies.

Secondly, the smaller number of MEPs on the left relative to the right means that in several policy areas in which the left has tended to win by small margins, a right-wing majority will now be more likely to win than a left-wing majority. This is likely to be particularly true in two areas – civil liberties and justice and home affairs, and environment – where narrow centre-left majorities may be replaced by a new populist right winning coalition (of EPP + ECR + ID + most non-attached MEPs).

On civil liberties and justice and home affairs, this could have major implications for EU migration and asylum policies, where there is likely to be a majority in the European Parliament that supports very restrictive immigration policies and will seek to push the commission to reform the EU's asylum policy framework to allow more discretion for member states and to limit any sharing of refugee allocations.

This new winning majority on civil liberties and justice and home affairs could also have implications for the EU's efforts to enforce the rule of law. In the current parliament there has been a narrow majority in favour of the EU imposing sanctions (such as withholding budget payments) on member states in which the rule of law is backsliding – in particular in Hungary and Poland. But after June 2024 it is likely to be harder for the centrist and centre-left MEPs (in RE, S&D, G/EFA, the Left, and parts of EPP) to hold the line against the continued erosion of democracy, rule of law, and civil liberties in Hungary and any other member state that might head in that direction.

But the biggest policy implications of the 2024 European Parliament elections are likely to concern environmental policy. In the current parliament, a centre-left coalition (of S&D, RE, G/EFA, and the Left) has tended to win on environmental policy issues, but many of these votes have been won by very small margins. The significant shift to the right in the new parliament will mean that an 'anti-climate policy action' coalition is likely to dominate. This would significantly undermine the EU's Green Deal framework and the adoption and enforcement of common policies to meet the EU's net zero targets.

Perhaps the best illustration of this is what would have happened if the key vote on the EU's nature restoration law was held after the 2024 elections. The law forces member states to restore at least 20 per cent of the EU's land and seas by 2030, with binding targets to restore at least 30 per cent of degraded habitats by 2030, rising to 60 per cent by 2040 and 90 per cent by 2050. The key vote was on 12 July 2023, on a motion by the EPP to reject the commission's proposal outright. The proposal to reject failed by only 12 votes (312 in favour, 324 against), and the parliament then went on to accept the commission's proposal, with a series of votes against amendments from the groups on the right to water down the proposed actions.

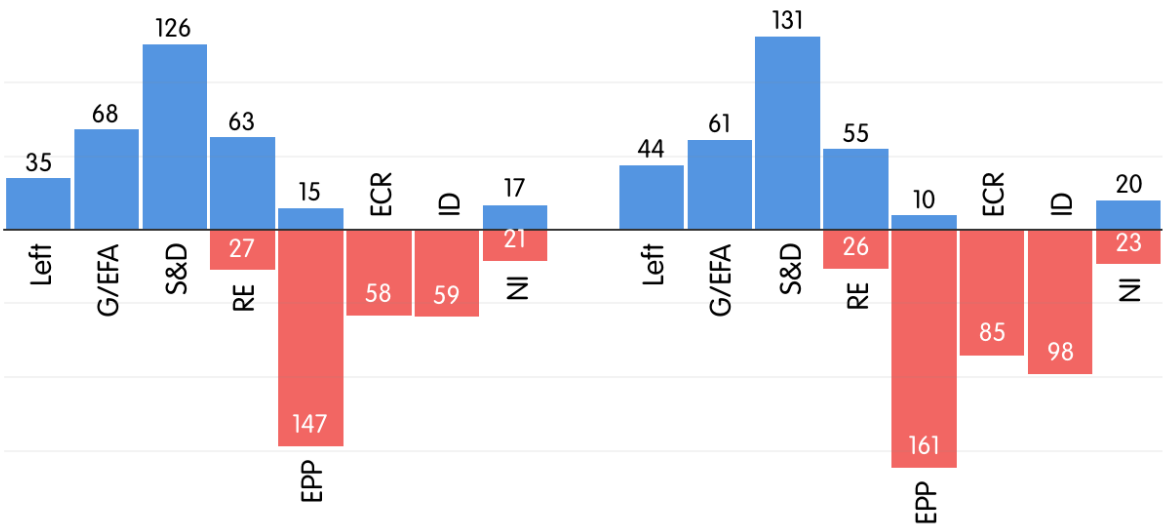
Figure 4: How a key environmental law would have been rejected by the post-2024 parliament

