

European Elections Plunge the EU into a Political Crisis

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The European elections have deeply shaken the EU, especially Germany and France. While the "Ampel" party in Germany is coming out of the election with massive losses, President Macron has even dissolved the National Assembly in France and called new elections for the end of June. Two serious government crises in the two largest and most important member states are plunging the EU into a political crisis at a time of internal weakness and external threat. It is a dangerous moment of political instability for the EU, but also a moment of truth. However, the shift to the right points to deeper dangers and should not lead to simple party-political conclusions at a time when Europe is lurching and when the enemies of freedom and democracy are waiting for Europe to weaken. As the writer Salman Rushdie recently put it, the world is experiencing an "angry moment" and a "war of stories", a war of interpretations. There are three key lessons to be learnt from the election:

- ▶ The EU must not break up now. However, the danger is greater than it may seem, as the election not only has a direct impact on the composition of the European Parliament, but also has an indirect but very strong effect on national politics in the member states. The consequence of the election result in many member states will be an even stronger domestic political orientation and the defence of national economic interests. The re-nationalisation of politics that has been observed around the world for some time now also threatens to reach Europe. For the EU, a return to nation states would ultimately mean the death of Europe.
- ▶ The next Commission must once again strengthen the EU at its core and formulate an agenda for sovereignty and competitiveness, because otherwise the EU is in danger of being crushed in the tough geopolitical dispute between the USA and China right now, at this moment of internal weakness. Mario Draghi will present a report on this that could have an almost programmatic character for the agenda of the next Commission.
- ▶ Politics itself must change. In recent years, it has become increasingly dirigiste, bureaucratic, overbearing and unrealistic. Not the goals themselves, but the path taken is increasingly being perceived as an aberration. Growing concerns about jobs and security are being met with an increasing loss of trust in politics. Party-political attempts to explain that they have not been able to emphasise their own policies clearly enough are dangerously short-sighted from an analytical point of view. The concerns go deeper and they are justified.

The European elections have sent shockwaves through the governments in the EU. The EPP is clearly the strongest group in Parliament, but its power is likely to be less than it seems. It is true that politics as a whole will become more conservative and the EPP will partly slow down and partly reverse some developments. But it will also have to play a risky game between the weakened centre to its left and the strengthened fringes to its right. Whether von der Leyen still has enough political capital in the Council and Parliament will be an interesting question in the coming weeks.

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1 The German perspective: The debacle of the traffic lights as a lesson for a faltering course in EU policy

1.1 European policy failure of the German Ampel Coalition: What the German result means for Europe

The German result in the European elections comes as no surprise, but the clarity of the result resembles a political earthquake. The three "traffic light" parties have lost a significant amount of support and, as a result, have dramatically lost support as a government. Even if the result is essentially due to dissatisfaction with domestic politics and was hardly a vote on the policies of the incumbent EU Commission, it still has a major impact on Europe. In response to the result, German policy could in future be even more inward-looking and even less European-orientated than it already is. If the other large member states such as France and Italy do the same, driven by the result of the European elections, the global trend towards the re-nationalisation of politics would have finally reached the EU. However, the opposite would be true: Germany urgently needs to become much more involved in Europe again. The German government has often been criticised in Brussels as a failure in European policy. The extent to which Germany's well-being is historically linked to the well-being of Europe was recently demonstrated when the seventy-fifth anniversary of the German Basic Law was celebrated and last week the eightieth anniversary of the Allied landings in Normandy. There were just five years between these two events, the day of the liberation of Europe and the beginning of German democracy.

1.2 Germany weakened in Europe: What the European result means for Germany

The European elections have brought a clear shift to the right - in almost all member states. The established parties must not close their eyes to this. Even if the new distribution of seats in Parliament does not mean a landslide, the impact on the political majorities is considerable. The programme of the next Commission will not have to overturn everything, but in some policy areas it will set significantly different priorities and emphases than the current one. The most important of these relate to migration policy and climate policy. While European migration policy is likely to be much more restrictive in the future, climate and environmental policy (keyword "combustion engine phase-out") will probably no longer be an absolute priority. This course correction in the EU would also affect the policies of the German government, which would be required to adapt its policies to the new European agenda or to distance itself more clearly from it, which would entail political and economic risks. The balance of power in the EU is shifting.

