

# A European election survey

three months ahead of the June 2024 European elections

March 2024

euronews.



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# KEY FINDINGS

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## #1 A rise, but no wave

The radical right would make significant progress in the European Parliament, gaining more than one-fifth of MEPs for the first time - but the extent of its increase would vary greatly from country to country.

## #2 Still the European "grand coalition"?

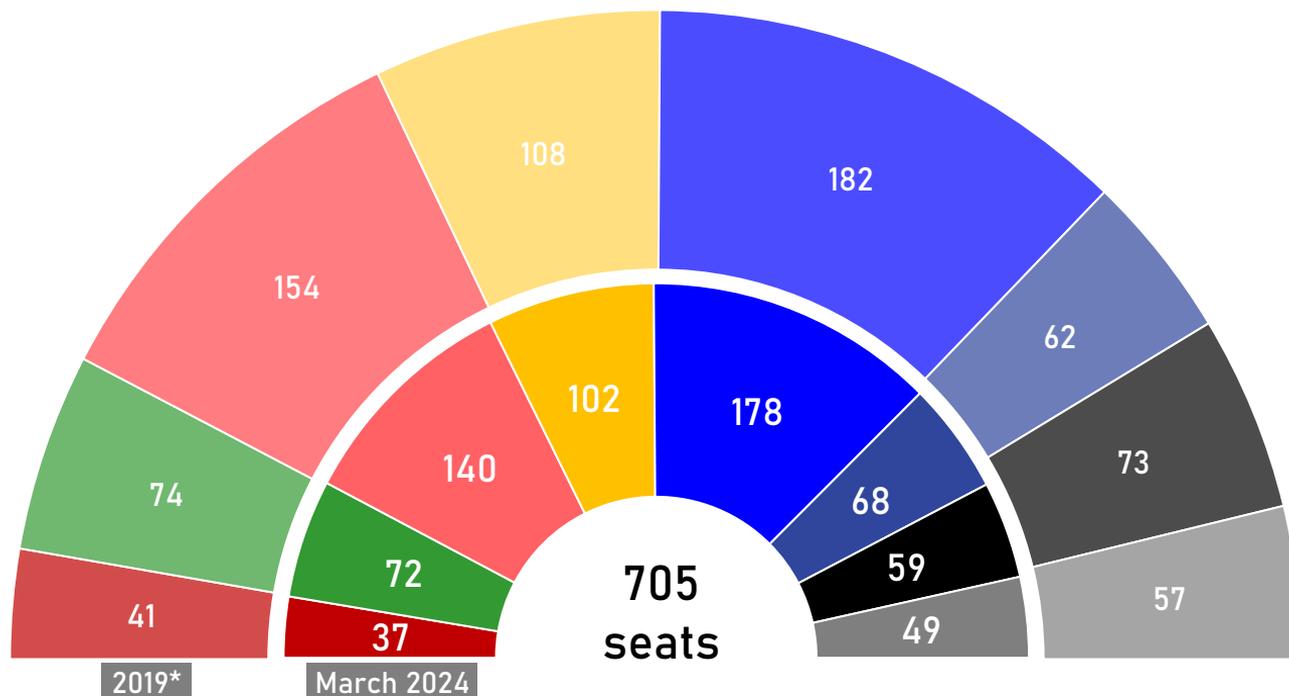
Only a coalition between the conservatives, social democrats and liberals could have a stable majority - although alternative *ad hoc* majorities could be found on some legislation.

## #3 Many uncertainties

However, this projection is subject to a number of unknown factors, including the attitude of MEPs from the non-attached group, and changes in groups after the elections.

# The projected composition of the next European Parliament

# THE EVOLUTION OF THE COMPOSITION OF THE EU PARLIAMENT SINCE 2019



■ The Left in the European Parliament - GUE/NGL  
■ Greens/European Free Alliance  
■ Progressive Alliance of Socialists & Democrats  
■ Renew Europe

■ European People's Party Group  
■ European Conservatives & Reformists  
■ Identity & Democracy  
■ Non-inscrits (non-attached members)

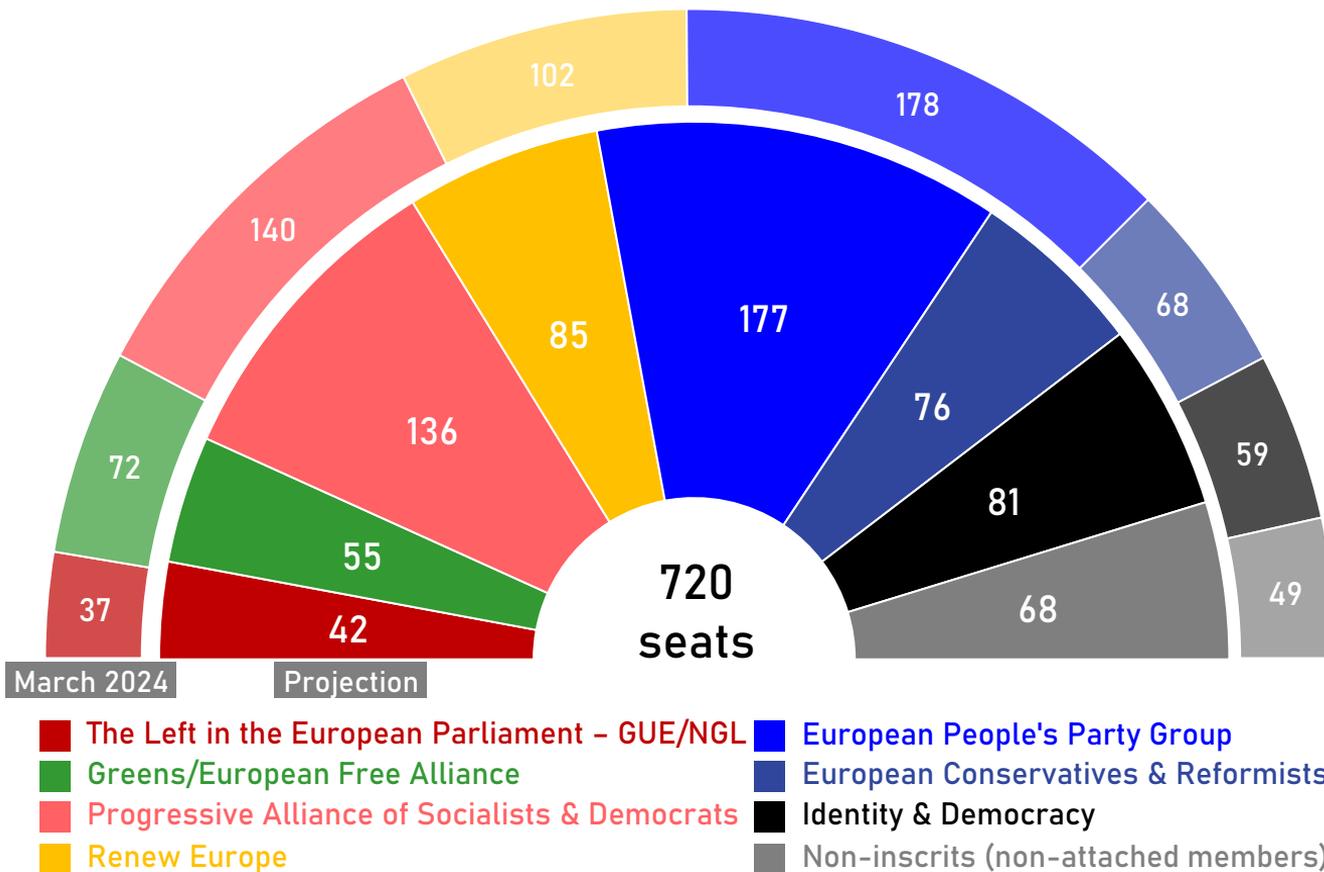
\* Composition at the constitutive session of the ninth European Parliament (2<sup>nd</sup> July 2019)

The composition of the European Parliament has significantly changed between the June 2019 election and today. The number of MEPs has decreased overall: the Brexit in June 2020 reduced the number of seats from 751 to 705, and the reapportionment in June 2023 means that we will elect 720 MEPs in June.

Two groups also lost a significant number of MEPs in 5 years:

- the radical right ID group, notably due to the transfer of some Lega and RN MEPs to Fratelli d'Italia and Reconquête respectively as well as the change of group for the Finns Party, who joined the ECR group;
- and the S&D group, mainly as a result of the withdrawal of the British Labour MEPs and the suspension of the Slovak SMER.

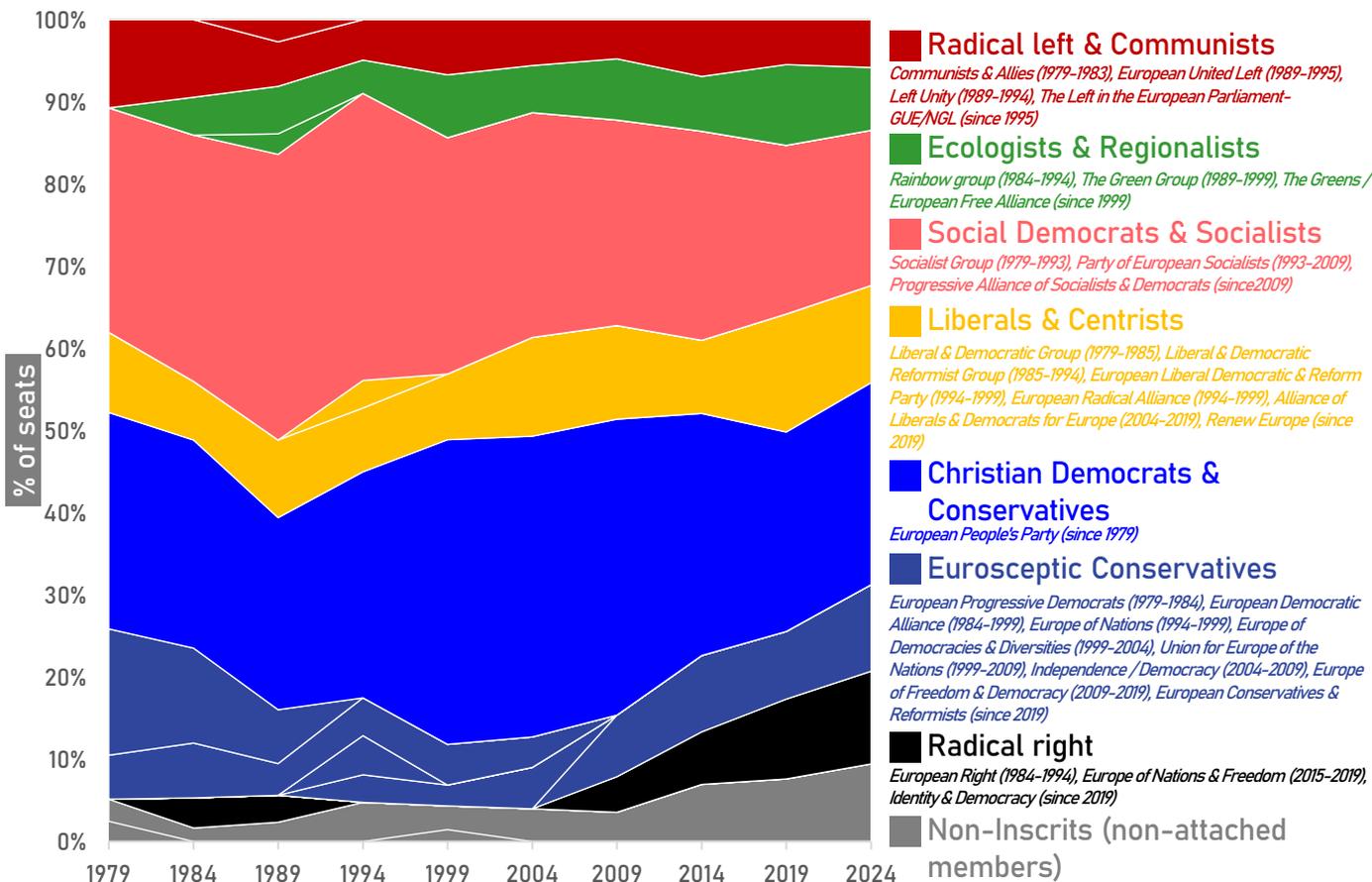
# THE PROJECTED COMPOSITION OF THE NEXT EU PARLIAMENT



Our projection shows that the ID group is likely to be significantly strengthened after next June's elections: it would obtain 81 MEPs, virtually tied for third place with the Renew group (85 MEPs, down significantly) and the ECR group (76 MEPs, up slightly). Alongside the Renew group, the other group that would see its number of MPs significantly reduced is the Greens/EFA group (55 MEPs). The other groups would be maintaining their positions (EPP, S&D) or rising very slightly (The Left).

