

The KREAB logo is a white, bold, sans-serif font set against a dark red rectangular background.

KREAB

WORLDWIDE

The background of the entire page is a photograph of the European Parliament building in Brussels. The building's iconic semi-circular glass facade and a prominent spiral staircase are visible. In the foreground, several flagpoles hold the European Union flag and the national flags of various member states, including Ireland, Hungary, and Romania, which are waving in the breeze.

2024 EU ELECTIONS

Preliminary Assessment

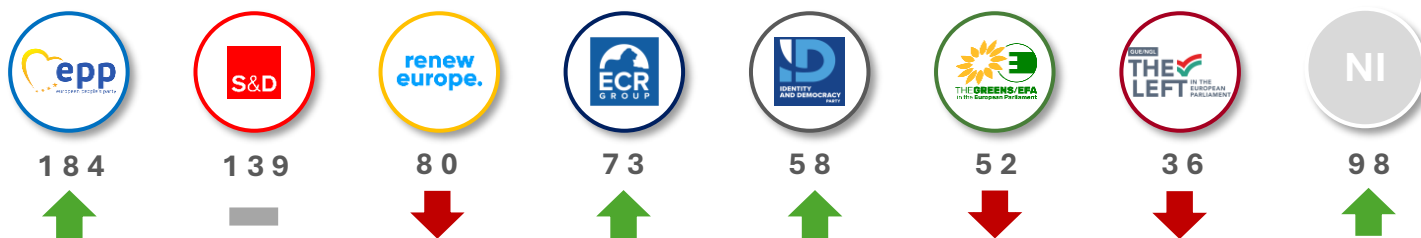
10 June 2024

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EXECUTIVE SUMMARY

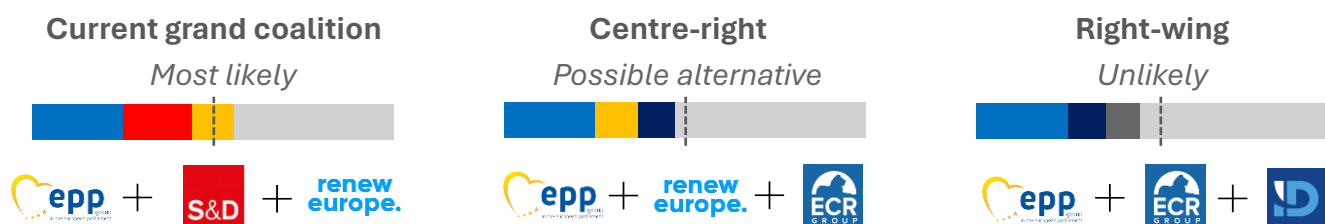
RESULTS



10 TAKEAWAYS

1. Elections' first consequences are national as **Macron calls for snap parliamentary election** in France later this month.
2. **EPP emerges as biggest winner** with extended lead over S&D and becomes unavoidable for coalitions.
3. **Shift to the right is confirmed but less strong** than expected.
4. **Grand coalition retains majority** (403 seats), paving way for top jobs and next policy agenda negotiations.
5. **2019 winners** (e.g. Macron, German Greens, Spanish liberals) **become 2024 biggest losers.**
6. **Non-attached is the 'group' that grows the most**, with almost 100 MEPs. Upcoming group membership talks will be crucial.
7. **Von der Leyen more likely to remain as Commission President** as weakened Macron may no longer try to challenge her.
8. **Germany's EPP delegation (CDU/CSU) remains EP's largest** with 30 seats, tied with Marine Le Pen's Rassemblement National.
9. **Next EP expected to prioritise growth agenda**, competitiveness and defence.
10. **Turnout of 51%** shows citizen mobilisation continues to be an issue.

COALITIONS



NEXT STEPS

Political groups meetings

10 June – Mid July: Political groups will meet internally to discuss potential membership changes, internal arrangements and policy priorities.

EU leaders enter scene

17 & 27-28 June: Informal discussion of top jobs begin, followed by the nomination of Commission President and adoption of the Strategic Agenda.

