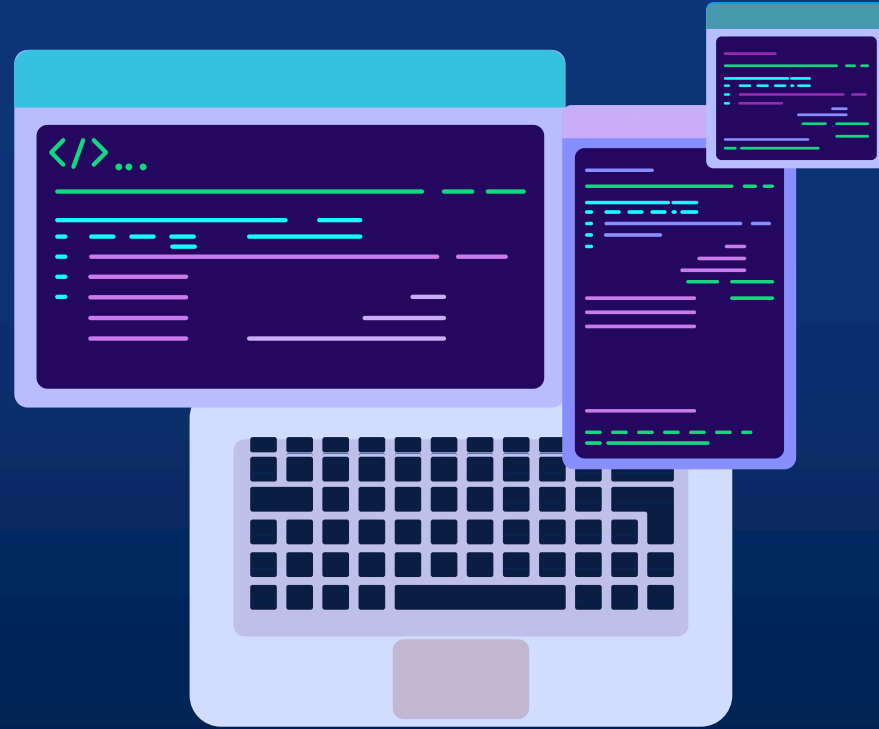


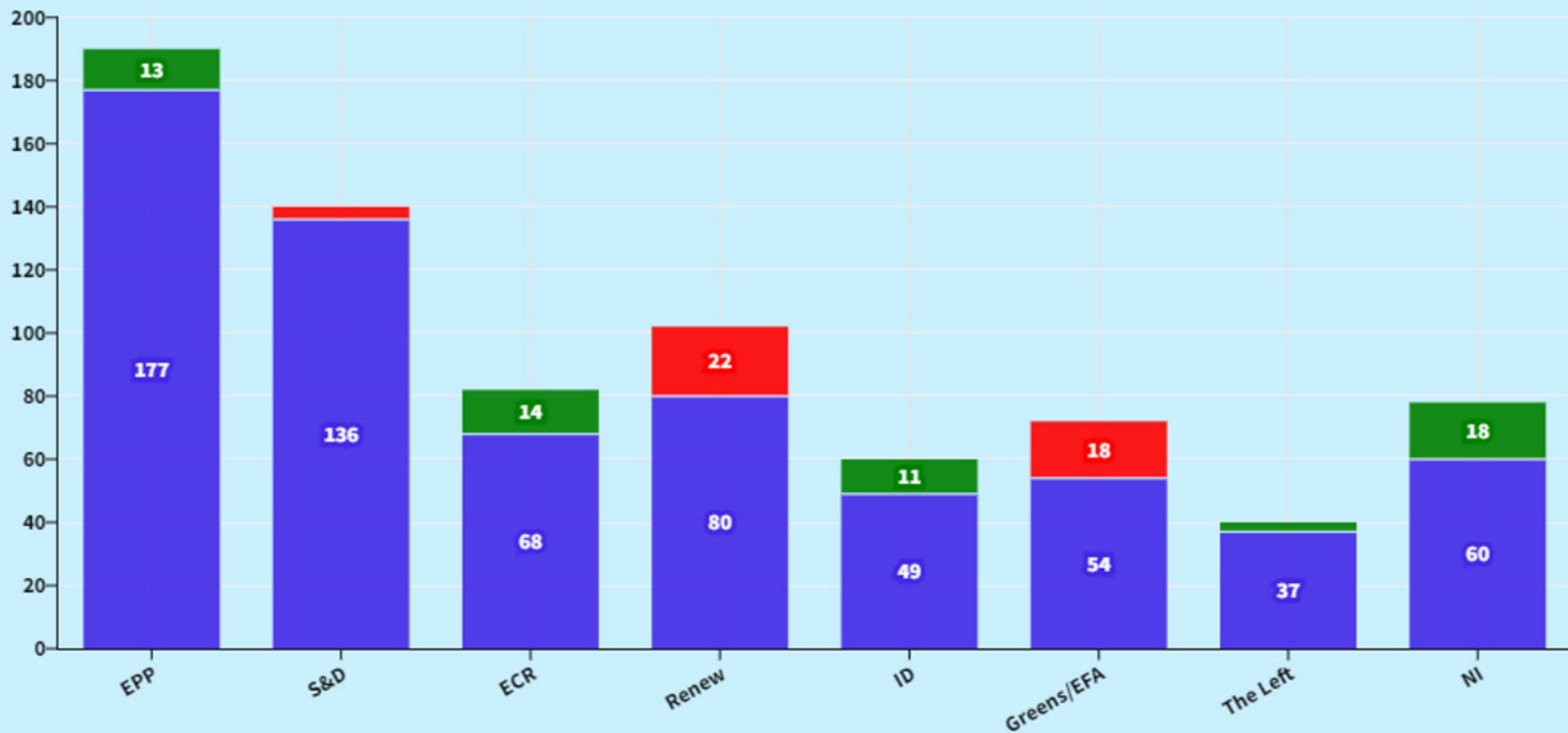
# EU 2024 election - changes in policies & people