Generally speaking, while our projection does point to a clear increase in the number of MEPs for the two radical right-wing groups (ECR and ID) in the European Parliament, there is no wave in their favor.

# THE EVOLUTION OF THE COMPOSITION OF THE EU PARLIAMENT

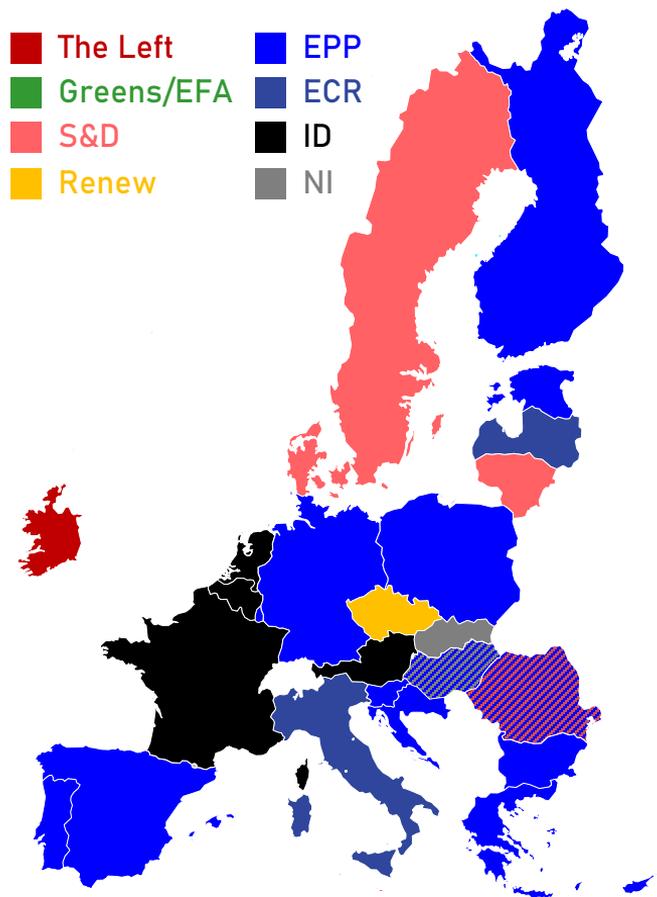


- Radical left & Communists**  
*Communists & Allies (1979-1983), European United Left (1989-1995), Left Unity (1989-1994), The Left in the European Parliament-GUE/NGL (since 1995)*
- Ecologists & Regionalists**  
*Rainbow group (1984-1994), The Green Group (1989-1999), The Greens / European Free Alliance (since 1999)*
- Social Democrats & Socialists**  
*Socialist Group (1979-1993), Party of European Socialists (1993-2009), Progressive Alliance of Socialists & Democrats (since 2009)*
- Liberals & Centrists**  
*Liberal & Democratic Group (1979-1985), Liberal & Democratic Reformist Group (1985-1994), European Liberal Democratic & Reform Party (1994-1999), European Radical Alliance (1994-1999), Alliance of Liberals & Democrats for Europe (2004-2019), Renew Europe (since 2019)*
- Christian Democrats & Conservatives**  
*European People's Party (since 1979)*
- Euroceptic Conservatives**  
*European Progressive Democrats (1979-1984), European Democratic Alliance (1984-1999), Europe of Nations (1994-1999), Europe of Democracies & Diversities (1999-2004), Union for Europe of the Nations (1999-2009), Independence / Democracy (2004-2009), Europe of Freedom & Democracy (2009-2019), European Conservatives & Reformists (since 2019)*
- Radical right**  
*European Right (1984-1994), Europe of Nations & Freedom (2015-2019), Identity & Democracy (since 2019)*
- Non-Inscrits (non-attached members)**

The radical right's progression at European level is clear in the long term. While MEPs from right-wing eurosceptic and far-right groups accounted for just 8.7% of all MEPs 20 years ago, this figure rose steadily after the 2009 (11.8%), 2014 (15.7%) and 2019 (18%) elections. Our projection shows that this year, for the first time, they could represent more than a fifth (21.8%) of the members of the European Parliament.

The two major losers of are the EPP (Christian democrats and Conservatives) and S&D (Social democrats) groups. The former, which represented 36.6% of the MEPs in 2004, is expected to represent only 24.6% after the June elections. As for the Social Democrats, they would go from 27.3% to 18.9% of the seats in 20 years.

# THE LEADING POLITICAL PARTY BY COUNTRY



	Leading party	Group
Germany	Union (CDU-CSU)	EPP
France	National Rally (RN)	ID
Italy	Brothers of Italia (Fdl)	ECR
Spain	People's Party (PP)	EPP
Poland	Civic Coalition (KO)	EPP
Romania	National Coalition (CNR)	S&D-EPP
Netherlands	Party for Freedom (PVV)	ID
Belgium	Vlaams Belang (VB)	ID
Greece	New Democracy (ND)	EPP
Czech Rep.	ANO 2011	Renew
Sweden	Social Democratic Party (SAP)	S&D
Portugal	Social Democratic Party (PSD)	EPP
Hungary	Fidesz - KDNP	NI-EPP
Austria	Freedom Party of Austria (FPÖ)	ID
Bulgaria	GERB-SDS	EPP
Denmark	The Social Democrats (S)	S&D
Finland	National Coalition Party (KOK)	EPP
Slovakia	Direction-Social Democracy (Smer-SD)	NI
Ireland	Sinn Féin (SF)	The Left
Croatia	Croatian Democratic Union (HDZ)	EPP
Lithuania	Social Democratic Party Lithuania (LSDP)	S&D
Slovenia	Slovenian Democratic Party (SDS)	EPP
Latvia	The National Alliance (NA)	ECR
Estonia	Fatherland (Isamaa)	EPP
Cyprus	The Democratic Rally (DISY)	EPP
Luxembourg	Christian Social People's Party (CSV)	EPP
Malta	Labour Party (PL)	S&D

Leading in terms of seats in the European Parliament according to our projection, the EPP group would also come first in the largest number of countries of the European Union: 12 out of 27, including large countries such as Germany, Spain or Poland. Although it would clearly come in second in terms of MEPs, the S&D group would only dominate in 4 countries, notably in Northern Europe. The ID group would do just as well by coming first in 4 countries, including France. If the other radical-right group (ECR) only comes first in two countries, Italy would be among them. The Renew and Left groups would only come first in one country each, and the Green/EFA group in none.

# THE DETAILED SEATS PROJECTION BY COUNTRY

Country	Total number of MEPs	The Left	Greens/EFA	S&D	Renew	EPP	ECR	ID	NI
Germany	96	5 =	15 -10	16 =	7 =	28 -2	0 -1	15 +6	10 +7
France	81	6 =	7 -5	11 +4	17 -6	7 -1	5 +4	28 +10	0 -4
Italy	76	2 +2	2 -1	17 +1	0 -4	8 -4	24 +14	7 -16	16 +8
Spain	61	5 -1	4 +1	19 -2	1 -8	25 +12	6 +2	0 =	1 -2
Poland	53	0 =	0 -1	4 -3	5 +4	21 +5	16 -11	0 =	7 +7
Romania	33	0 =	0 -1	10 +1	4 -3	8 -6	8 +7	2 +2	1 =
Netherlands	31	2 +1	5 +2	3 -3	7 =	5 -1	0 -5	9 +9	0 -1
Belgium	22	3 +2	2 -1	4 +2	4 =	3 -1	3 =	3 =	0 -1
Greece	21	5 +1	0 -1	3 +2	0 -1	8 +1	2 +1	0 =	3 -3
Czech Rep.	21	1 =	3 =	0 -1	7 +2	5 =	3 -1	2 +1	0 -1
Sweden	21	2 +1	2 -1	6 +1	2 -1	5 -1	4 +1	0 =	0 =
Portugal	21	1 -3	0 -1	8 -1	1 +1	8 +1	0 =	3 +3	0 =
Hungary	21	0 =	0 =	4 -1	2 =	1 =	0 =	0 =	14 +1
Austria	20	0 =	3 =	5 =	2 +1	4 -3	0 =	6 +3	0 =
Bulgaria	17	0 =	0 =	2 -3	5 +2	6 -1	0 -2	3 +3	1 +1
Denmark	15	1 =	2 =	4 +1	4 -2	3 +2	0 =	0 -1	1 +1
Finland	15	1 =	1 -2	4 +2	2 -1	4 +1	3 +1	0 =	0 =
Slovakia	15	0 =	0 =	0 -1	5 +1	2 -2	0 -1	0 =	8 +4
Ireland	14	5 +1	1 -1	1 +1	3 +1	4 -1	0 =	0 =	0 =
Croatia	12	0 =	2 +2	3 -1	0 -1	5 +1	0 -1	1 +1	1 -1
Lithuania	11	0 =	4 +2	3 +1	1 =	2 -2	0 -1	0 =	1 =
Slovenia	9	1 +1	0 =	1 -1	2 =	5 +1	0 =	0 =	0 =
Latvia	9	0 =	1 +1	1 -1	1 =	1 -2	2 +1	0 =	3 +2
Estonia	7	0 =	0 =	1 -1	2 -1	2 +1	0 =	2 +1	0 =
Cyprus	6	2 =	0 =	1 -1	0 =	2 =	0 =	0 =	1 +1
Luxembourg	6	0 =	1 =	2 +1	1 -1	2 =	0 =	0 =	0 =
Malta	6	0 =	0 =	3 -1	0 =	3 +1	0 =	0 =	0 =

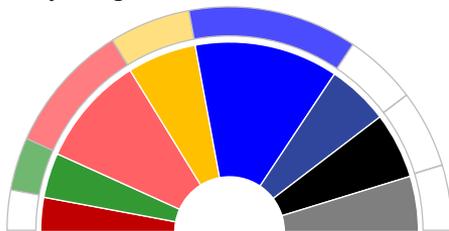
\* Evolution compared to the present composition of the EU Parliament (March 2024)

The country-by-country breakdown of our projection shows significant shifts within the European right: while in most countries, the radical right is growing at the expense of the EPP group, in some countries, such as Poland, the trend is the opposite. In Spain, the conservatives (PP) are making progress, but so are the radicals (Vox). In Italy, transfers are taking place within the radical right: the Lega is seeing a large proportion of its 2019 electorate vote for Fratelli d'Italia this year.

Also noteworthy is the significant decline of the Green parties in Germany and France (-10 and -5 seats), which partly explains the fall of the Greens/EFA group in our projection.

