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Ipsos

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INTRODUCTORY
EDITORIAL

Welcome to this very special edition of the Ipsos European Public Affairs (EPA) digest.

It will not have escaped you that this year is a historic one for democracy worldwide. Over half of the global population across more than 60 countries will be exercising their right to vote. The European Parliament (EP) elections on 6-9 June will see around 400 million EU citizens taking to the polls, placing these elections among the largest in the world and second only to the Indian parliamentary election. We wanted to mark the occasion by bringing together some of Ipsos' best minds in European electoral analysis, to provide their views on the key issues at stake – and perhaps a prediction or two!

In our lead feature we speak with Oliviero Marchese, Ipsos' Global Director of Elections Research, to get a better understanding of the intricate art that is election polling. He brings us up to speed on current best practices, persistent challenges and the innovative solutions he and Ipsos' other polling specialists are implementing to get to grips with these.

We then present a series of articles that explore the dynamics and complexities of the EU political landscape ahead of the EP elections. Robert Grimm of Ipsos Germany considers what the EU means to Europeans today and potential implications for June's ballot. Mathieu Gallard from Ipsos France delves deeper, exploring the question of whether distinctly pan-European trends are beginning to emerge in EU elections, challenging the traditional notion of these elections as mere

patchworks of national votes. Andrea Scavo and Sjoerd van Heck of Ipsos Netherlands and Italy respectively, join forces to examine political polarisation within the EU, zooming in on the rise of the radical right in their own countries.

Elsewhere in this edition, we provide a round-up of latest electoral research and insights from across Ipsos, covering not only European elections but also the forthcoming US presidential contest and the UK General Election, both of which could herald further momentous changes in the global order.

Compiling this edition really reinforced our pride in being part of a company that is deeply committed to delivering reliable, up-to-the-minute insights to our clients and society at large. We hope this commitment shines through in the following pages and makes for a stimulating read. Enjoy!

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TAKING THE VOTER'S PULSE:
THE CHALLENGES AND REWARDS OF ELECTORAL POLLING

In the run up to the 2024 European Parliament elections, political candidates, pundits and interested voters are looking to opinion polls to see how the results might play out and what this will mean for the future direction of EU politics. Yet, in a rapidly evolving electoral environment, it is becoming increasingly difficult to make up-to-the minute, accurate predictions on voting. To understand more about the challenges, as well as latest best practice for addressing these, we sat down with Ipsos' Global Director of Election Research, Oliviero Marchese.

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Firstly, Oliviero, what is the continued relevance of electoral polling in today's world? Why is it important?

Electoral polling is a very important activity because, arguably, it is a core part of the electoral process itself. It gives voters a voice between elections and provides them, as well as commentators and political candidates alike, with important information on how a campaign is evolving. This is especially important in today's volatile electoral environment, where voters are less likely to align themselves with any one political party and more likely to change their voting intentions over the course of a campaign, based on specific events or issue positions. Indeed, volatility has accelerated to a point where drastic changes now occur in a matter of mere hours and minutes instead of weeks, boosted by social media and 24-hour news channels. Emotional fluctuations are guiding voters' choices as never before. Time and again in recent elections, from Peru and Bolivia, to Türkiye, the Netherlands, and Slovakia, we have seen this volatility play out.

Over the past decade, what key changes and advancements have we seen in approaches to election polling?

The advent of the internet and social media has seen online and mobile polling rising to the fore. The online approach has provided more ready access to samples, decreasing costs and increasing the variety of ways in which people can be reached – from access panels and web-intercepts, to the more recent development of probability-based online panels, like Ipsos' KnowledgePanel. Online polling has also brought new challenges to the table though – for example, respondents' levels of engagement can be lower in the absence of an interviewer, with potential implications for data quality and accuracy. At the same time we have seen more traditional polling methods, like telephone and face-to-face interviewing, become less effective ways of obtaining representative samples due to access issues, as well as people's growing unwillingness to participate.

These various developments and challenges have prompted a shift towards the use of mixed-mode surveys, which most typically combine online and telephone interviewing in order to achieve 'the best of both worlds' and ensure more accurate results.
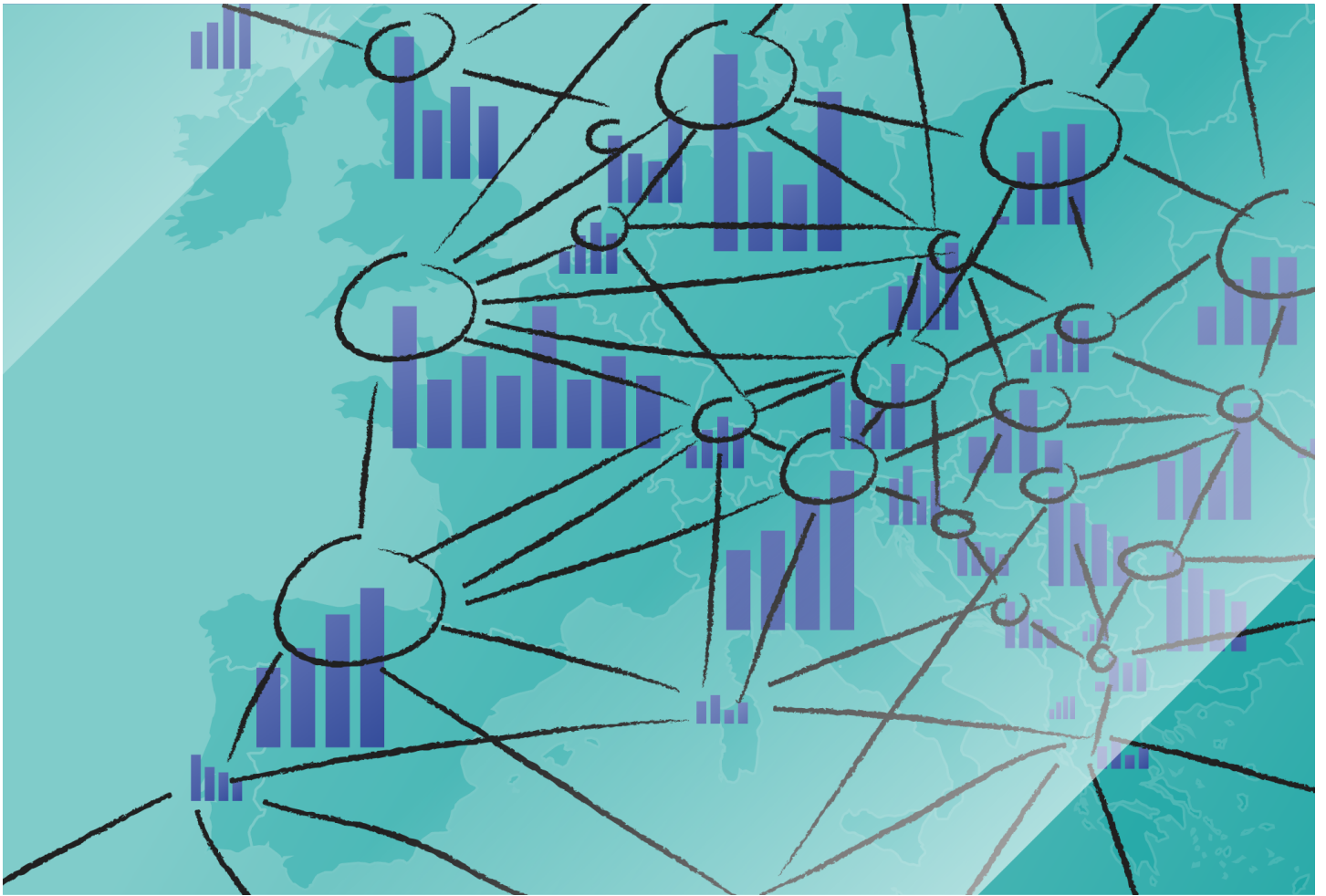
What are some of the persistent challenges we face when conducting election polling, both within the EU and globally?