Constitution of new EP

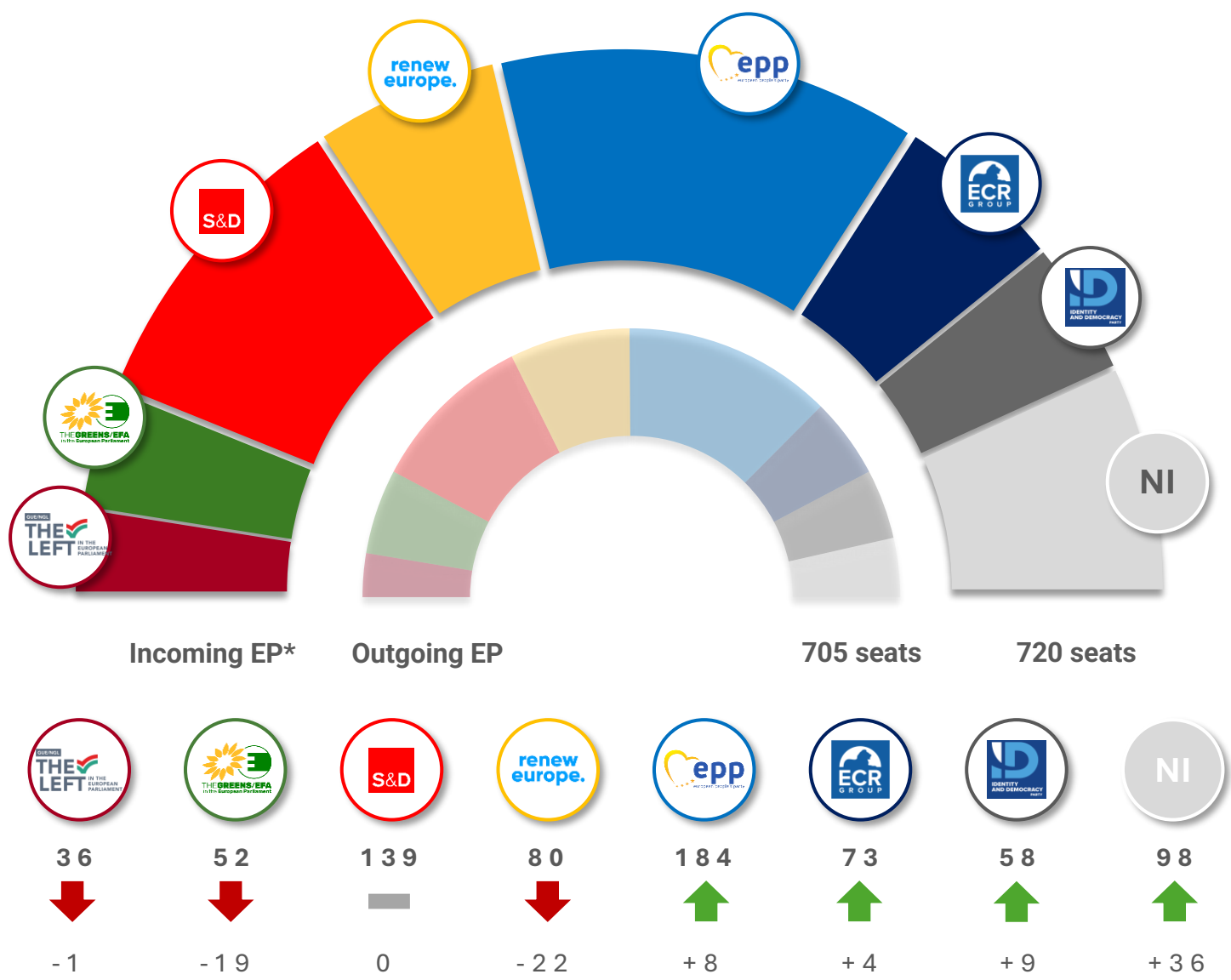
16-25 July: Start of the new legislative term with the first plenary session, with election of EP President and make-up of committees.

OVERVIEW OF RESULTS*

The centre-right European People’s Party (EPP) has emerged as this election’s biggest winner, with 184 seats. However, other political groups will hold three quarters of the total of 720 seats in the next European Parliament (EP), which will no doubt be one of the most fragmented to date.

While it remains too soon to fully examine the election’s implications (particularly from a policy perspective), this report presents a preliminary assessment of the results for each of the current seven political groups and each of the 27 Member States, including identifying some of the most prominent MEPs that will be staying in the EP.

We also discuss some of the potential consequences for coalitions and top jobs. We conclude by outlining the key next steps following the election.

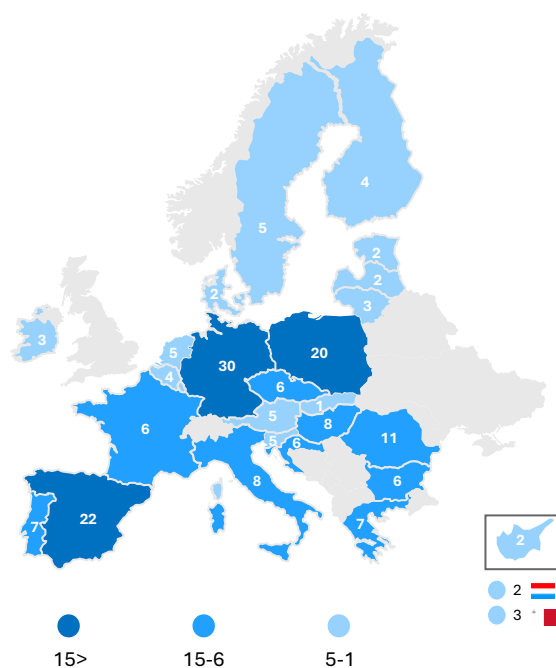


*Preliminary results, as of 08:00 CET, 10 June 2024

RESULTS BY GROUP

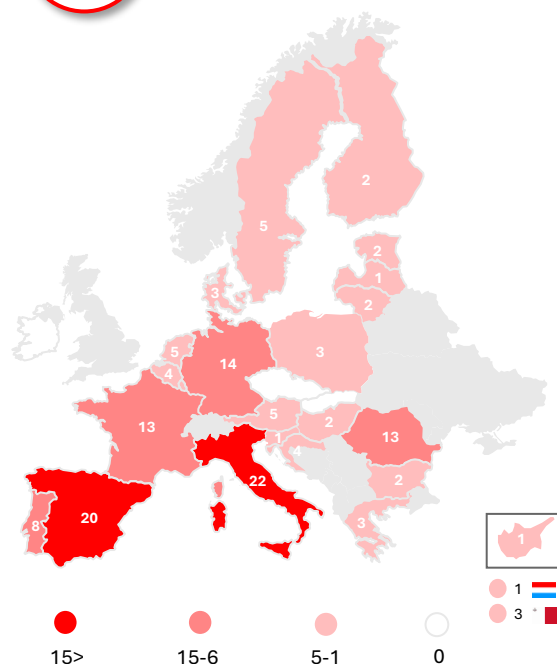
European People's Party (EPP)

- The centre-right group is the **elections' biggest winner** with 184 seats (up from 176). It remains the EP's largest group, by quite some margin (its seat advantage over the S&D grows from 37 to 45) and the **only group with seats in all Member States**.
- Germany remains the group's largest national delegation** (also in the EP as a whole) with 30 seats (up from 29). Other sizeable delegations include Spain (22) and Poland (20).
- Potential newcomers include Nieuw Sociaal Contract and BoerBurgerBeweging (both from the Netherlands).
- The EPP is **likely to become even more influential** than it already was in the previous term and will be able to **choose between two coalitions**: the grand coalition with S&D and Renew, or a centre-right grouping with Renew and ECR.
- The group is expected to **secure some top jobs, including the Commission President and EP President** (for the first 2.5 years). It will likely have 12-13 Commissioners.
- The EPP's top policy priorities include **strengthening security and defence, as well as boosting economic growth** and competitiveness through a "Made in Europe 2030" plan.