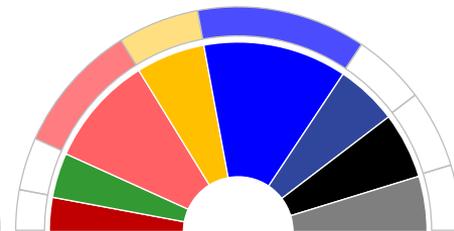
# THE POTENTIAL COALITIONS IN THE NEXT EU PARLIAMENT

## Super grand coalition



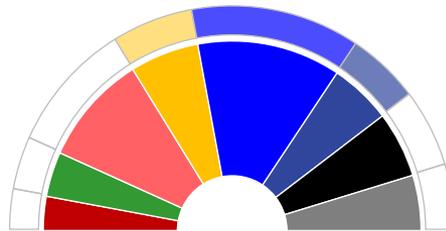
This coalition would have 453 seats out of 720, which represents a majority (62.9% of the seats).

## Grand coalition



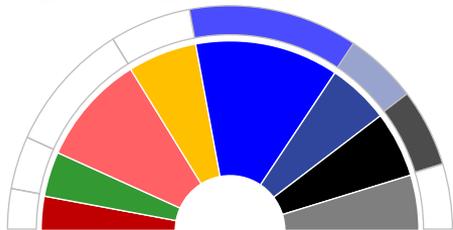
This coalition would have 398 seats out of 720, which represents a majority (55.3% of the seats).

## Center-right coalition



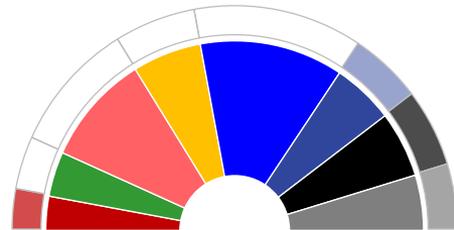
This coalition would have 338 seats out of 720, which represents a minority (46.9% of the seats).

## Right-wing coalition



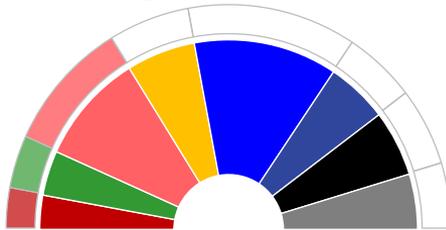
This coalition would have 334 seats out of 720, which represents a minority (46.4% of the seats).

## Euro-critic coalition



This coalition would have 267 seats out of 720, which represents a minority (37.1% of the seats).

## Left-wing coalition



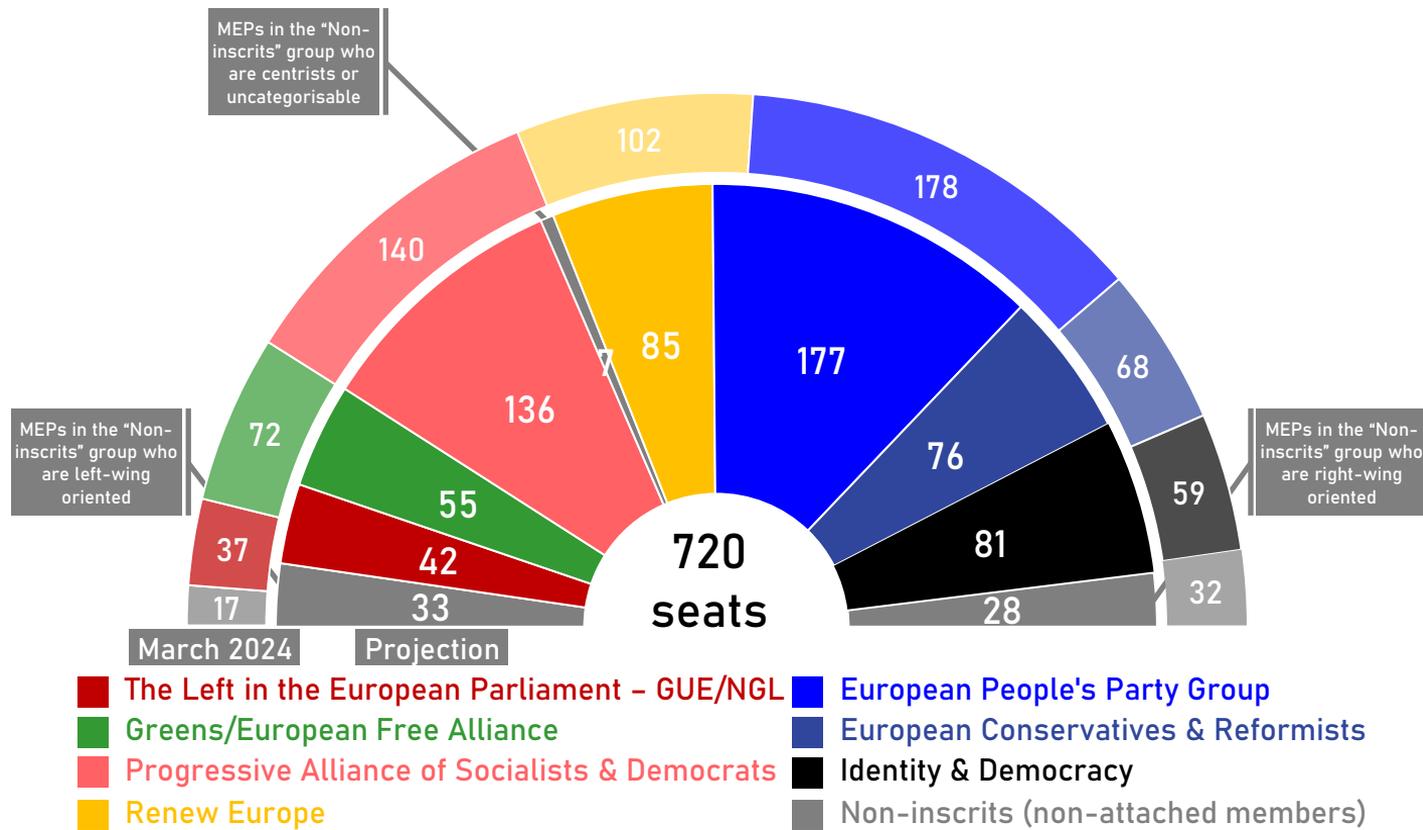
This coalition would have 233 seats out of 720, which represents a minority (32.4% of the seats).

While European institutions do not operate according to the majoritarian logic usual in parliamentary democracies, it is nonetheless interesting to see what types of alliances between groups in the European Parliament could have a majority.

Our projection shows that only coalitions including the EPP, S&D, and Renew groups would have a majority of seats. Right-wing coalitions (EPP, ID, ECR), Euro-critic coalitions (ID, ECR, NI, The Left) or even left-wing coalitions (S&D, Greens/EFA, The Left) would not be enough to pass bills.

In any case, the EPP and Renew groups will be decisive in shaping majorities in the next Parliament.

# THE PROJECTION INCLUDING A LEFT / RIGHT CLASSIFICATION OF THE PARTIES IN THE NON-INSCRITS GROUP



Beyond the margins of error associated with election polls and the fact that this projection was made 3 months before the election, many uncertainties remain.

One of the main ones concerns the 68 MEPs in the Non-Inscrits group, who could tip the balance in many close votes. They are ideologically balanced: 33 are members of left-wing parties, 28 of right-wing parties, and 7 are either centrist or from non-classifiable parties. If we add the right-leaning Non-Inscrits to the members of the EPP, ECR and ID groups, we get a very narrow majority: 362 MEP's out of 720. However, we can also see that the ideological distinction between members of the Non-Inscrits group makes the progression of the right less significant, as incumbent non-attached MEPs currently lean clearly to the right.

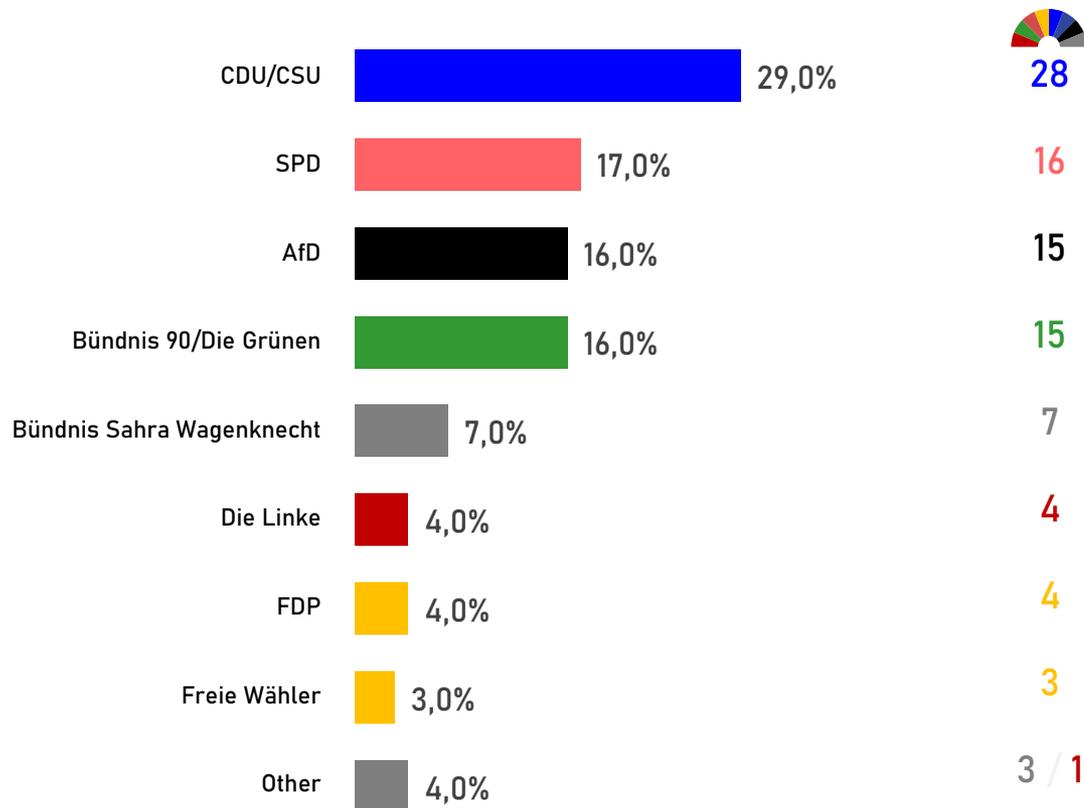
# The projected composition of the next European Parliament