Sample coverage issues continue to challenge us. In online surveys especially, we sometimes struggle to cover the most disadvantaged segments of our societies, including some young people, disadvantaged suburban dwellers, the unemployed and precarious workers. This lack of representation is not necessarily visible through the geographical and socio-demographic criteria typically applied to assess the quality and representativity of samples, such as gender, age, education or occupation, making it difficult to identify coverage gaps.

This struggle to accurately represent the general population has been exacerbated by a shift towards more fluid political values, identities and preferences among voters. As I mentioned earlier, in today's society, voting behaviour is less and less based on traditional socio-demographic factors such as social class, age, gender, or occupation, and more on issues that resonate with people's *identities and values*. Indeed, the recent rise of populist movements worldwide has shown how a shared sense of alienation and opposition to 'the establishment' can be a powerful motivator for voters, often overriding traditional party lines. Social media and the rapid spread of information (and disinformation) it facilitates, serves

to amplify issues that resonate with personal identities and values, further accelerating volatility in political preferences. All of this translates into a more nuanced and dynamic political landscape, in which predicting voter behaviour is much more complex. The shifts in voter preferences that now occur right up until the last hours of a campaign can be difficult to capture, while well-validated information comes under the pressure of the 24-hour news cycle.

Challenging indeed. Is there anything else keeping you up at night?

Another persistent challenge we face comes in the form of non-response bias – which happens when those unwilling or unable to take part in a poll systematically differ from those who do participate. This type of bias is an issue even in mixed-mode surveys, as certain demographic groups – especially young people, who often face higher rates of unemployment and job insecurity – have become less likely to respond to polls of any kind, potentially skewing results. At the same time, declining voter turnout is making it increasingly difficult to correctly identify respondents who will turn out to vote versus those who will end up abstaining. This is important because, in the end, only actual voters influence an election outcome, so pollsters need to be able to identify who those voters will be if they are to make electoral predictions accordingly.

How are Ipsos' polling experts tackling these challenges and what best practice do we recommend?

At the most general level, we always strive to conduct our political polling with the maximum degree of rigour, whilst at the same time seeing it as a continuous learning and improvement process, informed by our experiences on the more than 20 elections we cover each year.

There are certain golden rules that we believe are non-negotiable. Firstly, that all elections should be considered 'disruptive' by default, meaning that the design of any associated polling programme must be completely re-evaluated versus past elections, from the sampling and weighting approach, to the turnout modelling and the survey mode. Secondly, the timing of polls must be carefully calibrated. Our rule is that if we are polling in an election, we remain in field until the last possible moment in order to capture any late shifts. Thirdly, we believe it is crucial that the level of uncertainty associated with specific assumptions underpinning the design – such as turnout, potential sources of error, special issues related to specific segments of the electorate, etcetera – be made fully transparent.

Beyond sticking to these rules, we have been investing in techniques like turnout modelling and understanding drivers of participation, such as propensity to vote, level of interest in the election concerned, and likely degree of regret in the event of abstention. In relation to mixed-mode polling specifically, we have sought to identify the optimum calibration of the share of each data collection mode and relevant benchmarks that can be used to evaluate representativeness, in order to minimise any possible bias.

And what areas of improvement are you particularly focused on at present?

We are now moving toward a better understanding of electoral volatility by activating the Ipsos Emotions Framework in our polling. The Framework covers three different facets of emotions that are directly measurable: valence, arousal and control. Valence relates to the positive versus negative direction of an emotional response, ranging from extreme pain or unhappiness at one end, to extreme happiness at the other. Arousal refers to the degree of alertness, excitement or engagement a person feels in response to a given issue or event, ranging from none at all to frenzied excitement. Control relates to the degree of influence, power or control they feel over the issue or event. We believe that measuring these three facets as part of our polling is critical to predicting how specific emotions around campaign issues or events may impact voting intentions and in what direction.

What role is technology playing in Ipsos' election research methodology? How can advances in AI and machine learning be leveraged to enhance the process?

I'd say that machine learning in particular holds promise in terms of enabling us to better understand voting behaviour. Traditional statistical modeling of such behaviour is based on pre-determined hypotheses or theories about the data, with the main aim being to test the hypotheses and estimate the model parameters. In contrast, machine learning algorithms can learn the relationship between variables *directly from the data itself* and thus help to explore explanations of voting behaviour that may as yet have gone undetected.

Finally Oliviero, you have dedicated 35 years of your career to election polling. Could you share a particularly memorable moment or learning from this period that has stayed with you?

For me, the Brexit referendum in 2016 and the US Presidential Election the same year were pivotal moments that really brought home to me, not only the importance of polling, but the social responsibility inherent in the work. Both votes were very close and emotionally charged contests, and pollsters failed to appreciate the level of uncertainty surrounding them. The votes also laid bare the dramatic changes that were afoot in the political environment, making me more eager than ever to contribute to a better understanding of what was going on. To this day, my aim remains the same: I am proud to contribute to bringing reliable information to the public during election campaigns and, to help them make well-informed choices. I am grateful to Ipsos for having given me this opportunity!

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THE EUROPEAN UNION:
WHAT DOES IT MEAN TO CITIZENS?