Panel A: Result of vote on 12 July 2023

Total against rejecting commission proposal: 324
Total in favour of rejecting commission proposal: 312

Panel B: Result using predicted party sizes after June 2024

Total against rejecting commission proposal: 321
Total in favour of rejecting commission proposal: 393



ECFR · ecfr.eu

The graphic above shows the breakdown of votes on 12 July 2023 and what the outcome would have been had the national parties in each group voted the same way as they did in July but with their projected allocations of MEPs after the elections in June 2024. For example, in July 2023 all eight Brothers of Italy MEPs voted to reject the commission's proposal, but the party's seat count is likely to increase to 27 MEPs after June 2024. And, on the other side, all 16 German SPD MEPs voted against the rejection, but this party is likely to be down to only 12

MEPs after June 2024.

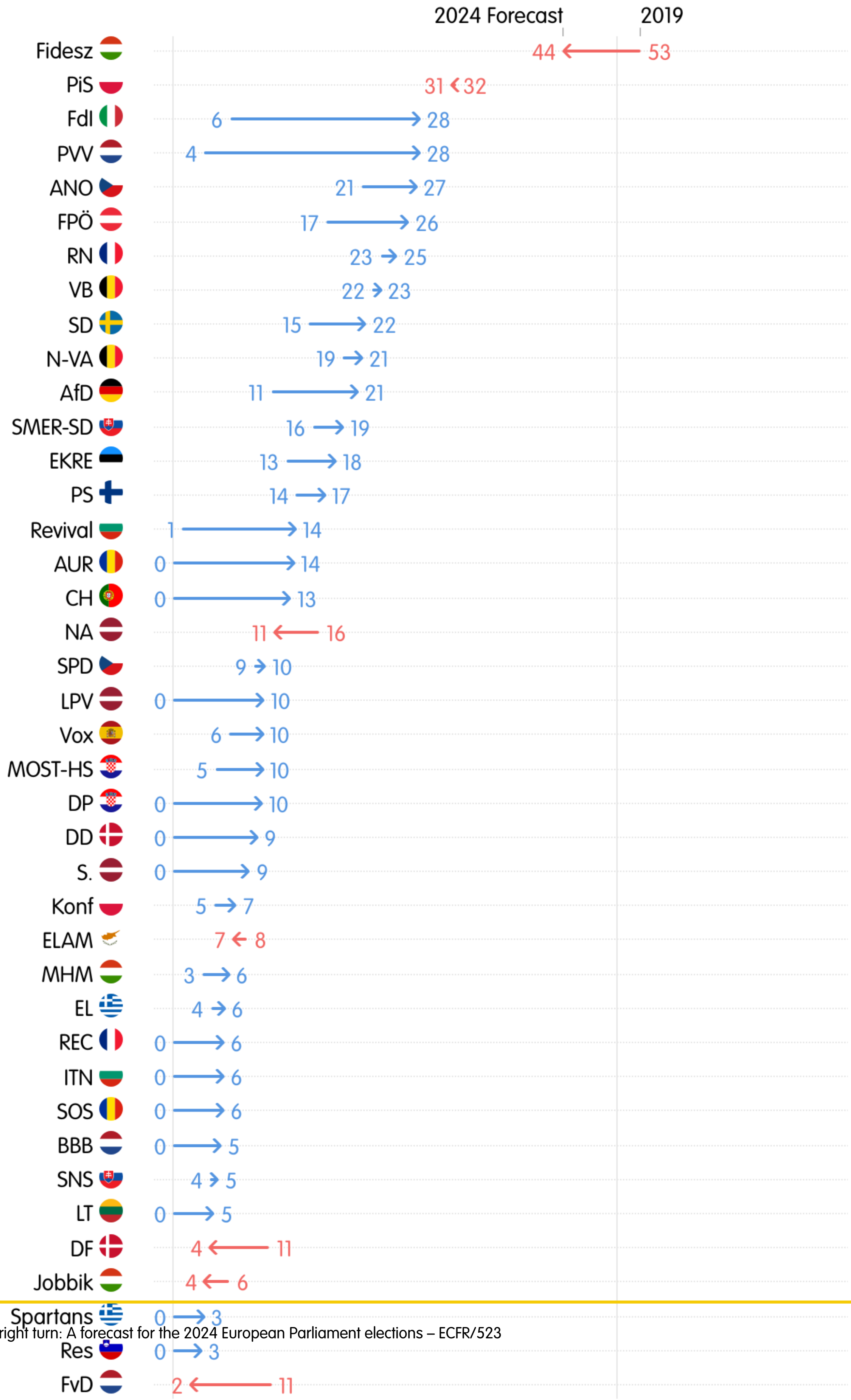
Those against rejecting the commission's proposal won by a small majority of 12 votes in July. However, if the vote had been held with the projected constellations, those in favour of rejecting the proposal would have won by 72 votes (393 votes against the commission's proposal, to 321 votes in favour). As a result, a key pillar of the EU's Green Deal would have been rejected. The dramatic increase in the number of MEPs to the right of the EPP is likely to seriously limit the EU's actions to tackle the climate crisis.