Socialists and Democrats (S&D)

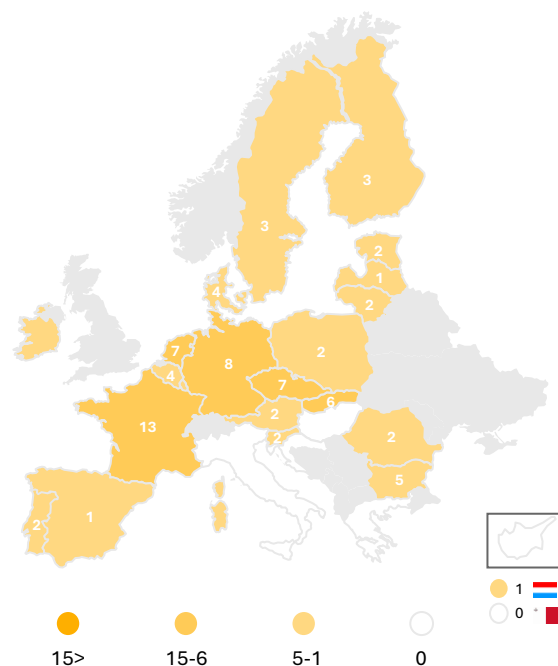
- The centre-left group will **retain its position as the second largest**, maintaining the same number of seats (139).
- The Member States with a **strongest presence in the group** are **Italy (22), Spain (20), Germany (14) and France (13)**.
- Potential newcomer parties could include Lietuvos regionų partija (Lithuania) and Sociálna demokracia (Slovakia).
- The S&D **will likely see its influence slightly decline**. While the grand coalition with the EPP and Renew seems like a clear path for top jobs and beyond, the **S&D could be sidelined on some policy issues where there is a right-wing majority**.
- The group could get the **Presidency of the European Council** and could **potentially share with the EPP the Presidency of the EP** (from H2 2027). The group will likely have 3 Commissioners (6 less than in the outgoing College).
- The S&D's top policy priorities include **guaranteeing workers' rights, implementing a new Green and Social Deal** for a just transition and putting in place a "Made in Europe" Strategy.



RESULTS BY GROUP

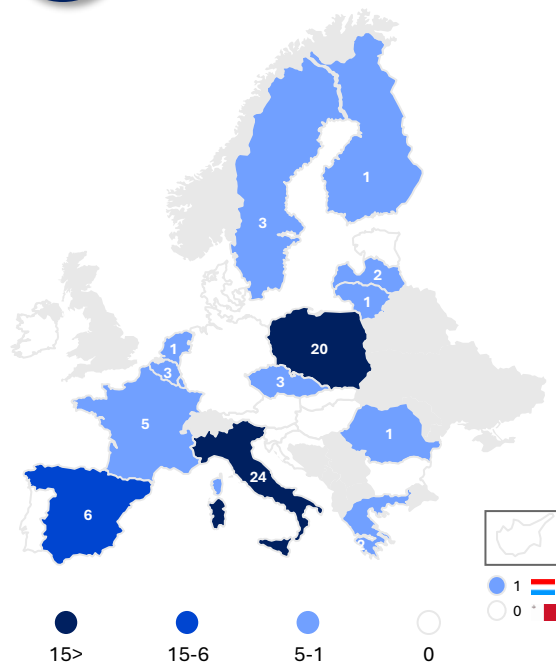
Renew Europe (RE)

- The liberal group is **one of the elections' biggest losers, dropping 22 seats** (from 102 to 80). Despite this setback, Renew could remain the third largest group in the Parliament.
- The **loss of votes mostly comes from Spain** (from 9 seats to 1) **and France**, where Macron's list suffered a major defeat by losing 8 seats too. Nonetheless, the group will continue to be dominated by France (13), the Czech Republic and the Netherlands (7 each).
- It remains to be seen if the Dutch party Volkspartij voor Vrijheid en Democratie (VVD) will remain within the group given its recent coalition agreement with far-right parties. If VVD is expelled, the group could split in two.
- The group **will likely have 2 Commissioners** (3 less than in the outgoing College). **Estonia's PM Kaja Kallas has positioned herself as one of the main contenders for the role of High Representative (HR/VP).**
- Some of Renew's top priorities include **enhancing the EU's defence capabilities and economic security, investing in digital and sustainable technologies and reducing dependencies.**



European Conservatives and Reformists (ECR)

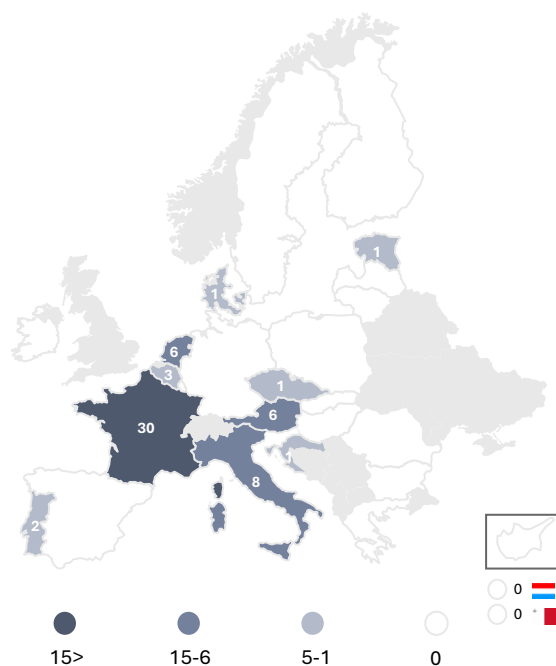
- The conservative (and often Eurosceptic) group takes **fourth place as it grows from 69 to 73 seats.**
- The **Italian delegation will lead the group with 24 seats, closely followed by Poland (20, down from 26).** In Spain the group doubles its MEPs to reach 6 while in France Éric Zemmour's new party enters the EP with 5 seats.
- Potential newcomers could include Fidesz (Hungary) or even Rassemblement National (France), although this is unlikely.
- The ECR is set to **become more influential in the next term, particularly if other parties were to join it.** For now, **von der Leyen has clearly signalled she will be relying on its support** (provided she is nominated by the European Council).
- The group is expected to have 2-3 Commissioners in the next College.
- The ECR's priorities include **strengthening national sovereignty**, putting in place a 'comprehensive migration strategy' and **balancing climate objectives with the growth agenda and industrial policy.**