Over the past few years, the European Union has been facing immense challenges, including climate change, the migration crisis, the COVID-19 pandemic and armed conflict. Some of these issues are highly polarising and have been taken up by populist parties to push nationalist anti-EU agendas. Despite this, Ipsos' research finds that the EU continues to be seen positively by its citizens, not least as a source of economic stability and democracy.

The European Union has weathered a storm of unprecedented challenges over the past five years. The coronavirus pandemic, conflicts in Ukraine and Israel/Gaza, inflation and the subsequent cost of living crisis, as well as climate change impacts, like wildfires, floods, and droughts, have profoundly shaken the bloc. Shifting demographics driven by immigration and an ageing population have only placed further significant pressure on policymakers. Amid these tumultuous changes, we also find ourselves on the brink of a fourth Industrial Revolution, powered by Artificial Intelligence (AI), a technology whose benefits and potential risks remain largely unknown. These circumstances only highlight the need for a robust and unified European Union, capable of protecting Europe's peace and prosperity.

However, the last decade has seen rising populist voices within the EU advocating nationalist ideologies. In this context, climate change and migration have emerged as especially contentious policy areas. While the EU has set ambitious targets aimed at achieving carbon neutrality by 2050, nationalist parties habitually downplay the gravity of climate change and clash with international climate change mitigation policies. To an extent, this duality is manifest in a level of ambivalence on the climate issue among the European electorate itself: While Europeans generally agree that global warming is a significant issue, they are more divided about the necessity and effectiveness of specific policies to tackle it. Indeed, debates frequently become mired in local concerns, pitting national interests against each other. Added to this, although just over half of Europeans (52%) believe climate change is an important policy area for the Union to act on, important differences are apparent by country: for example, whereas a majority of Danes see climate change as a priority area for the EU, most citizens of Eastern European countries and also of Finland do not.

The principle of free movement is a fundamental pillar of European integration. However, amidst the ongoing refugee crisis and a continuous flow of people from Ukraine and across the Mediterranean fleeing conflict and economic hardship, there is mounting political pressure within Member States to control migration. In 2023, the number of irregular

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border crossings at the EU's external border reached a total of approximately 380,000. The European Border and Coast Guard Agency Frontex recently had to admit that it was an illusion to think that the EU would be able to implement total control of its external borders to stem the flow of migrants. It is therefore not surprising that 59% of EU citizens believe that migration control should be a primary focus of European policymakers; a position that has served to fuel nationalist Eurosceptic sentiment. Again, significant variation is evident when comparing citizens' attitudes across different Member States though. For instance, people in Germany and the Netherlands are the most concerned about migration, with about two-thirds of them identifying the issue as a top European policy priority. Conversely, for people in Eastern European countries and surprisingly also in Italy, migration emerges as a lower-order concern.

European economic policies have faced their fair amount of criticism, with populist parties arguing that European regulation impedes growth and stifles competitiveness in the bloc compared to the US and China. But it is within the realm of the economy that Europeans appear to believe that the EU can have its biggest impact. Ipsos' data reveals that most Europeans think the fight against inflation should spearhead European policy efforts. In total, 68% of them take this position, with the figure holding at over two-thirds in 11 out of the 18 countries surveyed. Inflation is a driver of social inequality, with rising prices hitting lower-income households hardest. And, indeed, combating social inequality emerges as citizens' second highest priority for European policy efforts, mentioned by 64% across all countries. Driving economic growth is the third perceived most vital area of action, mentioned by 62%. This issue emerges particularly strongly among citizens in Portugal, Romania and Greece. Rising prices and a lack of growth – 'stagflation' – result in a volatile economic situation, prompting increasing inequality and unemployment. In combination, these issues constitute an economic policy imperative that the data suggests EU policymakers would do well to place centre-stage in the forthcoming legislative period.

Apart from its role in addressing such policy challenges, many Europeans appear to see the EU as an important guardian of the rule of law and democracy. Indeed, in a recent Eurobarometer Flash survey Ipsos conducted, a majority of Europeans expressed confidence in EU institutions to defend democracy in their respective countries; more than expressed confidence in national institutions to do the same. Generally, trust in EU institutions is consistently higher than in national ones. This is particularly the case in post-socialist Member States. In recent years, several of these states – including Poland and Hungary but also Slovakia – have seen their civil rights come under pressure by hardline conservatives and nationalists. Higher trust in the EU in these countries may reflect its perceived role as a guardian of such rights and democratic values more generally. Of course, trust also corresponds to an extent with perceived levels of corruption. The Eurobarometer Flash data reveals that citizens in Eastern European countries, but also in Italy, Portugal and Greece, are among the most concerned about corruption domestically. In these countries too, trust in the EU is persistently higher than in national institutions.

Historically, the EU was primarily an economic rather than a political union, creating a single market for the bloc's coal and steel industry. This echoes in the sentiment of citizens, who see economic challenges as being at the heart of European policies. While policy areas crowded with far-right ideology (especially migration) have gained importance in their minds, these areas remain less salient EU-level concerns for them than more materialist ones. Instead, issues often associated with centrist ordoliberal positions – strong democratic institutions, economic growth and prosperity while ensuring high levels of employment and social equality – figure at the top of European citizens' wish list. This may play into the hands, not of populist nationalists, but rather the centre-right, during the forthcoming European election.

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THE 'EUROPEANISATION' OF EU ELECTIONS: MYTH OR REALITY?

Traditionally regarded by experts as mere patchworks of disparate national ballots, are European elections gradually becoming occasions when distinctly pan-European political trends can be discerned?

After the first European elections in 1979, two German academics, Karlheinz Reif and Hermann Schmitt, wrote an article with a revealing title: 'Nine second-order national elections'. They argued that voter behaviour in European elections was primarily anchored in *national-level* preoccupations and priorities, including socio-economic circumstances and the relative popularity of political parties and leaders.

This conception of European elections as 'second-order' elections provides one explanation why, during the first four decades of the ballot's existence, distinctly *European* patterns of voting were difficult to discern. However, the 2019 election saw a change in this regard, with two clear pan-European trends emerging.

Firstly, there was a notable rise in voter turnout (up by 8.1 percentage points on 2019 to 50.7%, the highest level recorded since 1994). This was observed in most major countries with the sole exception of Italy (where turnout fell slightly, by 2.7 percentage points).

Secondly, the 2019 ballot saw a surge of support for Green parties in countries where they had already broken through as credible political players. In Ireland, for example, support for green candidates rose by over six percentage points, while in Germany, the UK, the Netherlands and France, increases of between three and six percentage points were observed. Overall, the *Greens/EFA* group in the European Parliament secured a record 74 MEPs, 24 more than in the previous European election.