# VOTING INTENTIONS AND SEAT PROJECTIONS - GERMANY

Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

96 seats

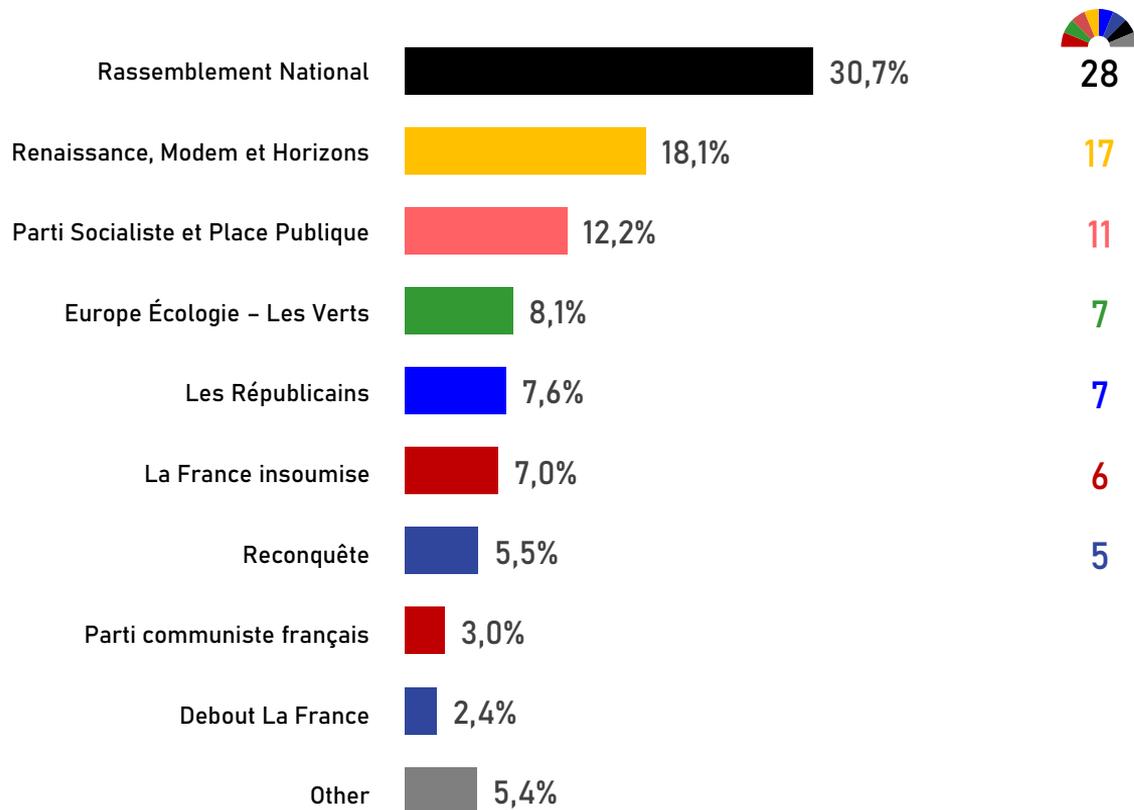


# VOTING INTENTIONS AND SEAT PROJECTIONS - FRANCE



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

81 seats

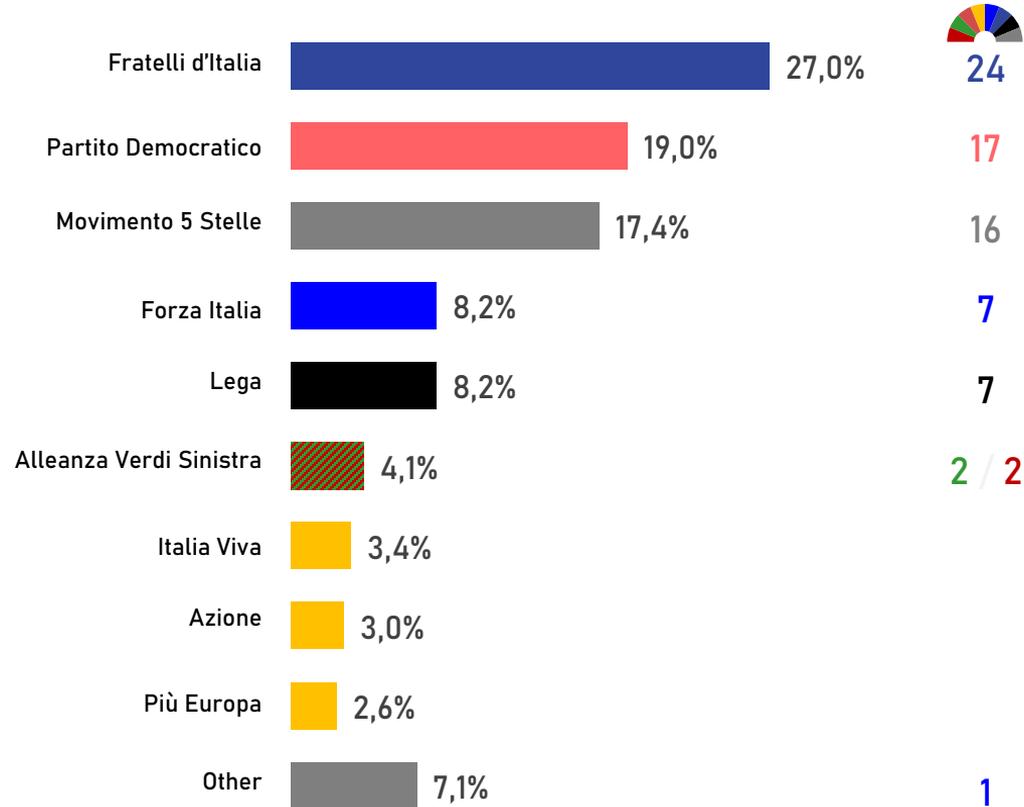




# VOTING INTENTIONS AND SEAT PROJECTIONS - ITALY

Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

76 seats

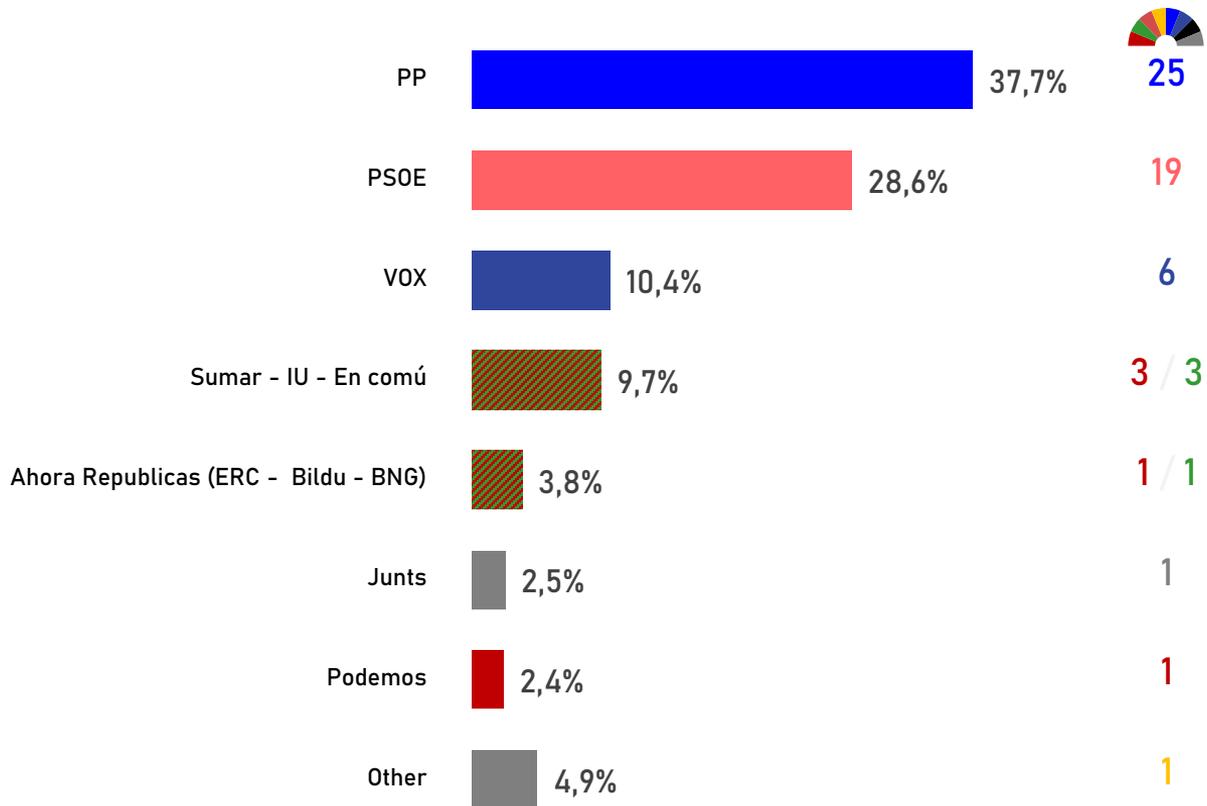




# VOTING INTENTIONS AND SEAT PROJECTIONS - SPAIN

Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