RESULTS BY GROUP

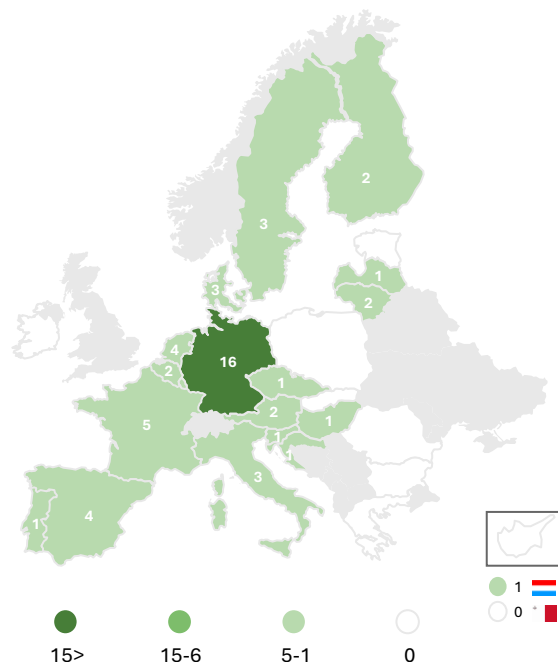
Identity & Democracy (ID)

- The far-right Eurosceptic group **grows less than expected** (from 49 seats to 58) **and takes fifth place overall**. Had Germany's Alternative für Deutschland (AfD) not been expelled, the group would have secured 74 seats.
- **More than half of the group's seats come from France** (30), while other sizeable include the Netherlands (from 0 to 6 seats) and Italy (from 21 to 8).
- Potential newcomers could include Se Acabó La Fiesta (Spain) or Fidesz (Hungary).
- **The future of the group could be at stake** if Marine Le Pen succeeds in creating an alliance with (part of) ECR. In any case, it **remains to be seen how coordinated and influential the group will be** and how involved its MEPs will become in legislation (so far it has been much more focused on trying to block legislation than on actively participating in negotiations).
- The group is **not expected to hold any top positions** given that pro-EU parties will likely maintain their existing 'cordon sanitaire'.
- The ID's **priorities include combatting illegal immigration, overthrowing the Green Deal and opposing EU integration**.



The Greens/EFA

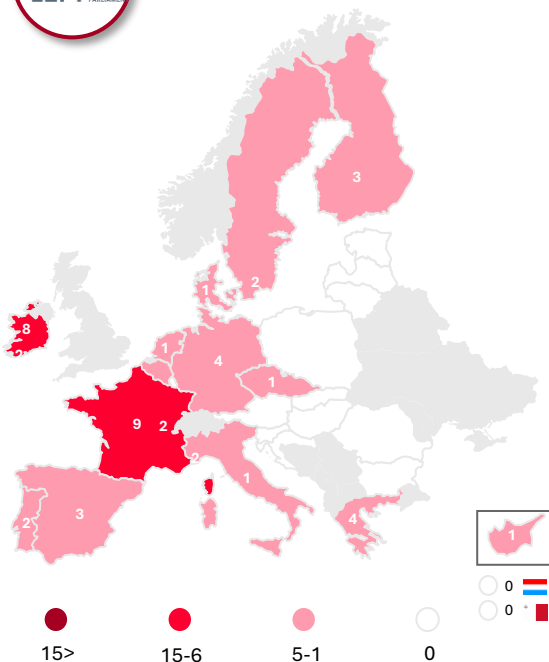
- One of the big losers, the **Greens are now the EP's sixth largest** (or second smallest) group with 52 seats (compared to their outgoing 72 seats).
- The Greens' **losses concentrate in France (-7) and Germany (-9)**. Nonetheless, Germany continues to dominate the group (16 seats), followed by France (5) and the Netherlands (4).
- The group's **influence will clearly be diminished**, meaning it will not lead nor have the power to block key policy proposals and initiatives.
- Potential newcomer parties could include Alleanza Verdi e Sinistra (Italy) and Magyar Kétfarkú Kutya Párt (Hungary), as well as Sumar (Spain).
- The group is **not expected to hold any top positions and is likely to lose its only Commissioner** (Lithuania). To note, if Ursula von der Leyen is not elected as Commission President, Germany is expected to put forward a Green Commissioner.
- The Green's top policy priorities undoubtedly include the **Green and Social Deal, clean energy by 2040 and the protection of fundamental rights**.