These emergent pan-European electoral trends have been linked to several important developments. Firstly, the gradual

Number of Green Group members at the constitutive session of each European Parliament since 1979
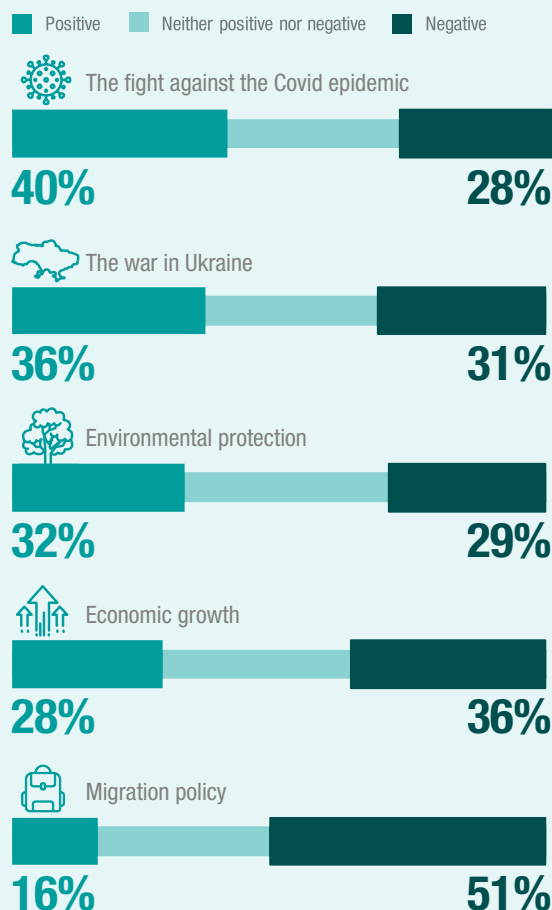

1979	1984	1989	1994	1999	2004	2009	2014	2019
0	20	30	23	48	42	55	50	74
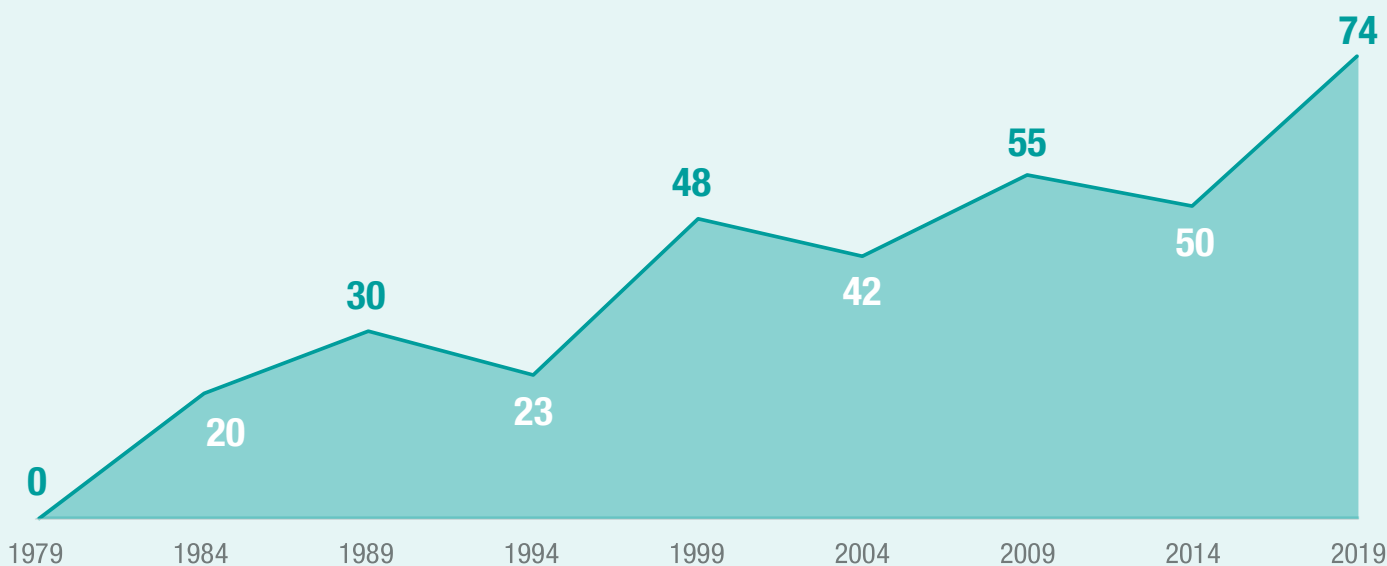
Source: European Parliament election results

– albeit still nascent – Europeanisation[1] of the campaign, evident in the emergence of European televised debates during the 2019 elections, and the designation of candidates for the presidency of the European Commission – the *Spitzenkandidaten* – by European political parties. Secondly, voters now appear to be paying greater attention to what might be deemed peculiarly European dimensions of the ballot. Indeed, unlike the sometimes obscure or complex propositions offered during past European elections (for example, the Schengen area in the 1990s and Eurobonds in 2014), recent crises – from COVID-19, to climate change, immigration and the war in Ukraine – and the EU-level management of these, have enabled voters to see that the European Union can have a concrete, and sometimes even positive, impact on their daily lives. Indeed, our recent polling for Euronews shows that a majority of Europeans feel the European Union has had a more positive than negative impact over the last five years on several of the aforementioned issue dimensions. For example, 40% believe it has had a positive impact on the fight against COVID-19, versus 28% who feel it has had a negative impact; and 36% believe it has had a positive impact on the war in Ukraine, versus 31% who feel the opposite. Opinion is more mixed when it comes to the EU's impact on the environment and the economy, and predominantly negative when it comes to the migration issue. Still, overall the data does indicate that the European Union is now seen as more relevant by citizens than has been the case in the past. Put another way, while the national context will continue to have an important influence on Europeans' voting behaviour in EU elections, it may now be just one dimension playing into their decision-making.

The trend towards Europeanisation is still very much in the making, however. Our polling for Euronews also indicates that,

Perceived impact of the European Union on key issue areas

Legend: ■ Positive   ■ Neither positive nor negative   ■ Negative

The fight against the Covid epidemic
40% — 28%

The war in Ukraine
36% — 31%

Environmental protection
32% — 29%

Economic growth
28% — 36%

Migration policy
16% — 51%

Source: Euronews-Ipsos poll in 18 EU countries | **Fieldwork:** 23 February-5 March 2024 | **Base:** n=25,916 - All respondents

for the most part, the results of the forthcoming European election will be heavily influenced by some key national party political dynamics. This is perhaps best illustrated with reference to our projections for how the radical right is likely to perform in the ballot. On the one hand, it is true that the two radical right-wing groups look set to gain ground at the European level: the *Identity and Democracy* (*ID*) group could claim 81 MEPs (up from 59 currently), and the *European Conservatives and Reformists* (ECR) group could claim 76 (up from 68). This would mean that, in total, these two radical right groups would represent more than a fifth (21.8%) of all elected members of the European Parliament (compared to just 18% in 2019, 15.7% in 2014, 11.8% in 2009 and 8.7% in 2004).