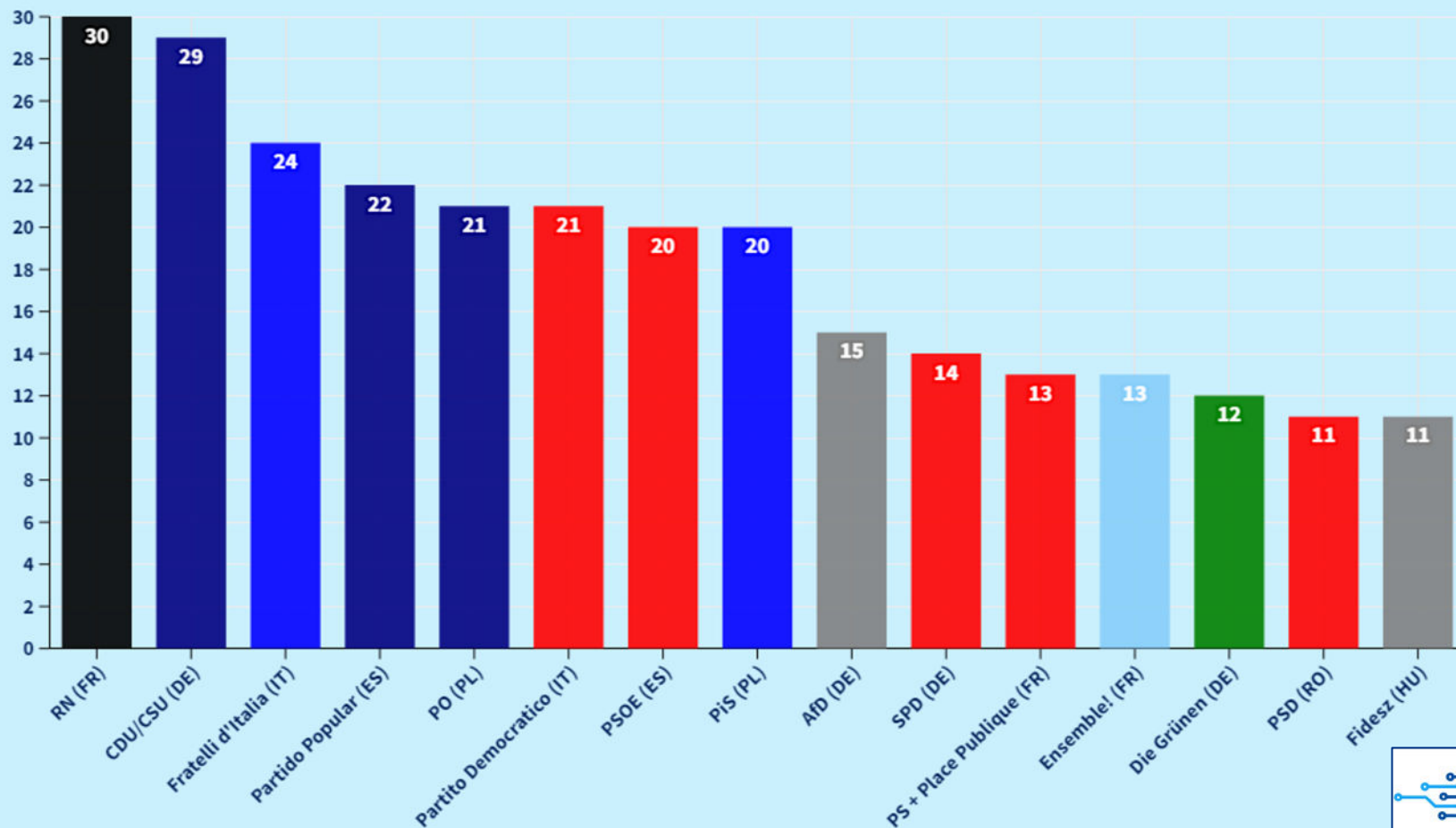
# Elections 2024: how did the political families perform?