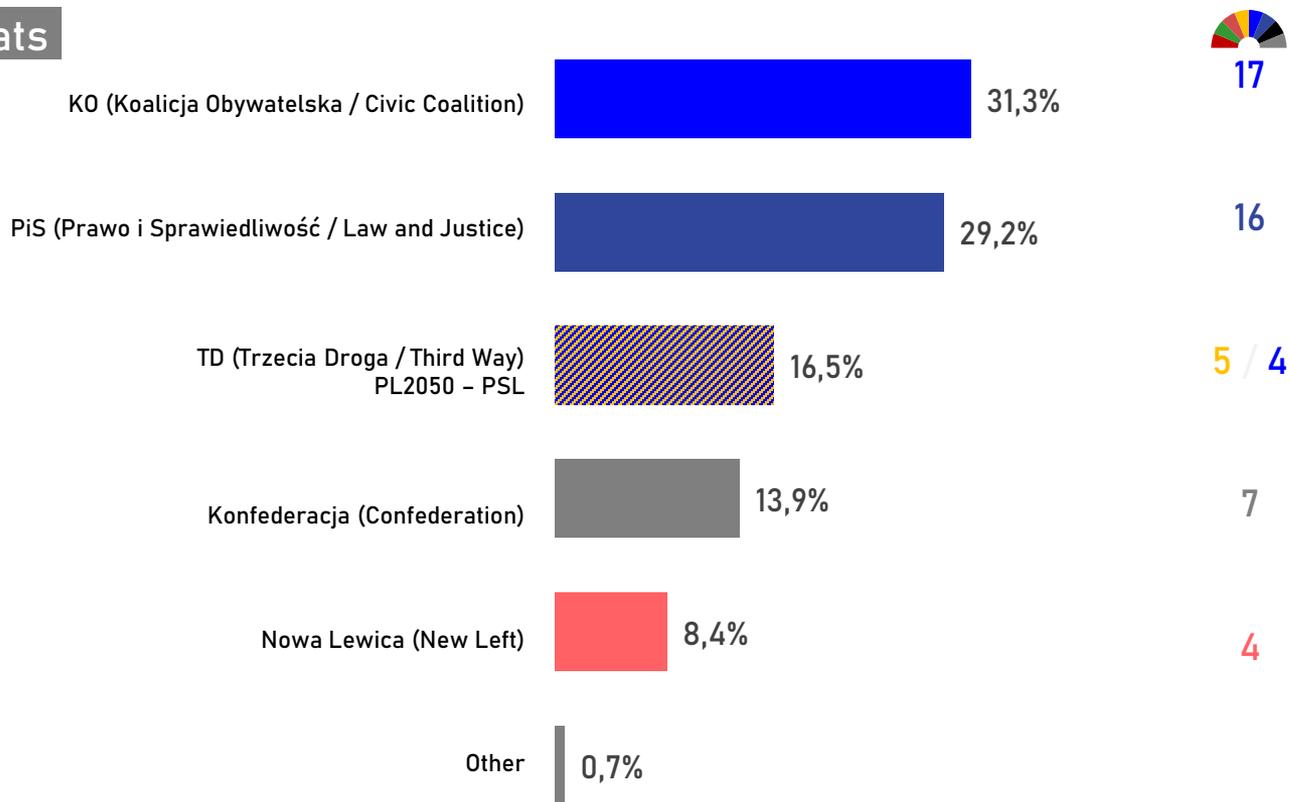
61 seats



# VOTING INTENTIONS AND SEAT PROJECTIONS - POLAND

Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

53 seats

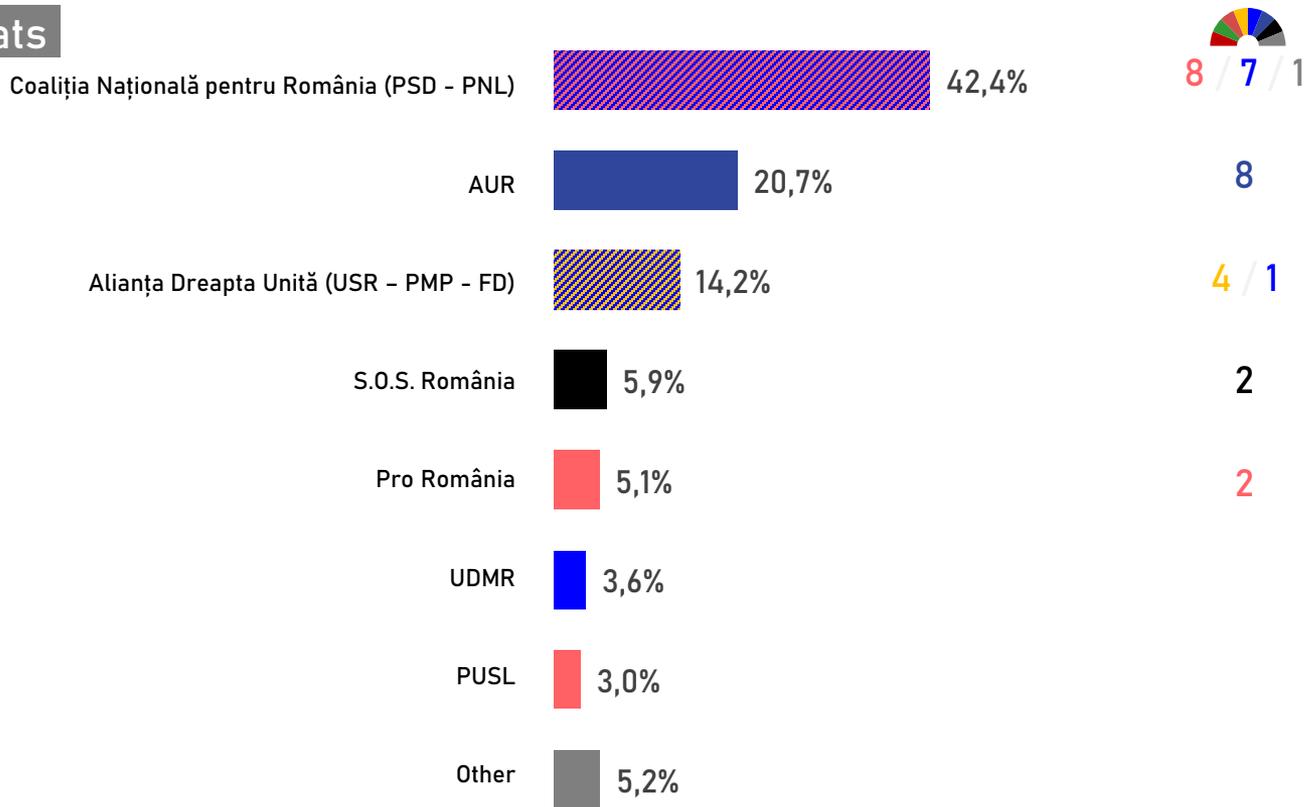


# VOTING INTENTIONS AND SEAT PROJECTIONS - ROMANIA



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

33 seats

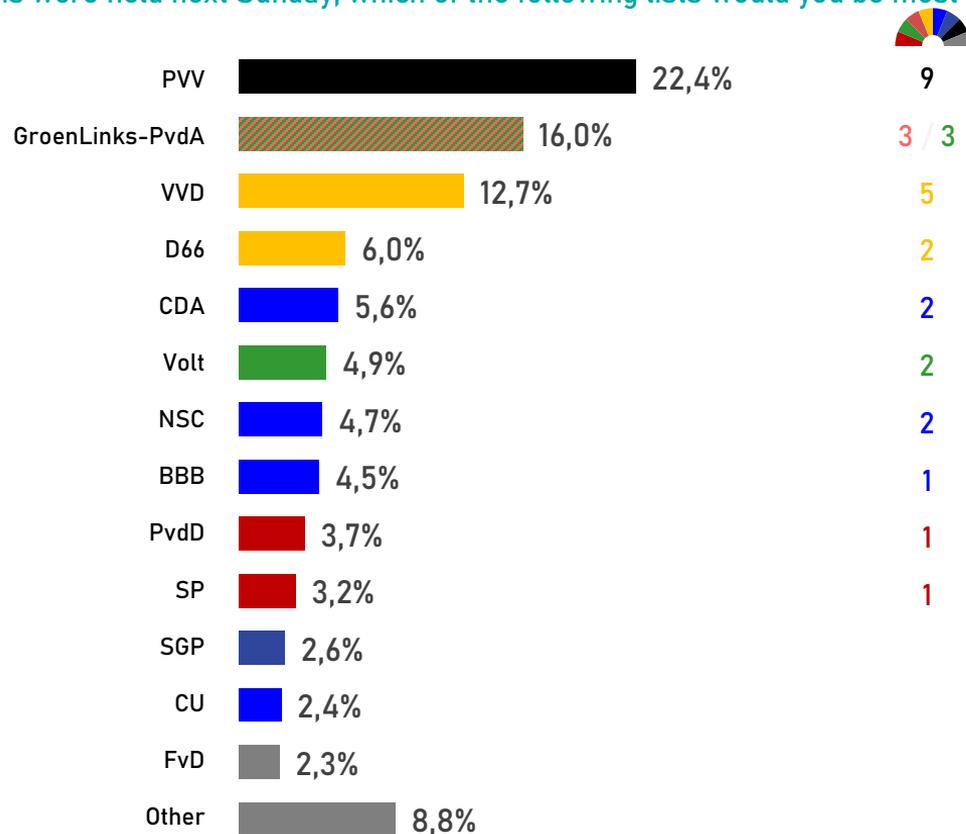


# VOTING INTENTIONS AND SEAT PROJECTIONS - NETHERLANDS



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

31 seats



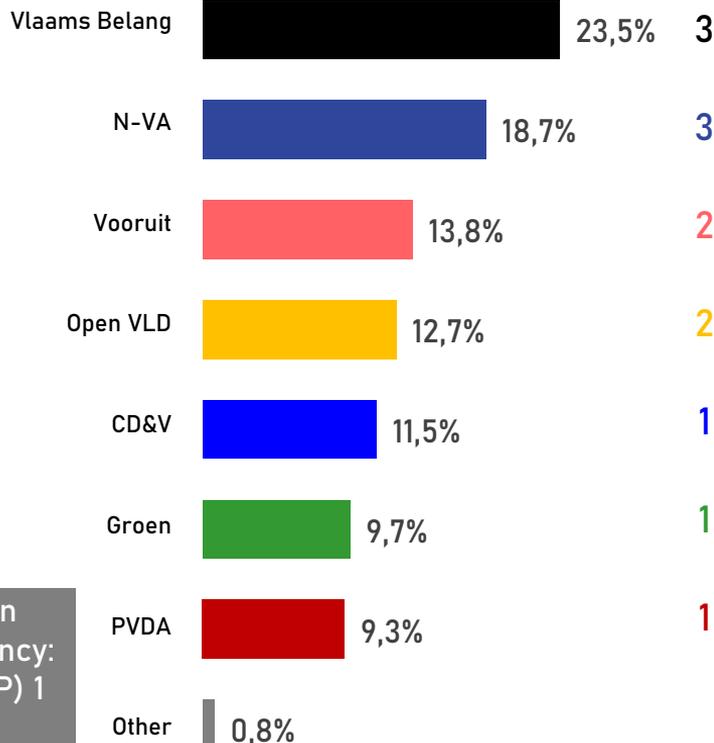
# VOTING INTENTIONS AND SEAT PROJECTIONS - BELGIUM