But this improved performance, if realised, would mostly be linked to breakthroughs in a few countries, notably France, in the form of a very strong performance by the *National Rally* (*Rassemblement National*) and the possible arrival in Brussels of *Reconquête* MEPs; and in Romania, with the election of radical right MEPs from *the Alliance for the Union*

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[1] The gradual development of common electoral behaviour at European level in EU elections, overlaying the purely national dimensions of voting that were largely predominant until recently.
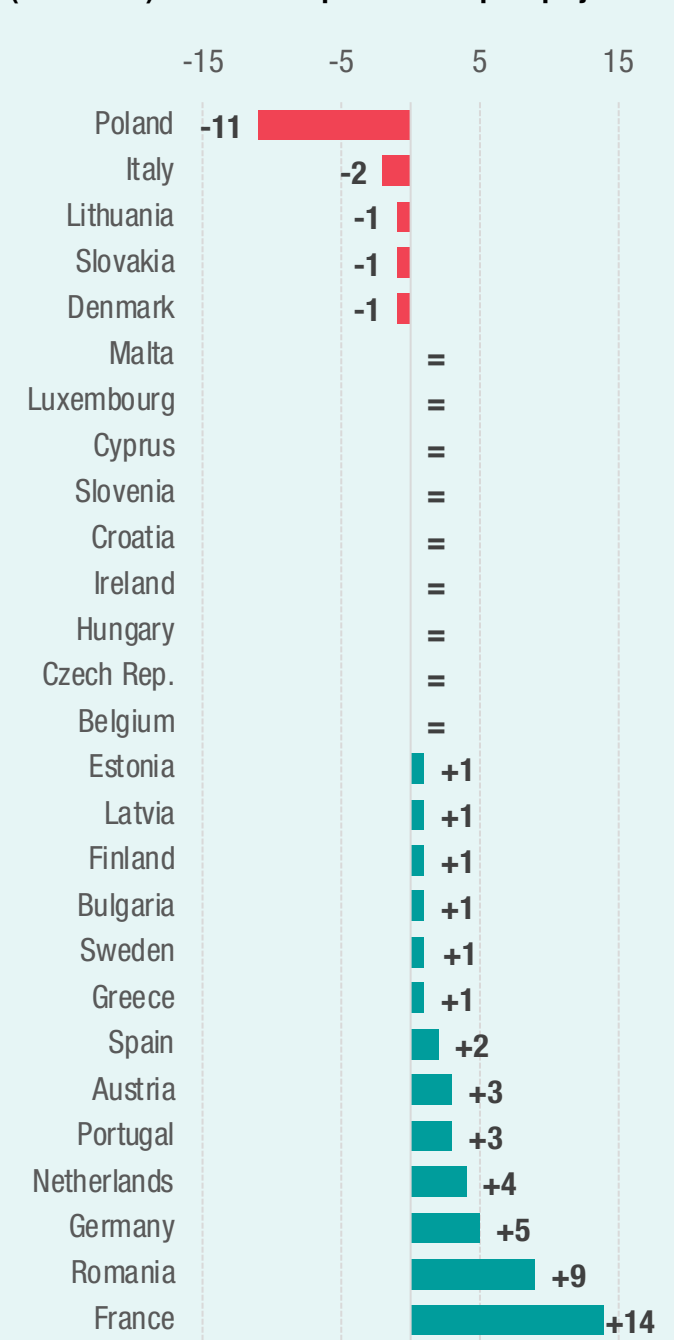
of Romanians (*AUR*) and *S.O.S. România* parties. Noticeable improvements in the performance of such parties are also likely, to a lesser extent, in Germany and the Netherlands. More generally, though, the radical right's rise is unlikely to be a consistent feature of the ballot across Europe. In Italy, for example, the group is stagnant: while Giorgia Meloni's *Brothers of Italy* party (*Fratelli d'Italia*) is making strong progress, this is mainly at the expense of another radical right party (Matteo Salvini's *Lega*). In Poland, the *Law and Justice* party (*PiS*), which lost power in last October's parliamentary elections, is reported to be in sharp decline. And in other countries, like Ireland, the far-right will likely remain marginal and fail to secure any seats at all.

Such national differences are similarly evident in our projections for other parliamentary groups too. The *Greens/ EFA* group looks likely to go from having 74 MEPs to only 55, mainly due to sharp drops in support for the German Greens (*Grünen*) and the French *Ecologists* (*Les Ecologistes*) lists. Elsewhere, support for the Greens looks more stable. As for the liberal and centrist *Renew* group, this too looks set to experience heavy losses (going from 108 MEPs to a projected 85), primarily due to the erosion of the *Renaissance* list supported by Emmanuel Macron, and the disappearance of the *Citizens Party* (*Ciudadanos*) in Spain. However, the number of *Renew* MEPs could also *increase* in a few countries, especially Poland, thanks to the likely success of the centrists from the *Poland 2050* party (*Polska 2050*).

In sum, while a gradual Europeanisation of voter behaviour during EU-level elections appears to be emerging in connection with the growing importance of European policies in citizens' daily lives, this trend remains in its infancy: our projections suggest that the widely anticipated rise of radical right-wing parties will not be seen on the same scale from one country to another, and, indeed, will simply not be a feature of the ballot in a significant number of countries. Perhaps then, only following future European elections, in 2029 and beyond, will we be able to draw conclusions as to whether the gradual Europeanisation of the ballot is a trend that is likely to continue, or one that can more accurately be characterised as a short-term, event-driven phenomenon.