RESULTS BY GROUP

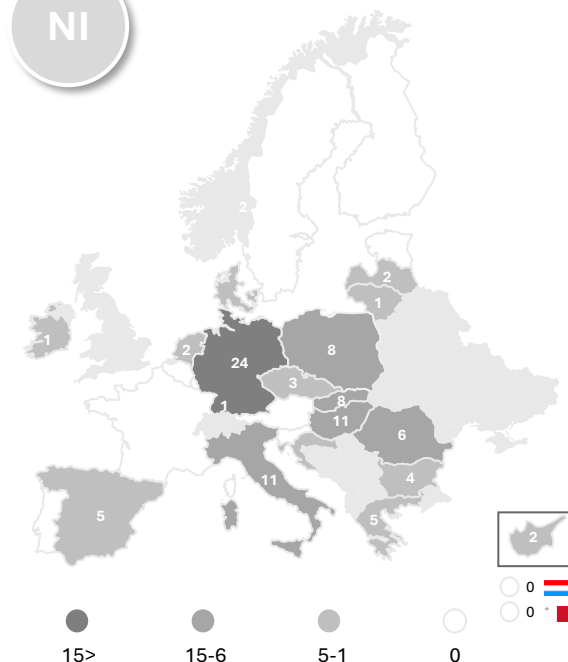
The Left

- The far-left group has **gathered a similar level of support** (from 37 to 36) and will **continue to hold the last place** in the EP.
- The **largest delegations are France (9), Ireland (7) and Germany (4)**. The group it is unlikely to play an important role in shaping policy priorities and outcomes in the next term.
- Potential newcomers could include Alleanza Verdi e Sinistra (Italy), Sumar (Spain) and Kommounistikó Kómma Elládas (Greece). A new German left-wing party called BSW and formed by former Die Linke co-chair Sahra Wagenknecht has raised in the last few weeks uncertainty around Die Linke's prospects as it could become the largest delegation. BSW has stressed it will seek to form a new group in the EP away from The Left.
- The group is **not expected to hold any top positions**.
- The Left's top policy priorities include **fighting neo-fascism and war, promoting social transformation** through a just green transition, **fighting poverty** and mobilising financial resources for the creation of green jobs.



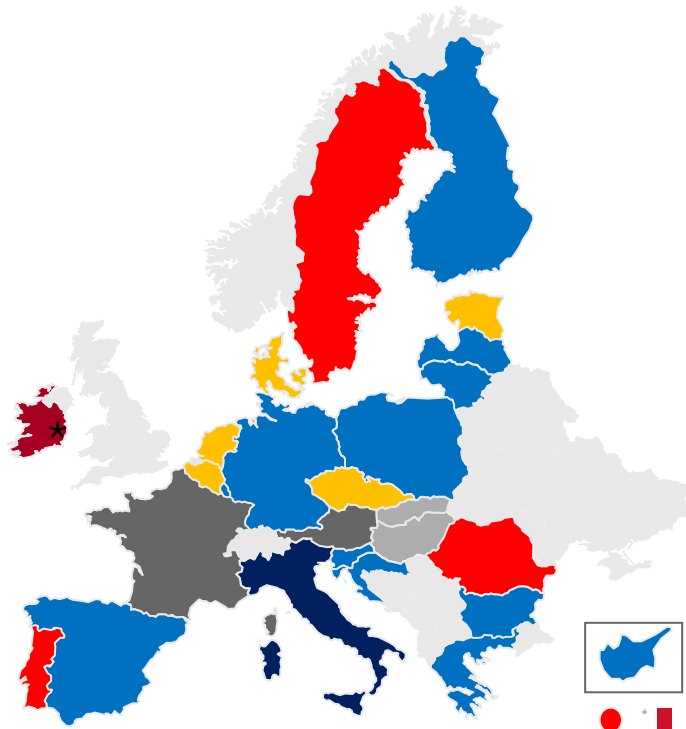
Non-attached (NI) & New

- National parties that were not part of any political group in the outgoing Parliament win a total of **45 seats** (down from 61). This includes Germany's **Alternative für Deutschland** (17 seats, up from 8), Hungary's **Fidesz** (10 seats, down from 12) and Italy's **Movimento Cinque Stelle** (8 seats, up from 5).
- Meanwhile, **new national parties that have not yet joined a political group get 50 seats**. This includes Poland's **Konfederacja Wolność i Niepodległość** (6), Germany's **Bündnis Sahra Wagenknecht** (5), **Spain's Se Acabó la Fiesta** (3) and **Bulgaria's Vazrazhdane** (3).
- In the coming weeks, **many of these parties will try to join existing political groups (or form a new one)** as remaining non-attached would significantly reduce their influence in the next term. To note, **most of these parties are right-wing or far-right**, meaning they are most likely to join ECR or ID.



MEMBER STATES

- As expected, national political dynamics dominate the election. Overall, citizens seem to have **rewarded right-leaning national governments, while generally punishing centre and left-leaning governments**, which explains the broad victory of the right.
- Conversely, the **election results have already influenced domestic politics** prompting the dissolution of the French parliament.
- The **poor showing of Germany's centre-left coalition and France's liberals** coinciding with big wins for the far-right can be seen as a **microcosm of the broader election results** across the continent.
- The elections have also seen a **large disparity in voter turnout** between Member States (e.g. 65% in Germany while only reaching 49% in Spain).



* Preliminary result (28% of votes counted) for Ireland



Germany (96)



- EPP with lead candidate Ursula von der Leyen **wins most seats in Germany** in a clear defeat of the government coalition of S&D, Greens and Renew.
- **Far-right AfD (sitting as NI)** records historic result after its expulsion from ID gaining 4 seats despite allegations over foreign interference.
- The government will most likely support Ursula von der Leyen as Commission President.



France (81)



- ID obtains 30 seats (gaining 8) in a **landslide victory** over President Macron's Renew prompting him to **call snap parliamentary elections**.
- The French S&D delegation almost doubles its seats in the new Parliament, whereas the Greens lose more than half of theirs.
- Thierry Breton could be nominated for another term for an economic/industrial policy portfolio.



Italy (76)



- ECR wins 19 additional seats solidifying PM Meloni's dominance over coalition partners in EPP and ID.
- In the opposition, **S&D achieves a strong result** being the second most voted group, increasing its seats from 15 to 22 and becoming the largest S&D delegation. The Greens retain their 3 seats from 2019.
- European Affairs Minister Raffaele Fitto seems a possible candidate for Italy's Commissioner post.



Spain (61)



- EPP surges (from 13 to 22 seats) but is **incapable of destabilising governing S&D** which only loses 1 seat.
- Spanish ECR improves its previous results, now adding 2 additional MEPs, while a new far-right party (under NI) irrupts into the EP with 3 seats.
- Renew is close to disappearing, losing 8 seats.
- Stable result for S&D certifies Energy Minister Teresa Ribera's (S&D) bid to become the next Commissioner for the Green Deal.