National-level implications

The European Parliament elections will not only have implications for politics and policy at the EU level, they will also have an impact on domestic politics in many countries. It is often said that the European Parliament elections are essentially 27 national elections, and while the national debates that take place in the run-up to the June 2024 elections will not affect the shape of the governments in the member states, they will affect the positions that the heads of state or government feel able to take in the months and years that follow the elections. If political parties campaign on a platform to block certain EU decisions, or the way the citizens in a country have voted in the European Parliament elections is perceived to demand a tougher mandate on immigration, a "no" to further EU enlargement, or a vote against the EU's Green Deal agenda, this will influence the national governments' approaches to EU policymaking after the 2024 elections.

The main takeaway from the elections in many member states will be the success of anti-establishment populist parties. The graphic below shows the change in vote shares between 2019 and 2024 for populist parties that are likely to win at least 6 per cent of the votes in 2024. Anti-European populist parties are likely to top the polls in nine member states (Austria, Belgium, the Czech Republic, France, Hungary, Italy, the Netherlands, Poland, and Slovakia), and come second or third in a further nine countries (Bulgaria, Estonia, Finland, Germany, Latvia, Portugal, Romania, Spain, and Sweden).

Figure 5: Performance of anti-establishment populist parties, 2019 and 2024. In per cent



These results will be particularly significant in several member states which will hold national parliament elections soon after the European Parliament elections:

Austria

In Austria, the 2024 European Parliament election will come just a few months before the next national election, which is set for autumn 2024. Momentum gained by the radical right Freedom Party (FPÖ) in the European Parliament election could easily affect the outcome of the national election. If the two mainstream parties – the centre-right People's Party of Austria (ÖVP) and the centre-left Social Democratic Party of Austria (SPÖ) – continue to haemorrhage support, the FPÖ could convert the success of the anti-system change vote into a national electoral victory.

Bulgaria

Bulgaria has experienced five parliamentary elections since the beginning of 2021. This level of instability has contributed to the rapid acceleration of the anti-system vote, which the far-right and pro-Russia party, Revival, has greatly benefitted from: it won 3 per cent of the vote in the first of these five elections in April 2021, but 14 per cent in the last election in 2023, making it the third largest party. If Revival wins three seats in the European Parliament election, as we predict, it will enter the European Parliament for the first time, gaining institutional legitimacy. This could set a dangerous precedent as Bulgaria's mainstream parties continue to lose their own legitimacy: after holding its fifth national election in two years, Bulgaria is still nowhere near forming a stable government.

France

In France, the 2024 European Parliament election will be the first test for the latest government led by President Emmanuel Macron, which is currently hovering at a 30 per cent approval rating. It will be French voters' first opportunity to express this disapproval electorally, and our model shows that there is every chance that Marine Le Pen's radical right National Rally (RN) will win the election. This would set the tone for the 2027 presidential election and could establish Le Pen as the potential next French president. The European Parliament elections will also be the first test for the French left after the break-up of the New Ecological and Social People's Union (NUPES).