**Number of MEPs from the two far-right groups (ECR and ID) - current composition and Ipsos projection**

Country	Change
Poland	-11
Italy	-2
Lithuania	-1
Slovakia	-1
Denmark	-1
Malta	=
Luxembourg	=
Cyprus	=
Slovenia	=
Croatia	=
Ireland	=
Hungary	=
Czech Rep.	=
Belgium	=
Estonia	+1
Latvia	+1
Finland	+1
Bulgaria	+1
Sweden	+1
Greece	+1
Spain	+2
Austria	+3
Portugal	+3
Netherlands	+4
Germany	+5
Romania	+9
France	+14

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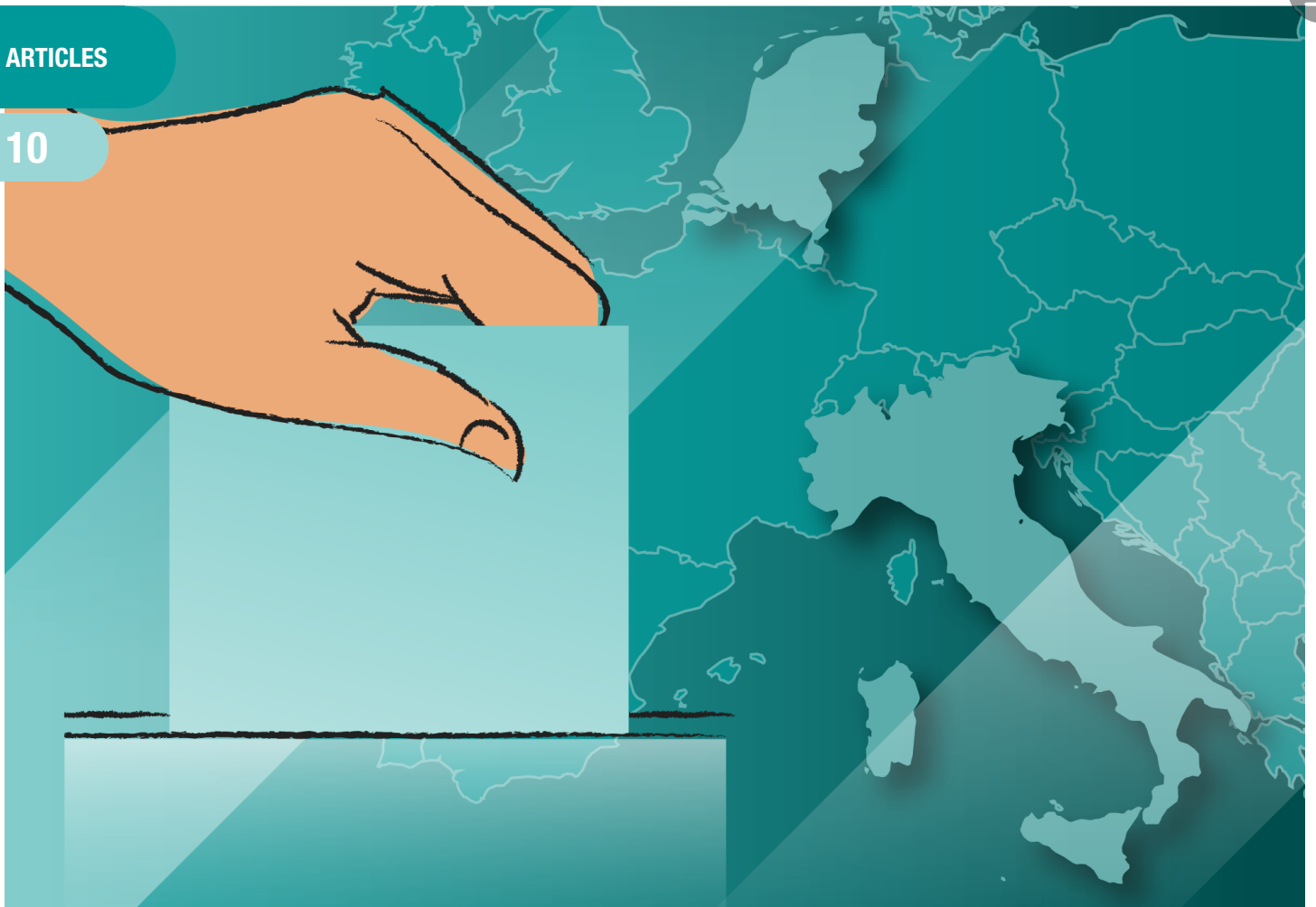
A NEW FORM OF POLARISATION IN THE EUROPEAN UNION?
UNDERSTANDING THE RADICAL RIGHT THROUGH THE LENS OF DUTCH AND ITALIAN POLITICS

In the run-up to the 2024 European Parliament (EP) elections, there has been much talk about the electoral rise of the radical right. As noted elsewhere in this digest, Ipsos polling indicates that the performance of these parties is likely to differ heavily across countries. Still, the European Conservatives and Reformists (ECR) Group and the Identity and Democracy (ID) Group look set to improve their electoral strength in June. In addition, many Member States have recently seen radical right parties making gains in national elections (for example, Portugal and the Netherlands). Parties in the centre, most notably the European People's Party Group (EPP), are responding to this electoral threat by (1) addressing the issues put forward by radical right parties (especially migration and green issues), and (2) shifting their positions on these issues towards the radical right). EPP lead Ursula von der Leyen, in her speech to the party conference earlier this year, signaled

a tougher stance on migration and asylum issues, and sought to woo discontented European farmers by emphasising the centre-right's rural credentials ("EPP will always be by the side of our farmers"). Undoubtedly, the goal was to take the wind out of the sails of the radical right. This type of 'accommodative strategy' is a risky one, however. Political science studies show that it can legitimise the radical right, potentially resulting in an electoral boost for these parties. Voters in the end, as Jean-Marie Le Pen famously put it, prefer the original to the copy.

This article takes a closer look at the political dynamics between radical right 'challenger' parties and mainstream centre parties in Europe by focusing in on two national-level cases where radical right parties have gained momentum: the Netherlands and Italy.

LESSONS FROM THE NETHERLANDS: WHAT EUROPEAN CENTRE PARTIES CAN LEARN FROM WILDERS' WIN IN THE 2023 DUTCH GENERAL ELECTION

The Dutch national election in November 2023 saw a radical right anti-migration party come out on top. Geert Wilders' *Partij Voor de Vrijheid (PVV)* won the general election, taking 37 out of the available 150 seats. The results took many in the Netherlands and beyond by surprise. The Guardian described the result as a 'Brexit moment' for the Dutch, while CNN called it a 'Trump moment'.

The *PVV* victory should mainly be understood in light of the electoral strategy of the centre-right, particularly the conservative liberals of the *People's Party for Freedom and Democracy*. Under the leadership of prime minister Mark Rutte (*VVD*, 2006-2023), the party emphasised migration issues and shifted its position towards a more restrictive migration and asylum policy. In addition, Rutte had, since 2012, consistently ruled out forming coalitions with the *PVV*, saying the party was "too extreme".