MEMBER STATES

Poland (53)



- Overall, EPP maintains 20 MEPs, the ECR loses 6 and the S&D and Renew both shrink.
- The EU elections corroborate the **consolidation of the governing EPP's coalition over the ECR** (following the 2023 national elections).
- The Polish left remains inconsequential while the **far-right (sitting as NI) surges** with an additional 5 seats.

Netherlands (31)



- Joint Green-S&D ballot wins in principle but splits into two groups in EP (6 and 5 MEPs respectively) **remaining weaker than the governing Renew, EPP and ID parties.**
- Renew and EPP maintain 7 seats. **Real big winner is ID**, building on general election success with 6 MEPs, while ECR loses 4 seats.

Greece (21)



- The governing EPP remains on top maintaining its 7 seats despite losing votes since the June 2023 national election.
- The Left replicates its 2019 results, while the S&D gains 2 seats.
- The ECR's 2 seats reflects increasing support for the far-right in Greece.

Sweden (21)



- EU elections contrast with the 2022 general elections, which saw the Swedish ECR entering the government as part of an EPP-ECR coalition. 2 years later, the party has fallen to 4th position in Sweden, although it retains its 3 MEPs.
- The rest of the parties replicate their results with the only shifts happening in the EPP (-1) and Left (+1).

Romania (33)



- EU elections deliver a **confidence vote in the governing grand coalition** composed of Romanian S&D and EPP, who ran on a joint ballot. The S&D is the clear winner gaining 4 MEPs while the EPP loses 2.
- The Romanian **far-right (sitting as NI) sees an important increase** from 1 to 5 seats, while Renew drops from 7 to 2 seats.

Belgium (22)



- Prime Minister de Croo announces his **resignation** after significant losses for the Flemish Liberals at European, federal and regional level.
- S&D wins 2 additional seats in Belgium tying the 4 seats of Renew and EPP.
- ID and ECR retain 3 seats in the EP after strong performances in Flanders, while the Greens lose 1 MEP.

Czechia (21)



- **Opposition Renew wins the elections in Czechia** with 2 additional seats.
- PM Fiala's Together Alliance falls just short of Renew with 6 seats that could be split between ECR and EPP. Their coalition partner will add 2 further seats for the EPP, resulting in a total 5 EPP and 3 ECR seats.

Portugal (21)



- Shortly after the 2024 national elections, the **opposition S&D secures a thin victory over the ruling EPP.**
- The S&D loses 1 seat, but still retains an edge over the EPP which maintains its 7 seats.
- The Portuguese ID enters the EP with 2 seats but falls short of its success the national election.
- Greens disappear while Renew wins 2 seats.



MEMBER STATES

Hungary (21)



- Péter Magyar's TISZA emerges as a challenger to PM Victor Orban winning over 30% of the vote leading to 7 additional seats for the EPP.
- Orban's Fidesz party (NI) remains strongest party but loses 2 seats.
- The S&D also loses 2 seats.

Bulgaria (17)



- EPP emerges as the strongest party in national and European elections, but the formation of a new government remains uncertain.
- Renew receives an 2 additional seats, whereas S&D loses 3 seats compared to 2019.
- MEP Eva Maydell (EPP) may be considered as a potential candidate for Commissioner.

Finland (15)



- The governing EPP emerges as the winner with 1 additional seat, while the junior coalition partner ECR loses 1 seat.
- S&D's delegation remains unchanged at 2 seats but is overtaken by the Left (+2) as second force.
- Renew replicates 2019 result.
- EPP lead candidate Henna Virkkunen likely to be considered for the Finnish Commissioner post.

Ireland (14*)



- Ireland adjourned the count to Monday morning.
- Latest polls predicted the EPP to win 5 seats, Renew 3 seats and the Left 4 seats.
- Renew member party Fianna Fáil will most likely nominate a candidate for the Commissioner post.

* Exit poll (Counting will resume early on the 10th)

Austria (20)



- Austrian far-right ID surges to top position, doubling its 2019 results (from 3 to 6).
- Outcome indicates discontent with governing coalition composed of the EPP and Greens, which respectively lose 2 and 1 seats.
- The S&D holds its numbers while Renew gains an additional MEP.

Denmark (15)



- The Greens win big in the popular vote overtaking the governing S&D although both parties obtain 3 seats.
- Renew stays largest force but loses 2 seats, while EPP gains an additional MEP.
- EVP Vestager is unlikely to be nominated for a third term as the post will likely go to a Social Democrat.

Slovakia (15)



- Renew wins with an additional 2 seats, PM Fico's party (sitting as NI) more than doubles its presence (2 to 5 seats), and far-right (sitting as NI) enters the EP with 2 seats.
- Big loser is the EPP who loses 3 MEPs.
- Although likely to lose his Green Deal portfolio, EVP Šefčovič may be returning as Commissioners for a new mandate.

Croatia (12)



- The EPP wins 2 additional seats confirming its victory in the April 2024 national election.
- The S&D obtained the second-largest number of votes retaining 4 seats.
- Commissioner Dubravka Šuica is considered as a likely candidate for a second term.



MEMBER STATES

 **Lithuania (11)**



- EU election results show **preamble** of what can be expected in **October 2024 general elections**.
- Lithuanian EPP, leading the coalition government, loses 2 seats, while Renew gains an additional seat and ECR enters the EP with 1 MEP.
- The Greens and S&D both replicate their 2019 results.

 **Latvia (9)**



- **Governing EPP** wins popular vote, but loses 1 seat, putting it **on par with ECR**, doubling its 2019 result.
- S&D and Renew plummet in the popular vote but retain 1 seat each, while both the junior coalition partner Greens and the far-right (NI) win 1 seat.
- EVP Dombrovskis (EPP) likely to retain an important role in the College of Commissioners.

 **Cyprus (6)**



- The EPP maintains 2 seats in Cyprus as both Left and S&D drop to just 1 seat in an election that sees the country's **main parties lose support**.
- Independent candidate Panayiotou won 1 seat with 19% of the vote.
- Commissioner Stella Kyriakides could clinch a second term but faces competition within own party.