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

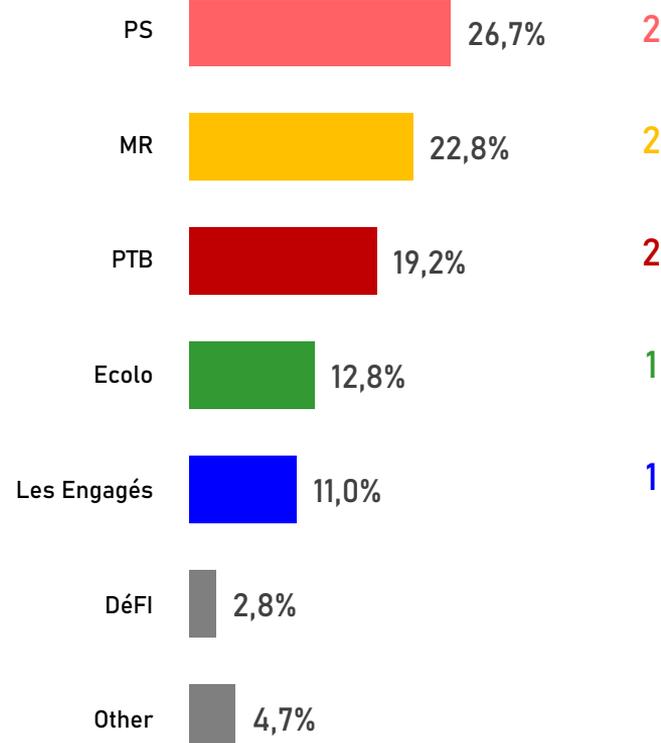
22 seats

Dutch



German constituency:  
CSP (EPP) 1 seat

French

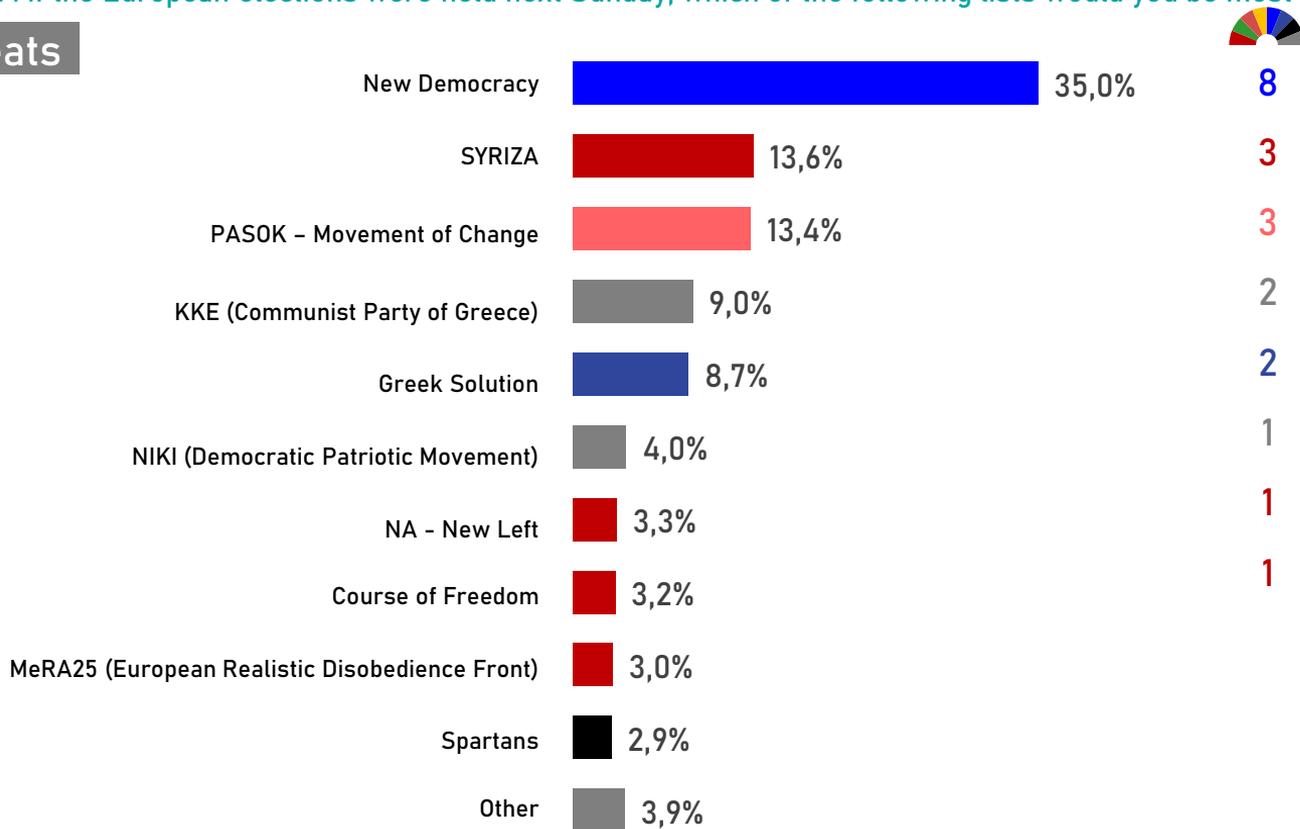


# VOTING INTENTIONS AND SEAT PROJECTIONS - GREECE



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

21 seats

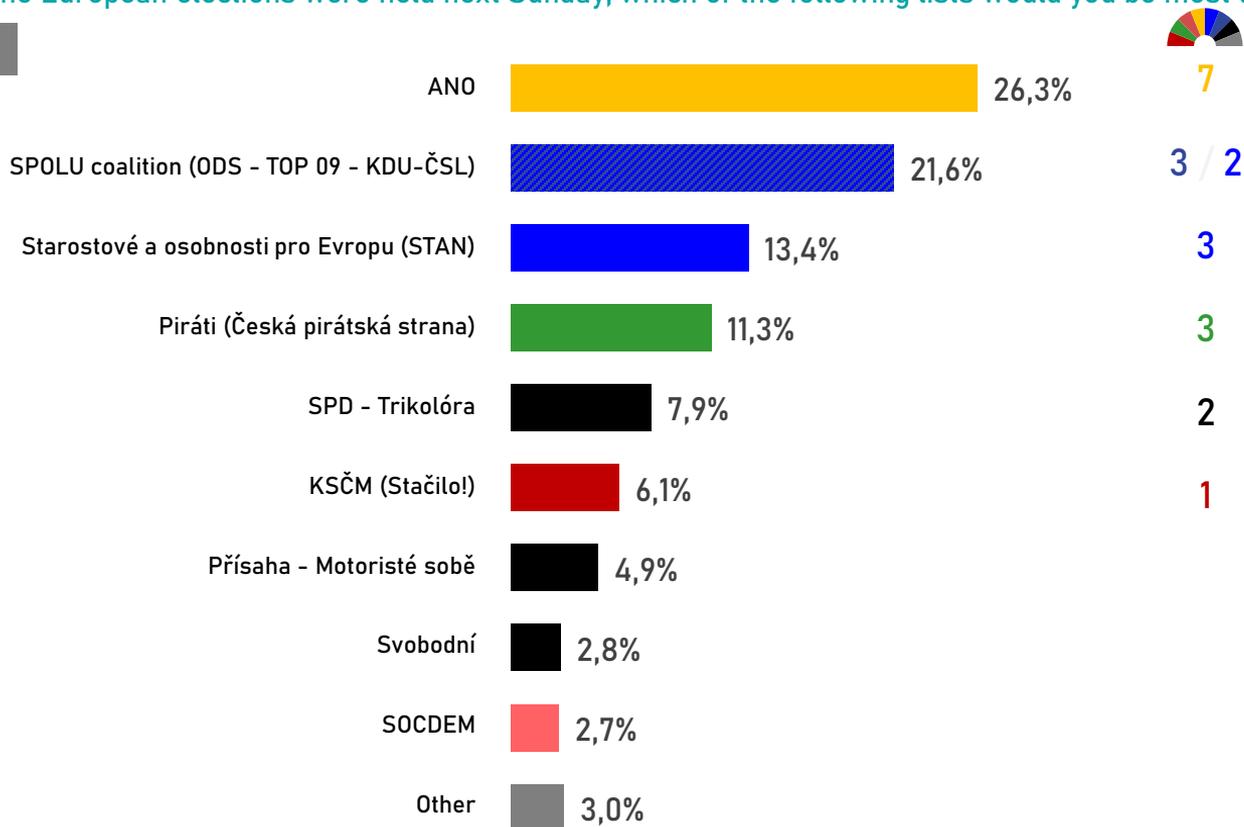


# VOTING INTENTIONS AND SEAT PROJECTIONS – CZECH REPUBLIC



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

21 seats

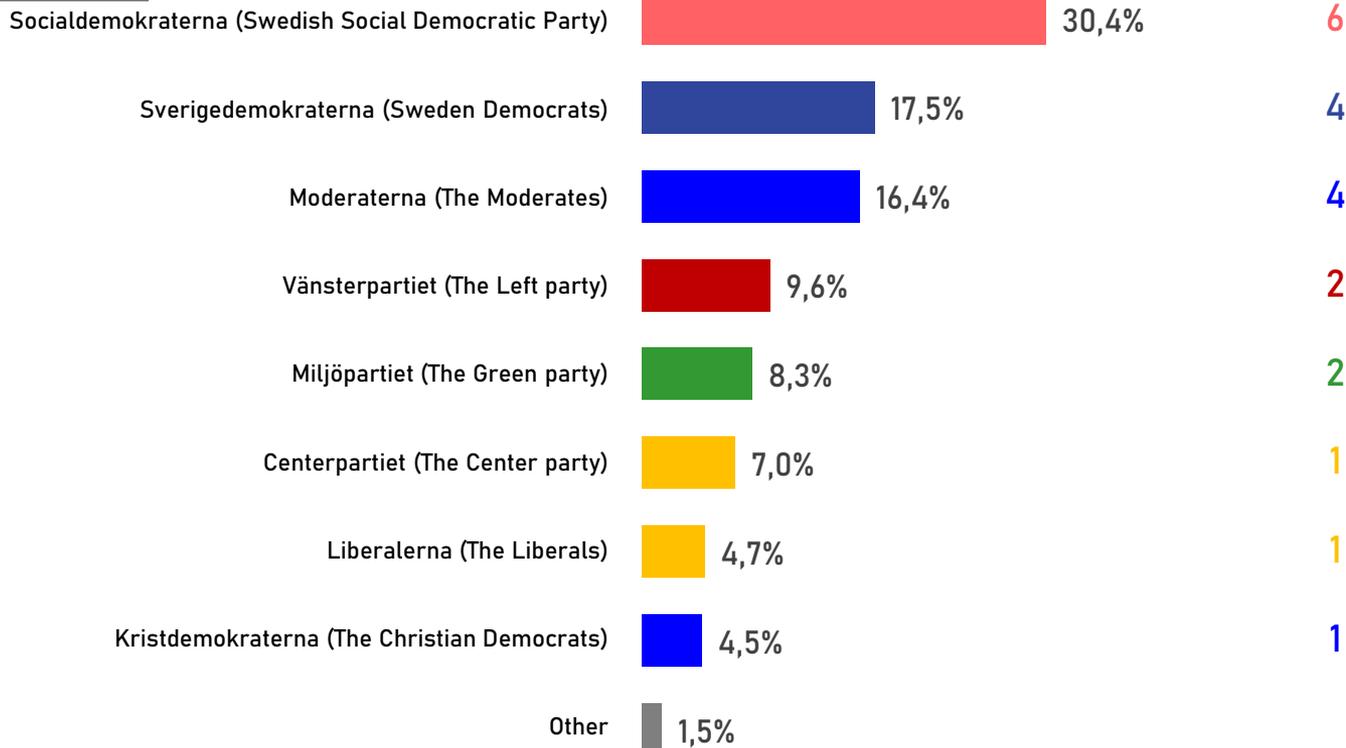


# VOTING INTENTIONS AND SEAT PROJECTIONS – SWEDEN



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

21 seats

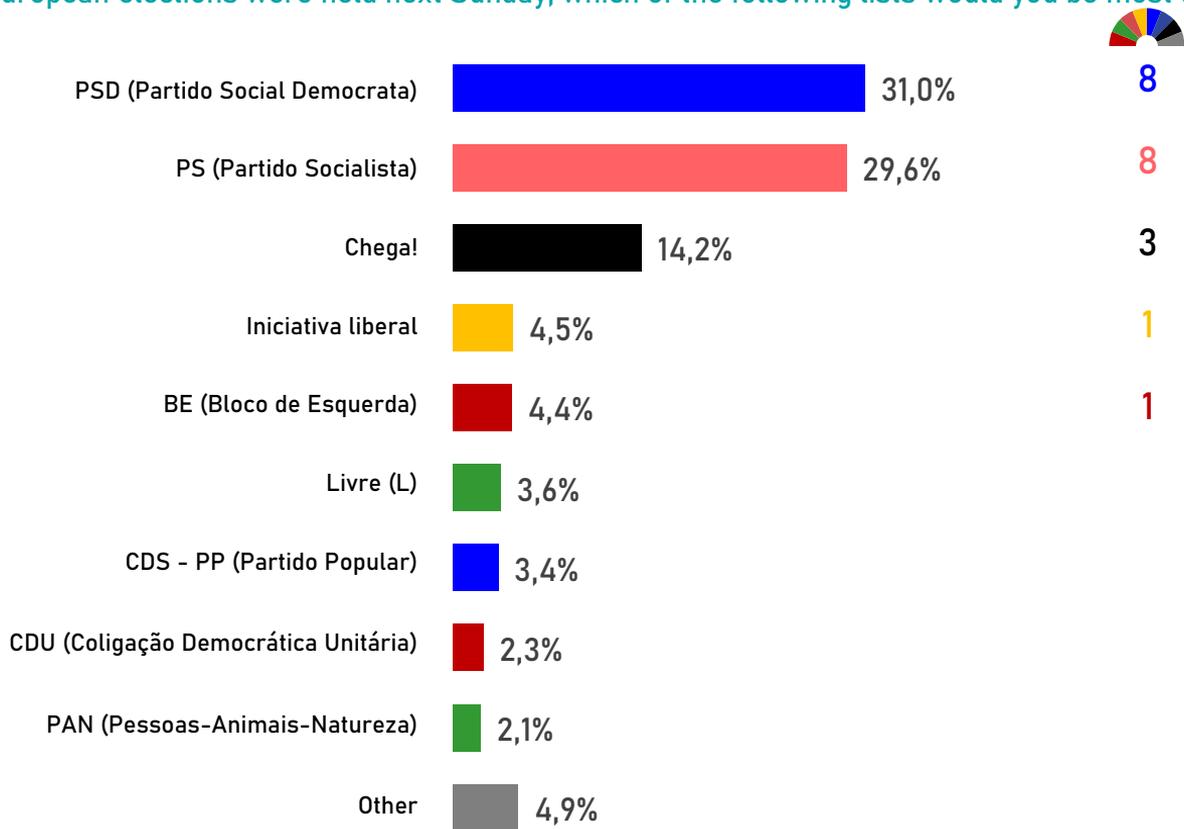


# VOTING INTENTIONS AND SEAT PROJECTIONS – PORTUGAL



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

21 seats

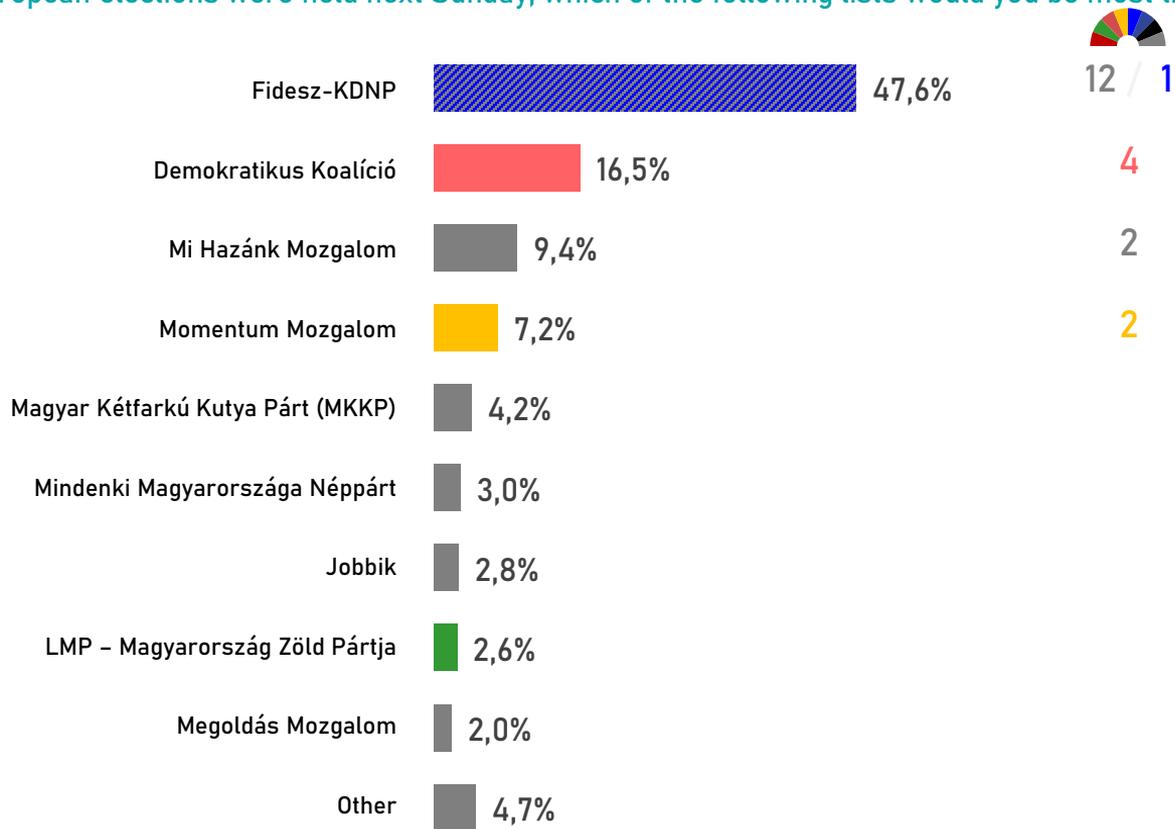


# VOTING INTENTIONS AND SEAT PROJECTIONS – HUNGARY



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

21 seats

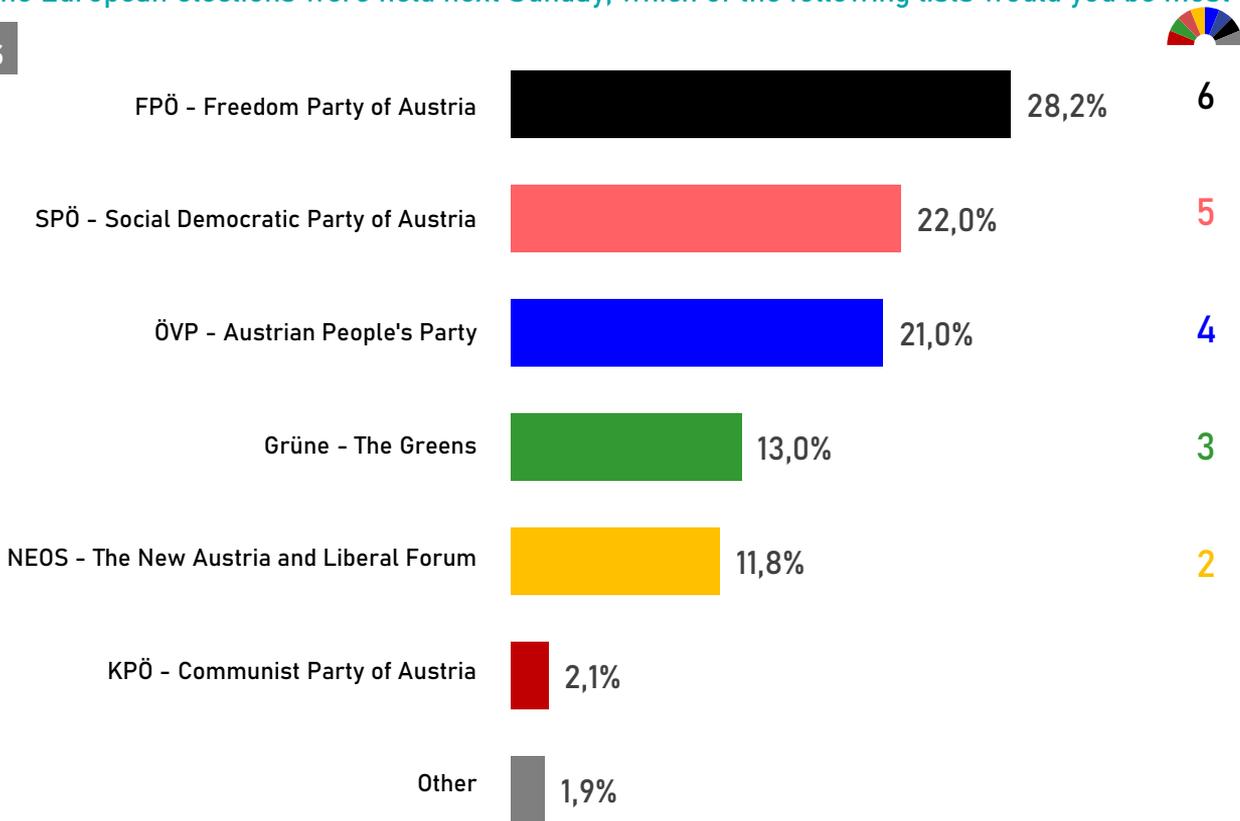


# VOTING INTENTIONS AND SEAT PROJECTIONS – AUSTRIA



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

20 seats

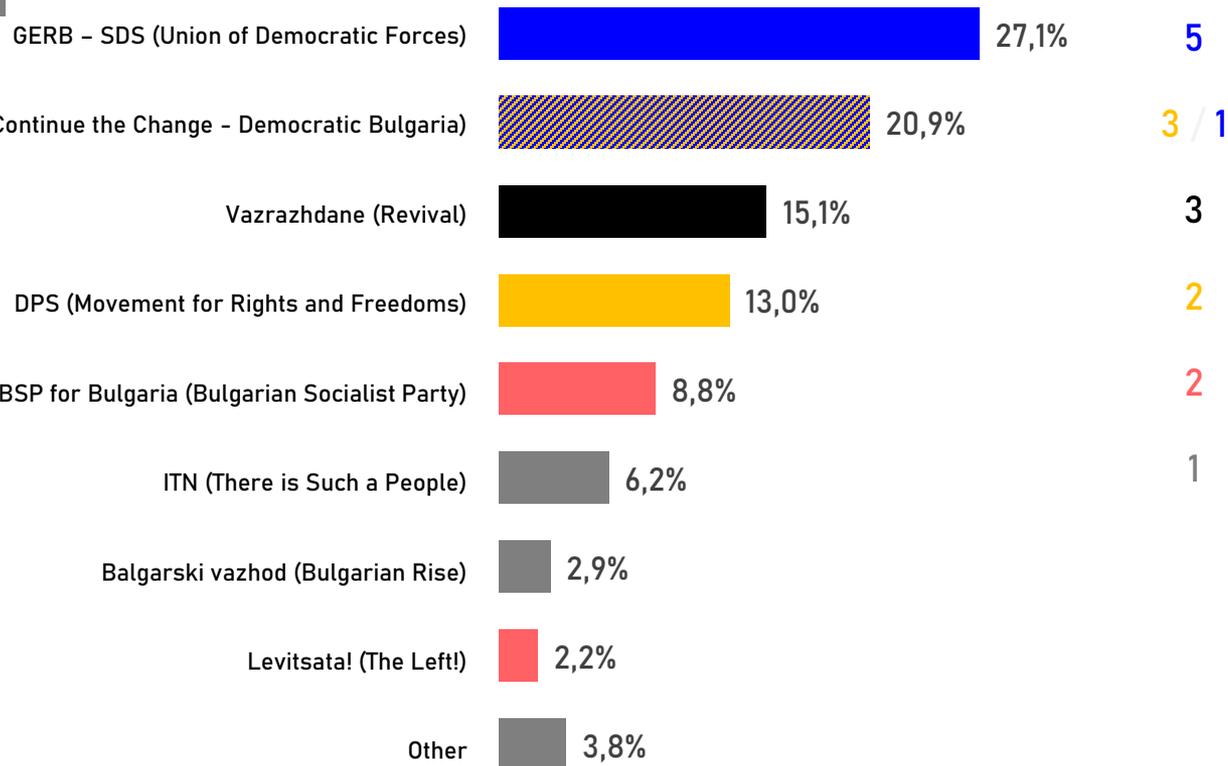


# VOTING INTENTIONS AND SEAT PROJECTIONS – BULGARIA



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

17 seats

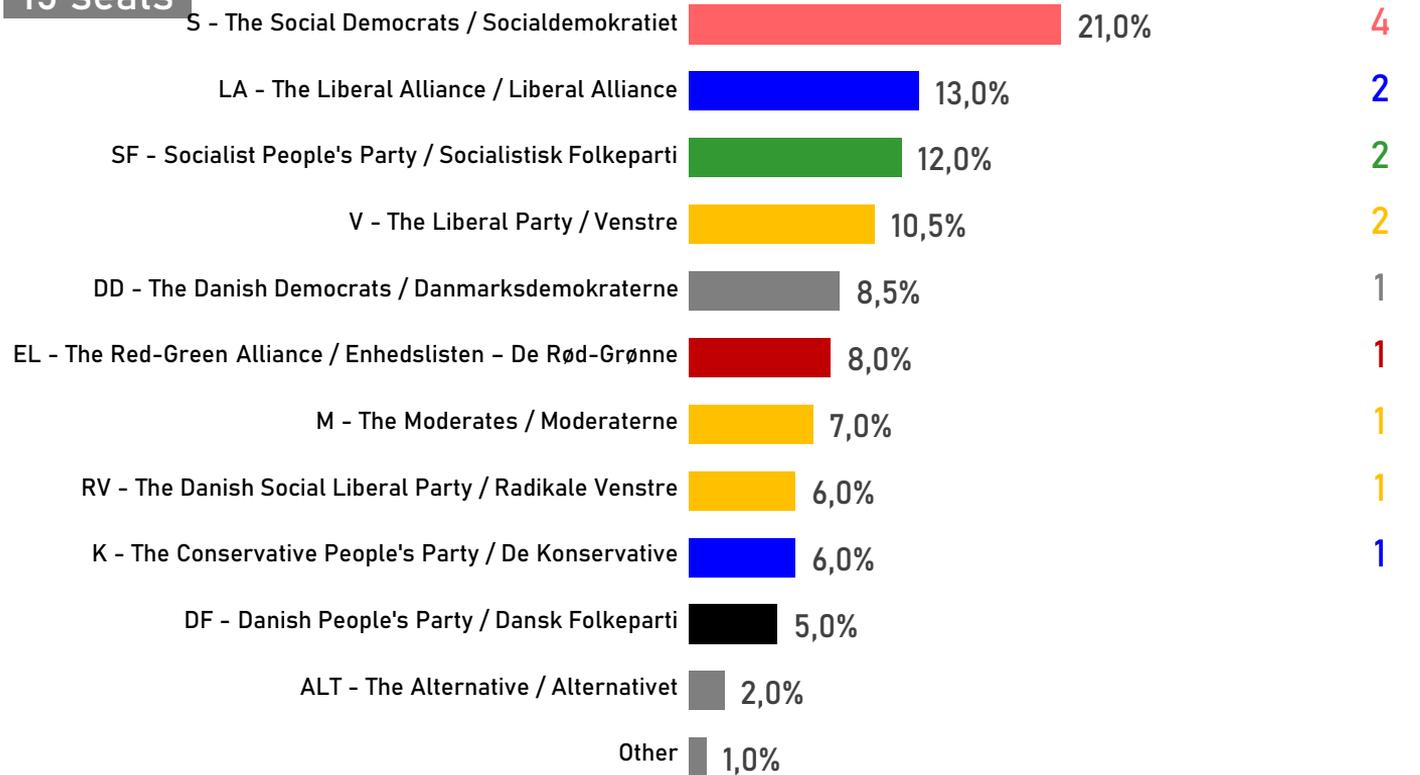


# VOTING INTENTIONS AND SEAT PROJECTIONS – DENMARK



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

15 seats

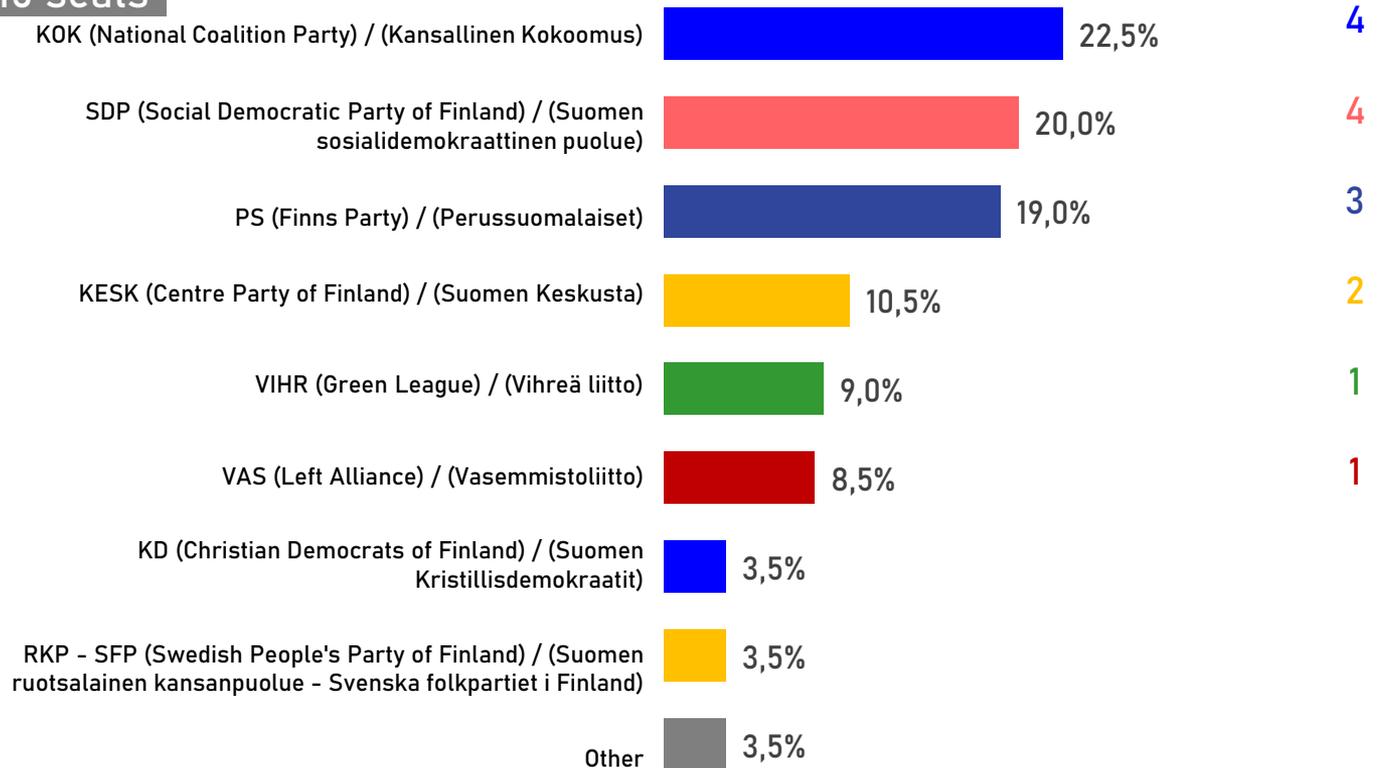


# VOTING INTENTIONS AND SEAT PROJECTIONS – FINLAND



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