Germany

In Germany, the European Parliament election is likely to see the far-right Alternative for Germany (AfD) become the second largest German party in the European Parliament, behind a re-emergent Christian Democratic Union/Christian Social Union (CDU-CSU). The election will also be the first test for the new anti-immigrant radical left Alliance Sahra Wagenknecht (BSW). The next German parliamentary elections will be held in autumn 2025. The continued polarisation of German politics will therefore be a major concern for the centrist parties, and the CDU/CSU will be under pressure to say whether they would be willing to enter a coalition with the AfD.

Italy

In Italy, the European Parliament election will be the first electoral test for the new government led by prime minister Giorgia Meloni, as well as the new leaders of Forza Italia (led by deputy prime minister Antonio Tajani) and the centre-left Democratic Party (PD) led by Elly Schlein. A decisive victory for Meloni's Brothers of Italy, at the expense of its two coalition partners (Forza Italia and the League), would establish Brothers of Italy as the dominant party on the right in Italy. Meanwhile, with the PD currently predicted to underperform, initial high hopes that Schlein would reform the party's reputation and vote share after their poor performance in their 2022 election may well be dashed. With voters on the left split between PD, the Five Star Movement, and the centrist parties, it remains to be seen whether these elections can establish a path forward for the left in Italy.

The Netherlands

In the Netherlands, it is far from certain whether a government will be in place by the time of the European Parliament election or whether the country will be heading towards another national election. Either way, Gert Wilders's (PVV) is set to emerge as the largest Dutch party in the European Parliament, while Peter Omzigt's New Social Contract (NSC) will win MEPs for the first time. A decisive victory for these two parties could encourage them to form a coalition together. Meanwhile, we expect the combined Green-Left (PvdA-Groen Links) list to do less well in the European Parliament election than they did in the recent national election (and in the 2019 European Parliament election), which may raise questions about the viability of this alliance going forward.

Poland

In Poland, the European Parliament election will be an opportunity to see whether Polish voters have sustainably turned away from the populist right Law and Justice party (PiS), as they did in the October 2023 national election. We expect PiS to top the poll in Poland in June 2024 with 31 per cent of the votes. The centrist European Coalition (KE) alliance is expected to come second with 24 per cent of the votes, closing the gap between it and PiS even further. Meanwhile, the new centrist Third Way (TD) should do well and win MEPs for the first time, further consolidating its position as a key ally of KE in a post-PiS Poland. Having performed worse than expected in the national election, the radical right is expected to do much better in June 2024, mainly by taking votes from PiS.

Spain

In Spain, the European Parliament election will be a referendum on prime minister Pedro Sánchez's Socialist Party (PSOE) government and the deal Sánchez made with the Catalan nationalists to win the premiership after the July 2023 national election. We expect a significant backlash against Sánchez and his deal, with the centre-right People's Party (PP) emerging as the clear winner and with the radical right Vox winning 10 per cent of the votes. Meanwhile, on the left, the new Sumar alliance of the radical left and the greens is set to lose votes compared to the 2023 national election and compared to the combined vote share of the constituent parties in the 2019 European Parliament election.

Sweden

Sweden is likely to buck the trend elsewhere in Europe, with the European Parliament election seeing a further consolidation of support for Magdalena Andersson's centre-left Swedish Social Democratic Party (SAP), following its re-emergence as the largest party after the September 2022 national election. Nevertheless, as in many other countries, the radical right Sweden Democrats (SD) look set to come second in the poll, mainly at the expense of the centre-right Moderata, which is likely to be punished for tacitly supporting Andersson's minority government.

A wake-up call

The results of our analysis should serve as a wake-up call for European policymakers about what is at stake in the 2024 European Parliament elections. The implications of this vote are far reaching for the geopolitical direction of the European Council and European Commission from 2024 onwards. The next European Parliament can be expected to block legislation necessary to implement the politically difficult next phase of the Green Deal – impacting the EU's climate sovereignty – and push for a harder line on key issues for other areas of EU sovereignty including migration, enlargement, and support for Ukraine. National governments will feel constrained by the way these elections shape domestic debates, affecting the positions they can take in the European Council. This is likely to bolster the growing axis of governments around the European Council table that are attempting to limit the EU's influence from within – those of Hungary, Italy, Slovakia, Sweden, and likely a PVV-led government in the Netherlands.