1.3 Internal weakness and external threat: what needs to happen in Europe 2024-2029 from a German perspective

The challenges for the next Commission will be immense. Above all, it is about an agenda for more European sovereignty and competitiveness. Furthermore, in view of this election result, it will now be a matter of protecting and strengthening the political unity of the EU. From a German perspective, three fundamental reactions are now required: firstly, to stabilise the EU in its political crisis; secondly, not to abandon the previous agenda, in particular the "Green Deal", but to continue it more pragmatically than before; and thirdly, to change the policy approach from regulation, which is perceived as too dirigiste and overbearing, to more regulatory and competition policy. For the German and

European economy, a rapid reduction in bureaucracy and a significant improvement in the conditions for doing business in the EU are extremely urgent. All in all, only one conclusion can be drawn from the election: Germany urgently needs to take a renewed interest in Europe and become more involved - in its political role vis-à-vis the member states and in the interests of German SMEs.

2 Italian European election Results

The results of the Italian elections to the European Parliament (EP) show a clear victory for the radical right-wing party Fratelli d'Italia (Fdi), led by Prime Minister Giorgia Meloni, with 28.8% of the vote, followed in second place by the Partito Democratico (centre-left) with 24%. Meloni's allies in the governing coalition, Forza Italia (centre-right) and the League (radical right), received 9.7% and 9.1% respectively. The 5 Star Movement (9.9%) and the Green-Left Alliance (6.6%) also break the 4% barrier, while Stati Uniti d'Europa and Azione, two lists with a predominantly liberal orientation, remain below the threshold. 49.7% of the electorate went to the polls.

2.1 Italy's role in European political alliances

According to the results, Fratelli d'Italia is expected to win 28 seats in the next European Parliament, allowing Meloni to position herself as the undisputed leader of the Conservatives and Reformists group. However, it remains to be seen how Meloni will be able to assert this leadership in the forthcoming European alliances. Shortly after the polls closed across Europe, Ursula von der Leyen declared her intention to work on her confirmation as head of the European Commission by first consulting the groups that will form her majority in 2019, namely the European Socialist Party and the Liberals of Renew Europe. These, together with the European People's Party, would indeed have the numbers to form a majority in the next legislature (403 seats according to current estimates, 43 more than needed to form a coalition to re-elect von der Leyen). This would not be good news for Meloni, as it would mean taking part in the new "Ursula majority" of the Socialists, including the PD, their main opponent in Italy, which should elect 22 MEPs - one of the largest groups within the PSE, given also the debacle of the SPD in Germany. Meloni's hope of re-forming a centre-right alliance in Brussels, like the one currently governing Rome, therefore seems to be out of the question, as a coalition between the EPP, the Conservatives and Reformists and the other far-right group Identity and Democracy would fall 46 seats short of a majority. Von der Leyen's statements on Sunday evening sounded different from what she had said in the days leading up to the vote, when she indicated that she would be willing to accept the support of politicians (she did not speak of groups) belonging to political families other than those of the "Ursula majority" if the conditions were met. However, if the decision to try to regain the same majority as in 2019 is confirmed, despite the success achieved, Meloni would remain in opposition in the next European Parliament, not least because many on the left have indicated that they would not be willing to participate in coalitions in Brussels that would involve the current head of the Italian government in any way. On the other hand, Forza Italia, the party founded by Silvio Berlusconi and which has survived the death of its leader almost a year ago, will certainly play a role in supporting von der Leyen: as part of the EPP, its likely 8 seats will in any case contribute to the appointment of the next Commission President. Certainly, the remaining marginal players in Brussels are the League, which will lose 25% compared to 2019, and the Five Star Movement, which will drop from 17.6% in 2019 to 9.9%. The failure of Stati Uniti d'Europa and Azione to reach the threshold makes the two liberal lists partly responsible for the collapse of Renew Europe, which loses 22 seats compared to 2019, mainly due to the French result.