15 seats

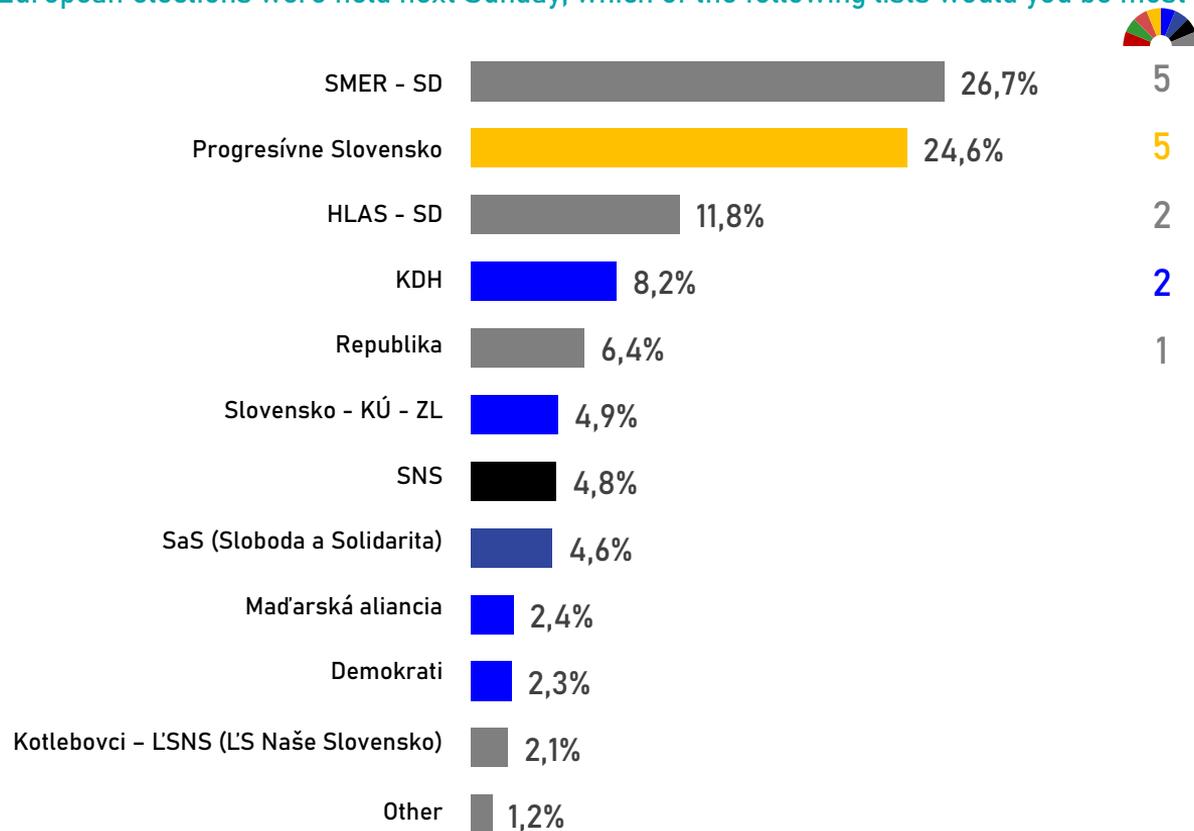


# VOTING INTENTIONS AND SEAT PROJECTIONS – SLOVAKIA



Question : If the European elections were held next Sunday, which of the following lists would you be most likely to vote for?

15 seats



# Appendix

# METHODOLOGY

This survey was conducted in 18 countries among representative samples of the population of voting age in each country. It was completed with documentary research for the remaining 9 countries of the European Union in order to represent the seats projection.

The countries surveyed represent 96% of the population of the European Union and 89% of the seats in the European Parliament (640 over 720). A total of 25 916 individuals were interviewed between February 23th and March 5th online and by telephone. Representativeness of the samples was ensured by the quota method.

In this instance, with regard to this study, with a confidence interval at 95%, The margins of error vary as follows :



## OVERALL SAMPLE (25 916 interviews)

Upper Limit	Actual Figure		Lower limit						
	1%	5%	10%	20%	50%	70%	90%	95%	99%
Upper Limit	1,1%	5,3%	10,4%	20,5%	50,6%	70,6%	90,4%	95,3%	99,1%
Actual Figure	1%	5%	10%	20%	50%	70%	90%	95%	99%
Lower limit	0,9%	4,7%	9,6%	19,5%	49,4%	69,4%	89,6%	94,7%	98,9%

## NATIONAL SAMPLES (970 interviews minimum)

Upper Limit	Actual Figure		Lower limit						
	1%	5%	10%	20%	50%	70%	90%	95%	99%
Upper Limit	1,6%	6,4%	11,9%	22,5%	53,1%	72,9%	91,9%	96,4%	99,6%
Actual Figure	1%	5%	10%	20%	50%	70%	90%	95%	99%
Lower limit	0,4%	3,6%	8,1%	17,5%	46,9%	67,1%	88,1%	93,6%	98,4%