 **Malta (6)**



- **S&D and EPP share the spoils** of the EU elections.
- The tied results may unsettle the ruling S&D, given Roberta Metsola's EPP has gained back a seat from the S&D who had won 4 in 2019.

 **Slovenia (9)**



- The Slovenian centre-left government suffers a **defeat from the conservative opposition** in a vote loaded with national themes taking place alongside three national referenda.
- The opposition EPP wins an additional MEP. While the governing Renew maintains its 2 seats, its coalition partner from S&D loses 1 MEP.

 **Estonia (7)**



- Renew loses 1 seat as the PM Kaja Kallas' party **loses ground** since the last general election.
- EPP becomes largest party finishing ahead of the governing S&D.
- Kallas is still considered as one of the top candidates for the EU Foreign Policy Chief role.

 **Luxembourg (6)**



- EU elections results largely **mirror the outcomes of October 2023 general elections**, which led to an EPP-Renew governing coalition.
- EPP, Renew and Greens replicate 2019 results, while ECR enters the EP with 1 seat, to the detriment of the S&D which loses 1 MEP.



KEY MEPs

While it is still too soon to fully assess the composition of the next EP, the preliminary results suggest that **several key MEPs that have held leadership positions in the outgoing EP will return**. The MEPs in question are as follows (non-exhaustive list):

Bureau



Committee Chairs



Conference of Presidents



POTENTIAL COALITIONS

While the EPP may have been the clear winner of the elections, the group remains far from obtaining a majority of 361 votes required to pass legislation in the next EP. This means that instead of legislating alone, **the EPP will have to rely on other political groups and form coalitions.**

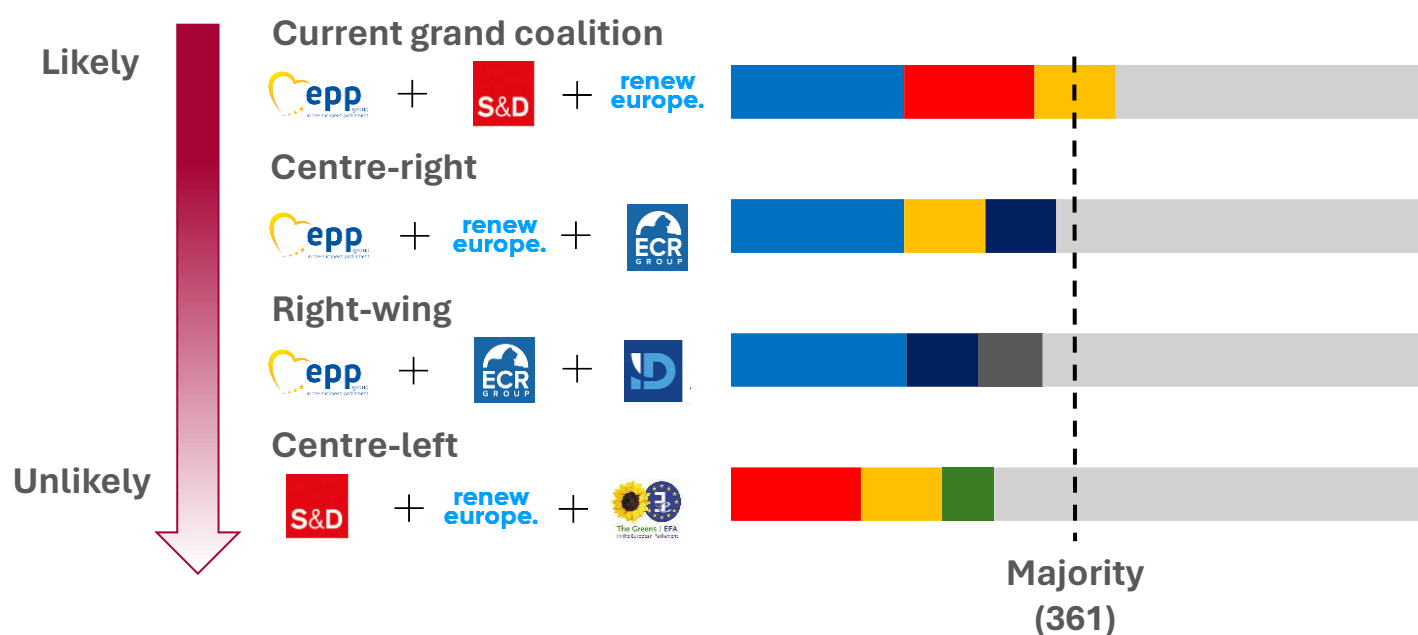
The EU decision-making process is, unlike most others, not characterised by a clear distinction between government and opposition parties. Instead, coalitions can (and tend to) be rather fluid or dynamic, with several potential ways of reaching a majority on a given issue. In other words, **there could be a number of potential coalitions at play, depending on the situation or issue in question.**

Given the election results, **the most likely (or rather, most common) coalition will be the so-called (super) grand coalition, which gathers the EPP, S&D and Renew.** This has been the basis for the vast majority of EU policymaking over the past term and is expected to continue for the upcoming **negotiations on top jobs as well as on the drawing up of the key priorities in the next policy agenda**, which will range from defence policy to the next long-term EU budget.

However, the EPP and S&D have been increasingly at odds with one another on some policy issues, such as climate. Given this increased discrepancy and the election results, **the EPP could form an alternative majority with Renew and ECR, on a file-by-file basis.** This could be particularly relevant on issues pertaining to competitiveness or industrial policy, for example. While this centre-right coalition does not yet have enough seats for a majority, it could get there if ECR gets some new parties.

There is no doubt that **the S&D (and the Greens) will oppose this centre-right coalition but will not be able to offer an alternative on the left.**

Another possible scenario would be a **hard-right coalition involving the EPP, ECR and ID.** While not **impossible on an ad-hoc basis, this alliance is unlikely** because of (at least) two reasons: (i) (many in) the EPP may not want to openly cooperate with ID fearing this could jeopardise their relationship with the S&D and even Renew and (ii) (many in) ID may prefer remaining a 'blocking group' rather than one that cooperates with the EPP.