However, during the 2023 national election campaign, Rutte's successor as leader of the *VVD* Yeşilgöz-Zegerius changed the party's strategic course, and said it now considered Geert Wilders' *PVV* a viable potential partner in government – a move that has been widely seen as having made the *PVV* more socially acceptable and a more attractive choice for rightwing voters. In the 2021 election campaign, only 12% of *VVD* voters said they considered *PVV* a possible partner in government. In 2023, this more than doubled to 30%.

Two more factors helped propel the *PVV* to power. First, migration was a leading issue in the campaign from the outset (See chart below). The 2023 general election came after the ruling coalition had found itself unable to agree on a migration policy deal – again, the *VVD* had pushed its coalition partners to more restrictive asylum measures. Second, in the wake of several scandals over recent years, trust in politics in the Netherlands had hit a record low.

This created a perfect storm for the 'Dutch Donald Trump'. Migration had become a vital issue; many voters had been disappointed with the established political parties; and the centre-right removed a blockade to government.

Although some specific peculiarities of the Dutch case help

Most important issue for right-wing voters in the Netherlands (Ipsos polls) July – November 2023
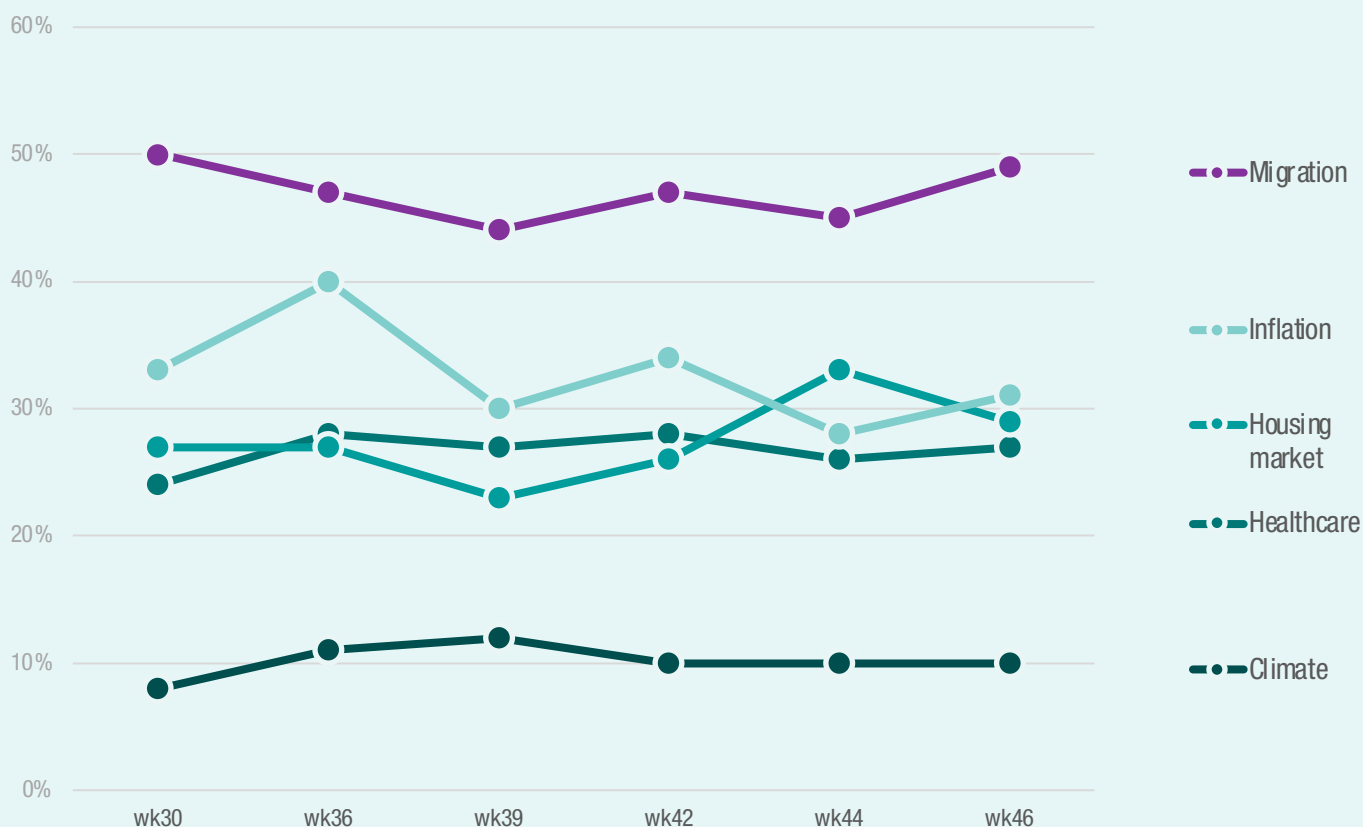
explain the shock election result in 2023, there are lessons to be learnt for the European centre parties as well. First, the Dutch case illustrates how campaigning on issues of the radical right – most notably migration – increases the salience of these issues to voters. During the 2021 Dutch national election campaign, Ipsos polling found that the migration issue was far less salient to voters than has been the case more recently. Second, in many countries, including in the Netherlands, radical right parties are seen as 'issue owners' on migration. Hence, if migration becomes the issue of the day, parts of the electorate are tempted by the radical right. Third, signaling to voters that the radical right party is a potential partner in coalitions runs the risks of further legitimising these parties.

In all, the Dutch case shows how presenting a watered-down version of the agenda of challengers on the fringes of the political spectrum is likely to backfire electorally for mainstream parties. Instead, offering distinctive policy alternatives might be a more viable long-term strategy for the political centre.

THE ITALIAN CASE: FROM A 'CENTRE-RIGHT' TO A 'RIGHT-CENTRE' COALITION

Although the past few decades have often seen European centre-right (EPP) and centre-left (S&D) party groupings converge into broad majorities supportive of the European Commission, in most EU Member States the two groupings have continued to face each other in a traditional left-right political confrontation. Until relatively recently, the Italian case has proven no exception. However, the period since the 2018 election has seen a transformation take place in the centre-right coalition, characterised by a decline in the consensus towards the 'centre' (represented by Silvio Berlusconi's *Forza Italia*) and the rise of radical right parties – the *Lega* in the 2018 general election and, more notably, Giorgia Meloni's *Fratelli d'Italia* in the 2022 general election, leading experts to talk of a new "right-centre" coalition.