These findings should also be set against the expectation that whether or not Donald Trump wins the US presidential election in autumn 2024 – and the polls currently suggest there is a real possibility he will – Europe will have a less globally engaged United States to rely on. This may increase the inclination of anti-establishment and Eurosceptic parties to reject strategic interdependence and a broad range of international partnerships in defence of European interests and values, instead seeking to pursue a more cautious approach to foreign policy decisions.

Progressive policymakers need to start considering the trends that are driving these voting patterns and begin preparing narratives that can cut through them. Rather than allowing the discussion of costs and risks in driving forward the green transition, supporting Ukraine, or de-risking in international relationships to dominate the debate, they need to craft a clearer message about the economic and security imperatives to do these things, as it is these concerns that are driving voters' thinking.

They need recognise the nuances in European citizens' thinking and compete politically from their own positions of strength with proactive policies, rather than resorting to the fear-driven narratives that the far right is using successfully. For example, on climate, after the supply insecurity brought about by Russia's war on Ukraine, there is a public will to rely less on fossil fuels. After the drastic weather events affecting many EU countries and reports of worse to come, there is a desire not to lose momentum on climate action, and with the new green competitiveness framing from the US, there is a will among the business community to embrace green tech – with support from their governments to de-risk supply chains, and with investment and the right regulatory and permitting environment.

Sustaining the 'hearts and minds' campaign around green competitiveness as a policy choice for Europe is of course not only about narratives. Policy proposals for a just transition, in which the costs of decarbonisation are evenly shared between all parts of society need to be more detailed; significantly better funded, including at the European level; and current good examples better shared among member states, to support more vulnerable citizens who are currently fearful and turning towards the far right.

While progressive European leaders cannot, and should not, tell voters what to do, they can build a credible alternative to a sharp right turn in the political mandate given to the next set of EU institutions. From the outset of 2024, they need to tell a convincing story about the necessity of reaching outward in a dangerous world.

Methodology

Our methodology is based on a statistical model which predicts the performance of national parties in European Parliament elections.[1] The model has been updated since our forecast of the 2019 European Parliament elections based on the actual results of those elections.

We use the parties' results from current polling as a baseline, but adjust these to account for systematic differences between opinion polling in January and how parties will likely perform in the June elections. To approximate these differences we use data from the 2014 and 2019 European Parliament election cycles. Specifically, our statistical model uses only the information known in early January 2014 and early January 2019. For example, if a party merges, dies, or forms between January and the election, we do not use this information.

Our model uses five sources of information about each national party in the EU in January 2024:

1. The current standing of the party in national election opinion polls;
2. The vote share that the party won in the most recent national parliamentary election;
3. Whether the party is in government or opposition at the time (with a distinction between minor coalition partners and the party of the prime minister);
4. Which broad political family the party belongs to and whether it is a Eurosceptic party; and
5. The length of time since the last general election.

The statistical model estimates support for a given party as a combination of 78 per cent of the party's opinion polling in December/January (based on national election vote intention) and 13 per cent of its vote share at its most recent parliamentary election.

This suggests that while current polling is a much better predictor than the most recent general election, the general election result does have some input. This is perhaps because a party's performance at a general election reveals something about its ability to convert opinion poll popularity into actual votes. Or perhaps it reveals voters' tendency to vote for a party that they had supported in a previous election.

If the party did not run in the most recent general election, the model takes 139 per cent of its current polling. This larger share is partly because the party has a zero value for its general election result but mostly it shows that new parties tend to do better in European elections.

Some parties do better in European Parliament elections compared to others. Green parties specifically tend to do a little bit better, winning 105 per cent of current polling. By contrast, social democratic, liberal, and left-wing parties tend to do worse, winning 65 per cent, 67 per cent, and 68 per cent respectively of their current polling. This is perhaps because green parties have tended to draw support from these parties in European elections as climate change is typically more salient for voters at the European level than at the national level.

Eurosceptic parties also tend to do a little better in European elections compared to the average, though much of their support already seems to be accounted for, or 'priced into', their national election support levels due to the relative salience of immigration in those contests.