## Balance of power among political groups after EP 2024 elections Based on current / intended affiliation

■ Number of seats ■ Seats gain ■ Seats loss



# Largest national parties after EP elections 2024

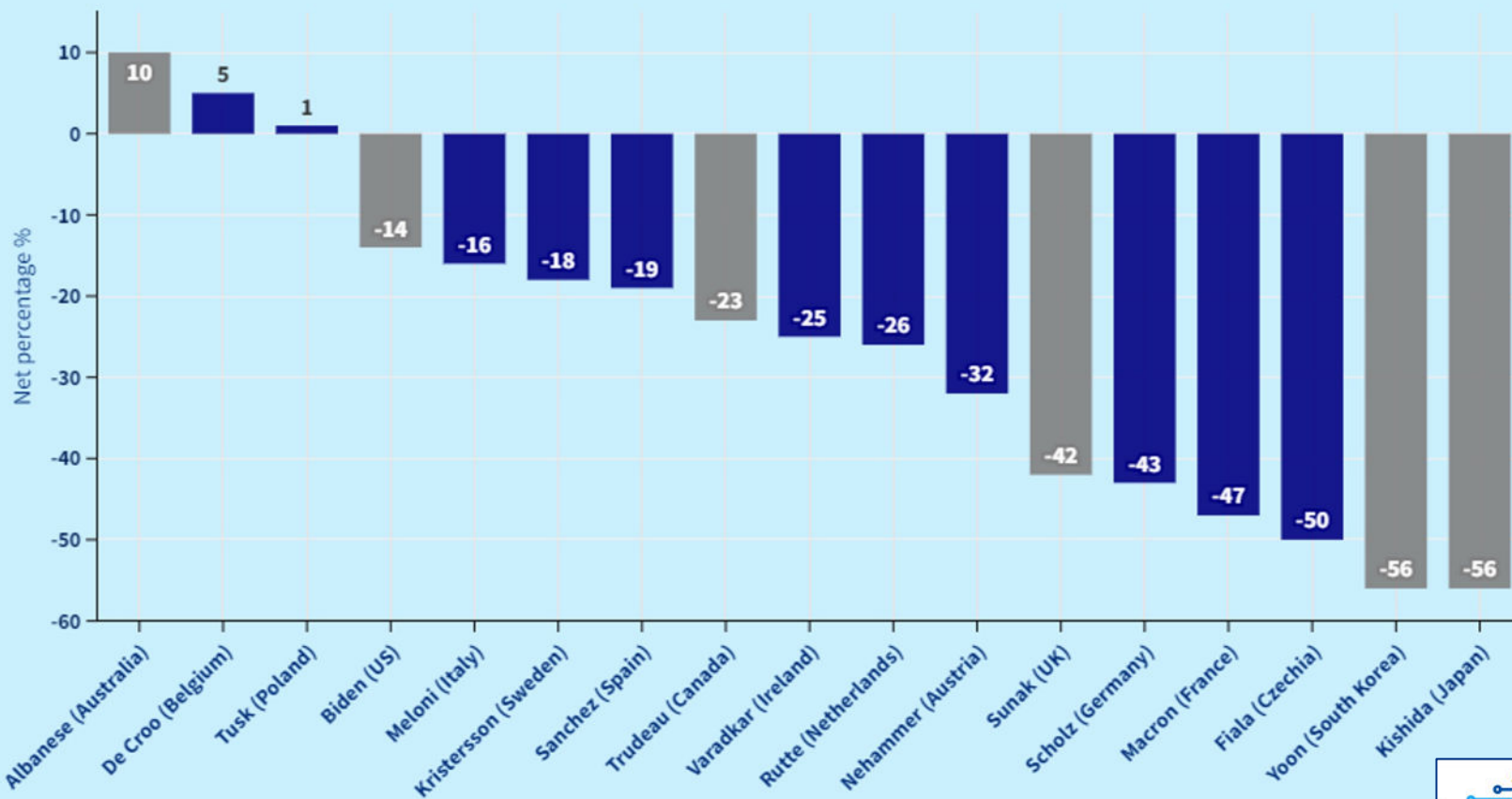


Why?

# Favorability of leaders from Europe (and allies)



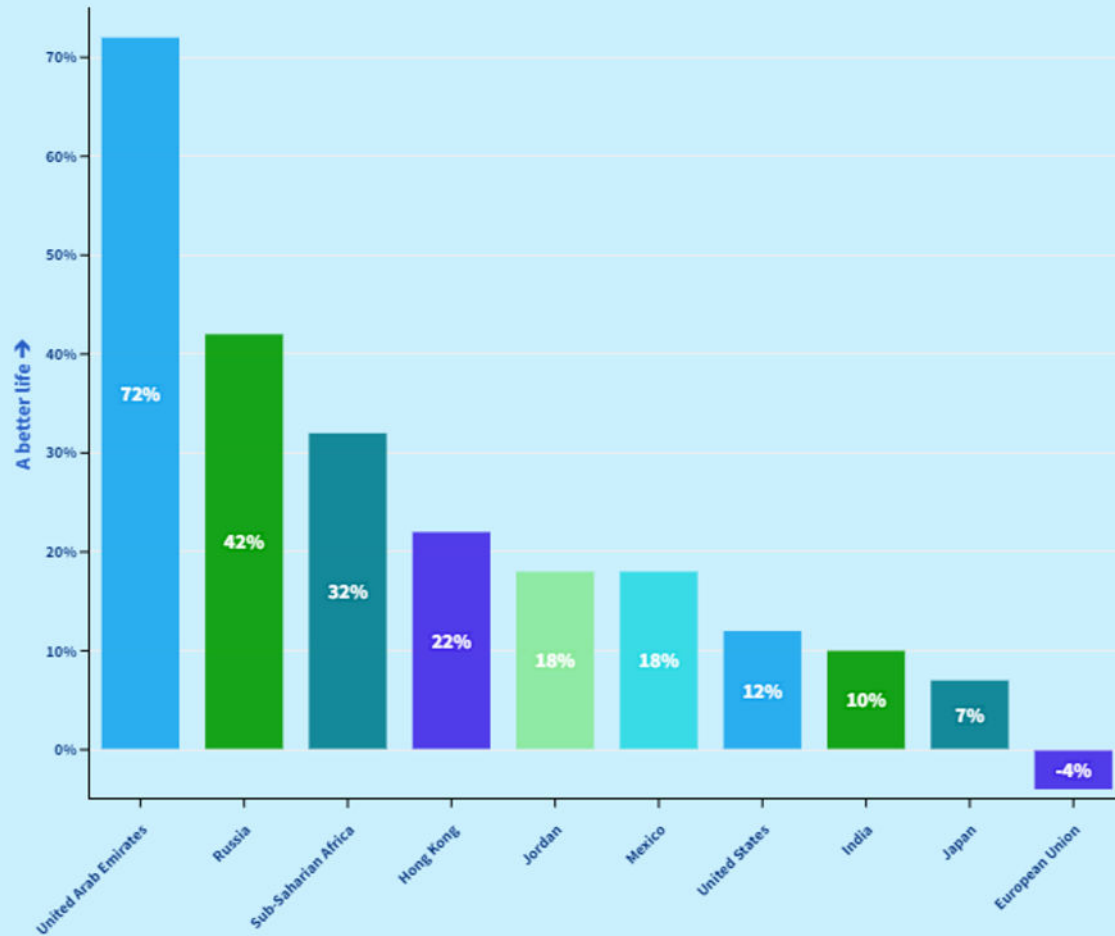
Net Approval (in %)