Political bipolarism characterised the Italian political system during the so-called 'Second Republic', born in the early 1990s following three main political events. Firstly, the failure of the traditional parties that had ruled the country since WWII (the *Democrazia Cristiana* and the *Partito Socialista Italiano*, together with other, minor parties), following the *Mani Pulite* investigation into political corruption in Italy. Secondly, the adoption of a new electoral system with a strong majoritarian component. Thirdly, the appearance on the political scene of Silvio Berlusconi, leading the new centre-right party *Forza Italia*.

From the 1994 election until 2011, Berlusconi lead a centre-right coalition with an unchanging composition: his own *Forza Italia* party (that joined the EPP in 1998), the right-wing *Alleanza Nazionale* (a member of the now defunct Alliance for Europe of the Nations), the Northern-Independentist *Lega* (previously a member of the European Alliance for Freedom, now part of the Identity and Democracy group), and other smaller parties.

Over the course of eight national elections (in 1994, 1996[1], 2001, 2006, 2008, 2013, 2018, 2022), this centre-right coalition faced a centre-left one formed by progressive, communist, post-communist, green, and "leftist Christian-democratic" parties. In the interim, some other small coalitions tried to break this bipolar structure of political competition (notably the *"Con Monti per l'Italia"* centrist coalition in 2013 and the *"Terzo Polo"* centrist coalition in 2022), but were largely unsuccessful in doing so.

However, the populist *Movimento 5 Stelle* (M5S), founded by the comedian Beppe Grillo in 2009, succeeded in playing a major role in Italian politics *outside* of the two main coalitions. M5S' electoral successes in 2013 and 2018 had a significant effect on Italian bipolarism, forcing centre-left and centre-right parties to form joint majorities (in 2013-2018) or experiment with new coalitions – M5S with Matteo Salvini's *Lega* in 2018-2019 and with the Democratic Party in 2019-2021.

An important corollary of all of this was that the 2018 general election saw *Forza Italia* lose the leadership of the centre-right coalition for the first time in 24 years. They were succeeded initially by Salvini's *Lega* in 2018 and later by Giorgia Meloni's *Fratelli d'Italia* in 2022, when Meloni was named the new President of the Council of Ministers. The success of these two right-wing parties in the most recent national level-elections[2] has led analysts to view the current centre-right coalition as more of a 'right-centre' one (see Improta, Trastulli 2022; Newell 2023).

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[1] When *Lega* ran alone, outside of the centre-right coalition.
[2] *Lega* obtained 34.3% at the 2019 European election, *Fratelli d'Italia* 26.0% at the 2022 general election.

This shift towards the radical right in Italy is likely to have resulted from a combination of several factors. Some of these are peculiar to the Italian national context: the decline of Silvio Berlusconi and his *Forza Italia*, voter disappointment with the politics of the M5S-led cabinets, and rising disaffection among Italians with cabinets formed through party agreements at parliamentary level without an electoral mandate[3] (and with the participation of the centre-left Democratic Party). Some other factors are common to other European countries and to Western societies more broadly, including rising concern about immigration, security, and other issues typically considered at the core of right-wing parties' agendas; and a level of dissatisfaction with international and supranational institutions (the EU included) among some voter segments.

At the European level, the possibility of a similar centre-right (or right-centre) coalition emerging in the forthcoming EP election does not seem realistic, based on our latest polling data. Nonetheless, the growing relevance of the radical right will put pressure on mainstream parties, most likely producing a more heavily politicised EU Parliament. The Italian case shows how this confrontation could see the centre-left or progressive pole no longer facing a 'traditional' centre-right or conservative one, but rather a coalition led by right-wing or radical right political forces.

CONCLUSION

The campaign for the 2023 general election in the Netherlands showed the extent to which the electoral success of radical right parties is shaped by the behaviour of mainstream parties. By taking up the issues of the radical right, established centre parties signal to voters that these issues mattered and effectively increased the salience of the radical right's agenda. The Dutch centre right party further legitimised the radical right by explicitly considering them as viable coalition partners early in the campaign. In Italy, the alliance between the centre right and the radical right has already progressed much further. The centre of gravity within the coalition has changed: it is no longer seen as a centre-right coalition, but rather as a right-centre political movement.

Taken together, the Dutch and Italian experiences underscore the critical role of mainstream party strategy in the electoral success of radical right parties. At the level of EU politics, the European People's Party Group (EPP), confronted with a potential electoral rise of the radical right, finds itself at a crossroads. Its strategic choices in the campaign for the upcoming EP elections could shape the political dynamics of EU politics for years to come.

[3]Between 2011 and 2021 all the Italian Prime Ministers (Mario Monti, Enrico Letta, Matteo Renzi, Paolo Gentiloni, Giuseppe Conte, Mario Draghi) had not been proposed for that position at the previous general election.

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MORE EUROPEAN ELECTION RESEARCH AND INSIGHTS FROM ACROSS IPSOS

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A European election survey
three months ahead of the June 2024 European elections
March 2024

euronews.

From Belgium

Conducted on behalf of Het Laatste Nieuws (HLN), this recent poll of first-time voters in Flanders found that over half of them did not yet know who they would vote for in the European elections - though young men were predominantly inclined towards the extreme right, whereas young women were polarised between the extreme left and the extreme right.

From France

This poll, carried out on behalf of Radio France and Le Parisien, confirmed a significant lead for the National Rally *(Rassemblement National)* in the run up to the European elections, as well as a significant narrowing of the gap between the Emmanuel Macron-backed list and the Socialist list.

From Germany

Ipsos conducts a monthly survey in Germany to gauge public satisfaction with the country's politicians and current voting intentions. This report summarises latest insights from the survey in the lead up to the European elections, including the degree of polarisation surrounding key political issues.

From the Netherlands

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ELECTIONS BEYOND THE EUROPEAN UNION
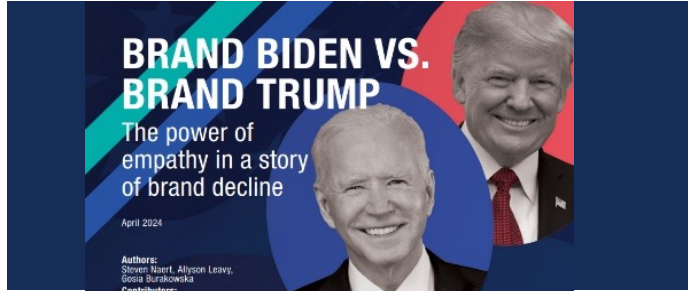
US PRESIDENTIAL ELECTION

US Presidential approval tracker

The [Reuters/Ipsos Core Political survey](#) tracks President Joe Biden's approval ratings and public opinion on critical issues facing the USA ahead of November's Presidential election. The latest results show that, while Biden's approval rating remains stable, two in three Americans believe the country is on the wrong track.

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