2.2 European implications of national European Parliament election results

The European elections in Italy could create a curious situation: Giorgia Meloni, a winner at home and an established leader within the governing coalition, could remain marginal in the formation of the new majority in Brussels. On the other hand, Elly Schlein's Democratic Party, Meloni's main opponent in Rome, could play a decisive role in negotiating the conditions for bringing back von der Leyen as head of the Commission. Indeed, looking at the positions of the two Italian leaders on the main European dossiers, it seems easier to imagine an understanding between von der Leyen and Schlein than between von der Leyen and Meloni, although the EPP's top candidate recently claimed to have worked well with the Italian prime minister. The collapse of the far-right Lega puts its leader Salvini in a difficult position: under his leadership, the party has steadily lost support in recent years, and it is no surprise that many in the Lega would like to see another secretary in his place. In an attempt to reverse this trend, Salvini may decide to further radicalise his policies, which could, however, create some tensions within the Italian government, as Meloni will not want to undermine the image as a pro-European politician that she seems to have painstakingly built up over the last two years. Certainly, on issues such as the Green Deal or the management of migration flows, Meloni is much closer to identity and democracy than to the positions of the Ursula majority: it remains to be seen whether Forza Italia's role as guarantor of the Italian government's Europeanism will be enough to compensate for any nationalist turn in the governing majority in Rome. The failure of Stati Uniti d'Europa and Azione to reach the 4% quorum is a serious blow to the Liberals and could teach their two leaders, Matteo Renzi and Carlo Calenda, to put aside their personalist velocities in future and form a single centre list that would have easily won at least three seats in Brussels. What was unexpected, however, was the performance of Verdi-Sinistra, which gained a flattering 6.6% by focusing on environmental and human rights issues, which are not usually among the most popular with the Italian electorate.

2.3 National implications of the European Parliament election results

As mentioned above, Meloni is further strengthened in relation to both the opposition and the government's allies. As the Italian legislature progresses, Fratelli d'Italia will dictate the domestic agenda even more, although looking at absolute numbers rather than percentages, Meloni has lost 800,000 preferences compared to the general election in September 2022. It is not clear whether the League's resounding defeat will lead Matteo Salvini, who is mainly responsible for it, to change his strategy: whether he decides to continue supporting the government or to leave it in order to demonstrate his difference from Meloni, he would still risk paying a very high price and losing the party leadership. Elly Schlein came out of the European elections well, strengthening the Partito Democratico as the second force in Italy and also holding its own against the 2022 political vote. It was also a success for Antonio Tajani, who kept Forza Italia going after the death of its founder, Silvio Berlusconi. A prestigious role in Brussels is therefore not out of the question for Tajani, even if he has to leave his privileged position as foreign minister in Rome. Bad news for the Italian liberal wing, whose internal divisions contributed to the failure to pass the 4% threshold and the collapse of Renew Europe in the next EU Parliament. A final observation concerns the position of the Italian government in the next Council, which will apparently be led by a conservative majority: but conservative forces largely belonging to the EPP and not to the conservatives and reformists. It remains to be seen whether or not Meloni will decide to follow her new pro-European course and be part of the solution to the EU's problems.

3 Implications of the French election results: turbulent times ahead for France and Europe

3.1 Domestic impact: Double or nothing for Macron with snap legislative elections

3.1.1 The first real defeat of President Macron, who revisits De Gaulle's 1969 resignation in return

The very low score of the list of the presential majority (14,5%) compared to the triumph of the far-right "Rassemblement National" (RN) with 31,5% led the President Emmanuel Macron to an unprecedented political move. In a very brief intervention, he dissolved the National Assembly and called for snap legislative elections in three weeks for the first round (June 30th) and in four weeks for the second round (July 7th), in order to bring a new majority – if possible – to the French before the Olympic Games this summer. Why now? Because – Olympic Games aside - he knew that waiting until next fall would already have made him a "lame duck" without international nor national influence, a situation that is hardly recoverable once it is established.

Is that move very surprising? It is bold, but not entirely surprising. One shall not forget about the very nature of the French 5th Republic: every election is national and plebiscitary – even municipal ones -, in a very Napoleonic tradition. Hence, as Macron endured his first real defeat last night, he saw his capacity to govern almost annihilated. Said otherwise, next October, with the new session of the Parliament, his government would have faced very difficult political maneuvering - to pass the budget for instance -, while street protests from a new kind of Yellow Vests could have intensified the pressure weighing on his power – a very likely scenario given that the "whatever it takes" fiscal period is now over. Somehow, by impulsing political change after a mid-term political defeat, he reminds us of De Gaulle's 1969 resignation, which intervened after a not-so-significant referendum on regionalization. At the time, De Gaulle resigned because he saw this defeat as a personal rejection and disaffection from the French. Macron called snap elections essentially for the same reason.