TOP JOBS

The EU elections mark the beginning (rather than the end) of the institutional changes that will shake-up the EU institutions this year.

Straight after the elections, **political groups will gather to discuss membership and priorities**, ahead of the constitution of the new EP in mid-July. Between now and then groups will be busy trying to entice different national parties to join them – presumably by making concessions on certain positions or by offering them positions such as group committee coordinators.

EU leaders will also meet in June to discuss the allocation of the top jobs (i.e. Presidents of the Commission, Parliament and European Council, among others). All (or some) of the key nominations are expected to be formalised during the 27-28 June European Council. For now, **the role with most potential candidates seems to be that of the next European Council President**.

During the first EP plenary in July, MEPs will vote on their own President, with **Roberta Metsola set to remain for another 2.5 years** (while the S&D could take over for the second half of the mandate). The EP will also have to **schedule a vote to confirm the European Council's nominee for Commission president**, which could come as early as 18 July but could also be delayed to September.

As things stand, **President Ursula von der Leyen seems to have a strong incumbent advantage**, but her climate-friendly Commission has not pleased many in the right and the left is increasingly concerned with her potential change of priorities going forward.

Once the Commission President is endorsed, the EP will host public hearings with **Commissioner-designates appointed by national governments** (expected in September/October) and vote on the **College of Commissioners as a whole** (expected in November). The President will decide on the Commissioners' portfolios.

Front-runners (non-exhaustive)



European
Commission



European
Parliament



European Council



Ursula von der Leyen
Current President



Roberta Metsola
Current President



Mette Frederiksen
Prime Minister



Kaja Kallas
Prime Minister



António Costa
Former Prime
Minister

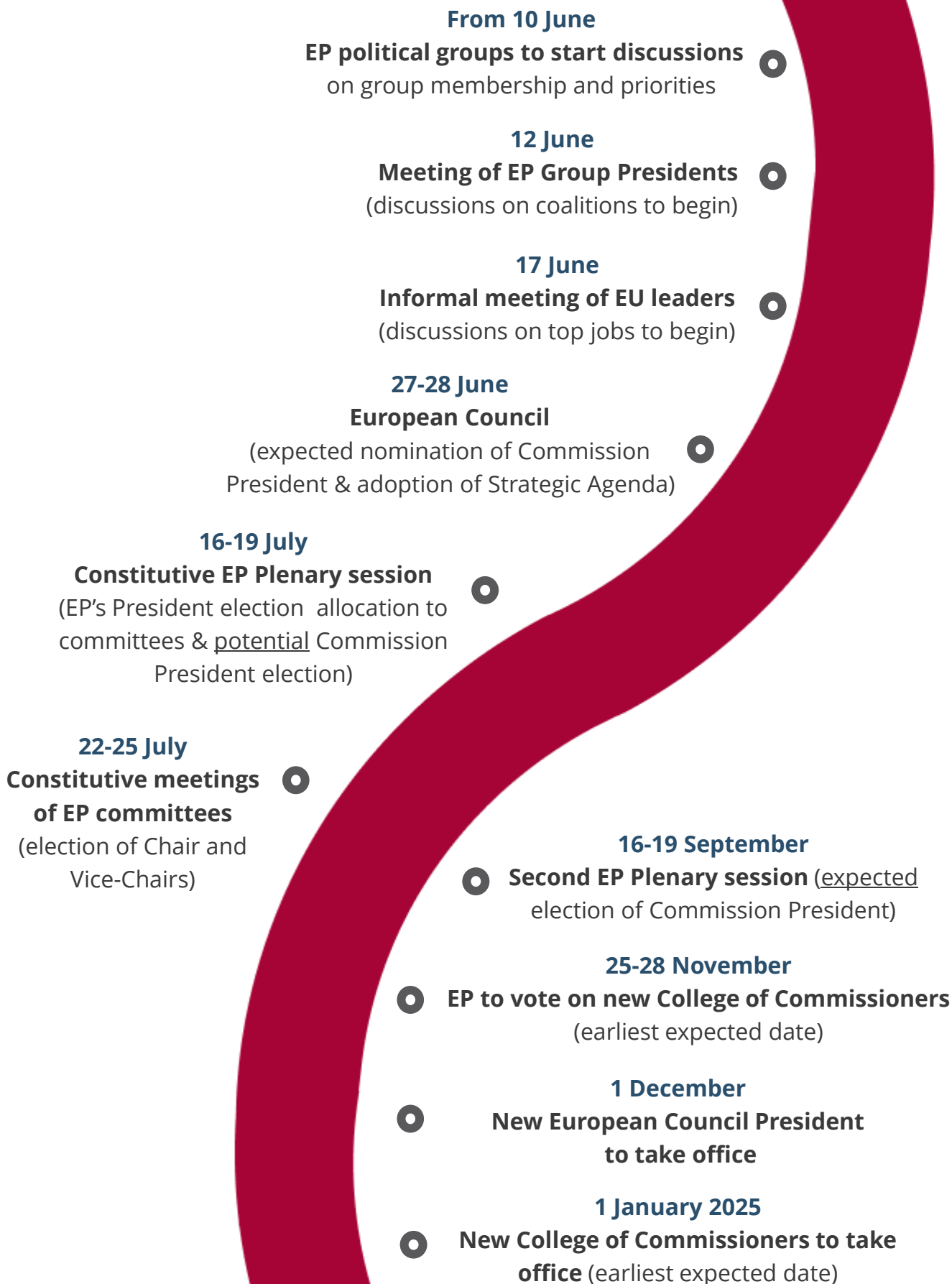


Alexander de Croo
Former Prime
Minister



Mario Draghi
Former Prime
Minister

NEXT STEPS



Any questions? Get in touch with our elections team!

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