	SEATS IN EUROPEAN PARLIAMENT	%	NUMBER OF INTERVIEWS	METHODOLOGY	
Germany		96	13%	3000	Online + telephone
France		81	11%	2000	Online
Italy		76	11%	1503	Online + telephone
Spain		61	8%	2000	Online + telephone
Poland		53	7%	1000	Telephone
Romania		33	5%	970	Telephone
Netherlands		31	4%	1896	Online
Belgium		22	3%	1500	Online
Czech Republic		21	3%	1517	Online
Greece		21	3%	1000	Online
Hungary		21	3%	1025	Online
Portugal		21	3%	2000	Online
Sweden		21	3%	1003	Online
Austria		20	3%	1000	Online
Bulgaria		17	2%	1000	Online
Denmark		15	2%	1000	Online
Finland		15	2%	1000	Online
Slovakia		15	2%	1502	Online

The weight of each country was then re-weighted in the overall results to reflect the demographic weight of the voting age population in each country. The overall results are therefore well representative of the EU population in these 18 countries.

# OUR COMMITMENT

## Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- SYNTEC ([www.syntec-etudes.com](http://www.syntec-etudes.com)), French Union of Market Research companies
- ESOMAR ([www.esomar.org](http://www.esomar.org)) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying the ICC/ESOMAR code for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : <https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client

:



- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.

Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION



- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards

# FOR MORE INFORMATION



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