3.1.2 A risky political move, with a high probability of full marginalization for the French President

Therefore, this move is very risky, and Macron certainly sees it a "double or nothing": either he is able to gather sufficient parties around his own in the perspective of a "Sacred Union" government to counter the RN – in reference to the government of World War One – and gain political leeway to further govern, or he cannot, in which case he loses most of his power. Indeed, if he loses in three weeks, he shall only be a president with some blocking power – and usually a prerogative on defense and foreign affairs which will hardly be implementable with a RN government -, or even worse, a president with a hung parliament, who would only have as solution to resign. This could open the door to new presidential elections, and maybe to Le Pen coming to power in full swing with both the Presidency and the Parliament in her hands. Having a unified RN executive is dramatically different from only winning legislative elections for them, with far more dramatic consequences for French policies overall.

Therefore, calling snap elections is for Macron the only way to avoid from becoming a new sort of "François Hollande". On the other hand, it can also kill him politically, with a disappearance from the main stage, while France turns to the far-right. Of course, he hopes that his "sacrifice" shall help the

French realize that the RN represents an “impoverishment and marginalization” of France, as he likes to regularly coin it. If the RN exercises power between 2024 and 2027, he maybe hopes the French will choose an alternative for the next presidential elections if he does not resign in the meantime.

3.2 European impact: Big loss of French influence in Europe in case of legislative defeat for Macron

3.2.1 A French government’s influence in the future Parliament that ranges from reduced to inexistent

The size of Macron’s presidential majority delegation in the European Parliament (14 seats, -9 vs. 2019) will dramatically reduce its influence both within Renew and for negotiations within the coming coalition. Indeed, even if the French liberal delegation might remain the greatest national group within Renew, its shrunk size will reduce its sway over the party. Besides, Renew is now the fourth party in the Parliament, behind Meloni’s ECR, which may unite with Le Pen’s ID, and maybe even with Weidel’s AfD would they finally reintegrate ID. Overall, the influence of the French government with the Parliament shall diminish.

However, it is very likely that the next coalition in the Parliament will count Renew as pivot party, between S&D and EPP, like for the two previous legislatures. Therefore, Renew, and Macron’s delegation inside it shall keep on playing a role in coming years. But without a favorable French government to back it, would the current majority lose in three and four weeks, its political consistency might decay over the next years.

Regarding Le Pen’s ID, its potential association with Meloni’s ECR shall not be sufficient to create a blockade minority in the Parliament. Hence, the far-right party will not be key for the next legislature. Even if the RN wins the coming legislative elections in France and forms a government, this will not change the situation. This would be disastrous for the French influence in the Parliament.

3.2.2 Expected disagreements between Macron and a potentially far-right French prime minister in the European Council, with negative repercussions on European progress

Regarding the influence of France in the European Council and for the nomination of the next Commission, if Macron loses the next legislative elections, it is very likely that the influence he developed in European politics and policies will not immediately be replaced by an equivalent one from a RN prime minister. Indeed, it is in the scope of the president to sit at the Council, but it is also the first time that the government could potentially dramatically diverge in terms of European policies compared to the president. Hence, it is impossible to say how the French dual executive will manage this situation in the Council. Whatever happens, a potential RN prime minister would belong to a political family which is usually marginalized by the European bubble, and by other European governments – like it happened for instance for the Austrian government at the beginning of the 2000s. Therefore, the role of France in impulsing European politics and policies, as well as in the formation of the next Commission, will be diminished.

3.3 Conclusion: the fate of France and Europe will be decided on July 7th

Finally, it must be emphasized that all this hangs on the results of the coming legislative elections. Macron also called them because he knew he would be paralyzed at the European stage with the score his list just had in the European elections. Either this marginalization is confirmed, or his power is renewed - at least partially – and he can still count in European affairs.

If he loses the next legislative elections, it is hard to see how the EU could find the impulse to move towards increased integration over the next five years. Is Europe, indeed, dying already? Maybe not. Macron counts on the French to wake up and take responsibility in three weeks.

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