Finally, the relative support levels of parties at the European Parliament elections are also influenced by whether the party is in government or in opposition. Parties in government tend to do a little better, specifically the parties that hold the office of the prime minister, followed by their minor coalition partners, and then lastly opposition parties. The scale of this effect is stronger the longer the party is in government prior to the election. We have therefore introduced a variable to account for the relative length of time a party has been in government or opposition. This is a reversal of earlier second-order election models where government parties have tended to do worse in European elections. However, those models are approximated at the time of the election. Here, we are trying to approximate vote shares six months ahead of an election in a volatile political environment. As such, this relative support for government parties is perhaps closely related to the nature of political instability in many countries. Parties in government and particularly those that hold high office are perhaps more likely to see some level of sustained support, whereas support for opposition parties is more likely to fluctuate between now and the election.

It is important to note that, in many countries, party systems and the standing of parties will change between now and the European Parliament elections. The parties in government and opposition will invariably change in some countries. More significantly, some new parties will emerge, while others will die out. This additional uncertainty weakens our ability to project this far ahead of the election. As we get closer to the election, these uncertainties will reduce and the model estimates will change.

For the current predictions we assess the following characteristics for each potential political party today: their governing status, their vote share in the previous national election, and their political family. Due to the nature in which political parties merge and separate around general elections and European Parliament elections, significant judgment is required to assess the true vote share for political parties from the previous general election in relation to their likely composition for the European Parliament elections. Current polling for each political party is based on an analysis of their mean and median polling. We seek to strike a balance between having more polls versus more recent polls for each country, depending on whether there are any systematic changes in vote share worth noting and any systematic differences between polling houses.

From the predicted vote shares from the model, we then calculate the number of MEPs each national party should win, according to the particular electoral system and seat allocation method used in each member state.

We then use the predicted number of MEPs for each national party to calculate how many seats each political group in the European Parliament is likely to win. We assume that each national party currently in the parliament will sit in the same group as it currently does.

National parties that do not currently have any MEPs but which we forecast to win one or more seats are either assigned to the parliamentary group of the transnational European party to which they already belong, or are assigned to the most likely political group given their political ideology.

About the authors

Kevin Cunningham is a lecturer in politics, political strategist, and pollster. He has worked for a number of political parties, most notably leading the targeting and analytics for UK Labour. Cunningham also specialises in the politicisation of immigration and worked for three years as a researcher on an EU-funded project to understand the politicisation of immigration. He runs Ireland Thinks, working principally for state bodies, academics, and political parties.

Simon Hix is Stein Rokkan chair in comparative politics at the European University Institute in Florence. He was previously vice-president of the London School of Economics and the

inaugural Harold Laski chair in political science at LSE. He has written over 150 books, academic articles, policy papers, and research-related blogs on European and comparative politics. Hix has won prizes for his research from the American Political Science Association and the UK-US Fulbright Commission. Simon is a Fellow of the British Academy and a Fellow of the Royal Society of Arts. Simon has been forecasting European Parliament elections since 1999.

Susi Dennison is a senior policy fellow at the European Council on Foreign Relations and the director of ECFR's European Power programme. Her topics of focus include strategy, politics, and cohesion in European foreign policy; climate and energy; migration; and the toolkit for Europe as a global actor.

Imogen Learmonth is a researcher and programme manager at Datapraxis, an organisation that provides strategic advice, public opinion research, and modelling and analysis services to political parties, non-profit organisations, media, and research institutes across Europe. She leads Datapraxis's cross country and thematic research programme. Previously, Learmonth helped manage and conduct academic and industry research into counter-extremism and the far right, with a focus on incel culture and radical misogyny, as well as state-funded malign influence campaigns. She also has a background in journalism.

Acknowledgments

As with all ECFR's data work, this report is the result of a real team effort, but we are grateful in particular for Flora Bell's excellent editing, which has greatly improved the clarity of the paper, and for Nastassia Zenovich's work on the many graphics. Any mistakes of course remain the authors' own.

Annexe

Party	Abbr.	share 2019	share 2024	Difference	MEPs 2019	MEPs 2024
Freiheitliche Partei Österreichs	FPÖ	17.2%	26.4%	9.…	3	6
Österreichische Volkspartei	ÖVP	34.6%	24.6%	−10.0%	7	5
Sozialdemokratische Partei Österreichs	SPÖ	23.9%	18.8%	−5.1%	5	4
Die Grünen - Die Grüne Alternative	GRUENE	14.1%	12.7%	−1.4%	3	3
Neos – Das Neue Österreich	NEOS	8.4%	8.4%	−0.0%	1	2
Kommunistische Partei Österreichs Plus	KPÖ	0.8%	2.5%	1.7%	0	0
Bierpartei Österreich	BIER	0.0%	1.9%	1.9%	0	0
JETZT - Liste Pilz	JETZT	1.0%	0.0%	−1.0%	0	0
Vlaams Belang	VB	22.4%	23.3%	0.9%	3	3
Nieuw-Vlaamse Alliantie	N-VA	19.1%	21.2%	2.1%	3	3
Christen-Democratisch & Vlaams	CD&V	14.5%	12.5%	−2.0%	2	2
Groen	Groen	12.4%	12.0%	−0.4%	1	2
Vooruit	Vooruit	10.2%	11.8%	1.6%	1	1
Open Vlaamse Liberale en Democraten	Open VLD	16.0%	10.3%	−5.7%	2	1
Partij van de Arbeid van België	PVDA	5.0%	7.4%	2.4%	0	1
Parti socialiste	PS	26.9%	20.0%	−6.9%	2	2
Écologistes Confédérés pour l'Organisation de Luttes Originales	Ecolo	19.9%	19.0%	−0.9%	2	2
Mouvement Réformateur	MR	19.3%	17.9%	−1.4%	2	2
Parti du Travail de Belgique	PTB	14.6%	12.8%	−1.8%	1	1
Les Engagés	LE	8.9%	12.0%	3.1%	1	1

Additional 270 rows not shown.

The forecast vote shares do not add up to 100 per cent because we do not show minor parties or votes for "other" parties.

ECFR · ecfr.eu

[1] See Michael Marsh (2008) Testing the Second-Order Election Model after Four European Elections. *British Journal of Political Science* 28 (4): 591-607; Simon Hix and Michael Marsh (2007) Punishment or Protest? Understanding European Parliament Elections, *Journal of Politics* 69(2) 495-510; and Simon Hix and Michael Marsh (2011) Second-Order Effects Plus Pan-European Political Swings: An Analysis of European Parliament Elections Across Time, *Electoral Studies* 30(1) 4-15.

ABOUT ECFR

The European Council on Foreign Relations (ECFR) is the first pan-European think-tank. Launched in October 2007, its objective is to conduct research and promote informed debate across Europe on the development of coherent, effective and values-based European foreign policy. ECFR has developed a strategy with three distinctive elements that define its activities:

- A pan-European Council. ECFR has brought together a distinguished Council of over two hundred Members – politicians, decision makers, thinkers and business people from the EU's member states and candidate countries – which meets once a year as a full body. Through geographical and thematic task forces, members provide ECFR staff with advice and feedback on policy ideas and help with ECFR's activities within their own countries. The Council is chaired by Carl Bildt, Lykke Friis, and Norbert Röttgen.

- A physical presence in the main EU member states. ECFR, uniquely among European think-tanks, has offices in Berlin, London, Madrid, Paris, Rome, Sofia and Warsaw. Our offices are platforms for research, debate, advocacy and communications.

- Developing contagious ideas that get people talking. ECFR has brought together a team of distinguished researchers and practitioners from all over Europe to carry out innovative research and policy development projects with a pan-European focus. ECFR produces original research; publishes policy reports; hosts private meetings, public debates, and "friends of ECFR" gatherings in EU capitals; and reaches out to strategic media outlets.

ECFR is a registered charity funded by the Open Society Foundations and other generous foundations, individuals and corporate entities. These donors allow us to publish our ideas and advocate for a values-based EU foreign policy. ECFR works in partnership with other think tanks and organisations but does not make grants to individuals or institutions. ecfr.eu

ISBN: 978-1-916682-23-8. Published by the European Council on Foreign Relations (ECFR), 4th Floor, Tennyson House, 159-165 Great Portland Street, London W1W 5PA, United Kingdom.