Data by Morning Consult (May 2024)



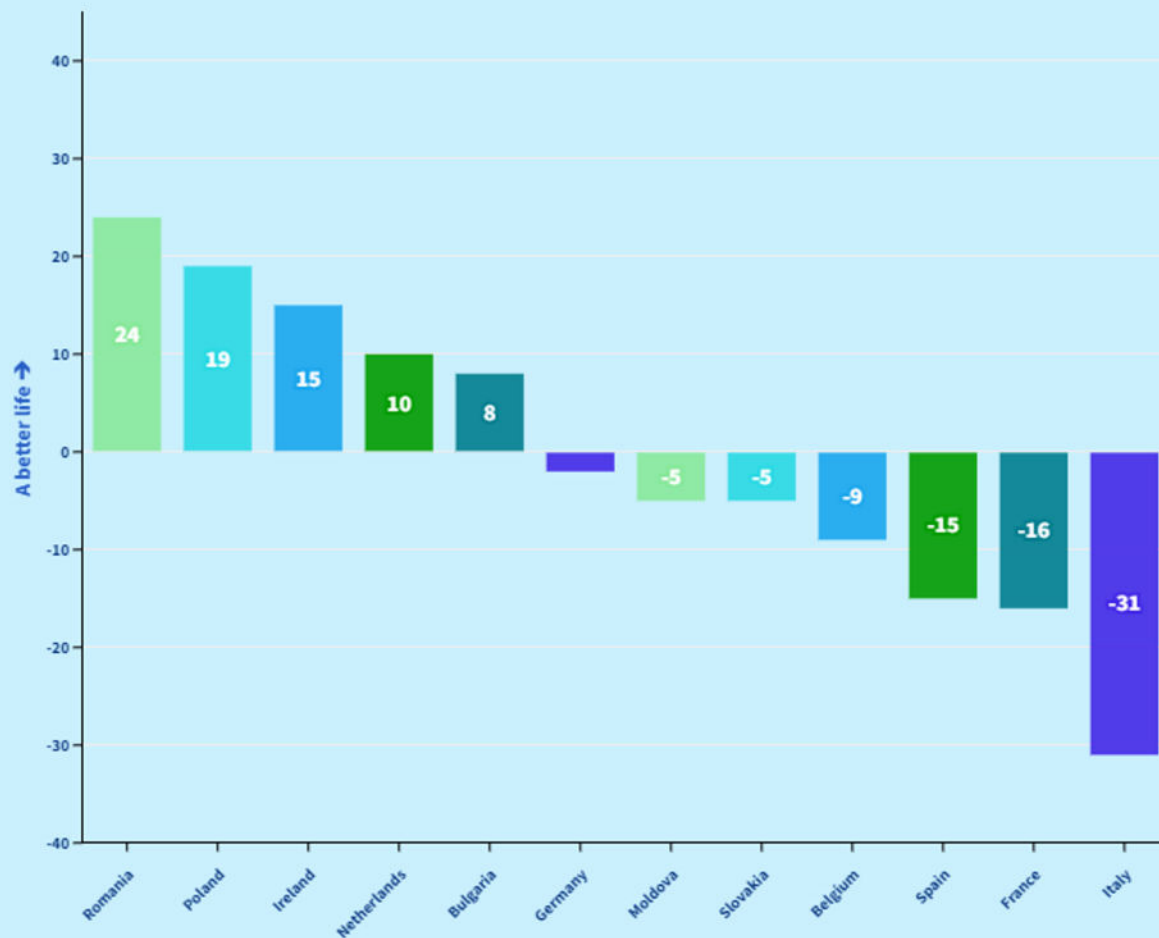
## Do you think children today will have a better or worse life than you? Respondents from different continents



Source: Gallup International 2022

# Do you think children today will have a better or worse life than you?

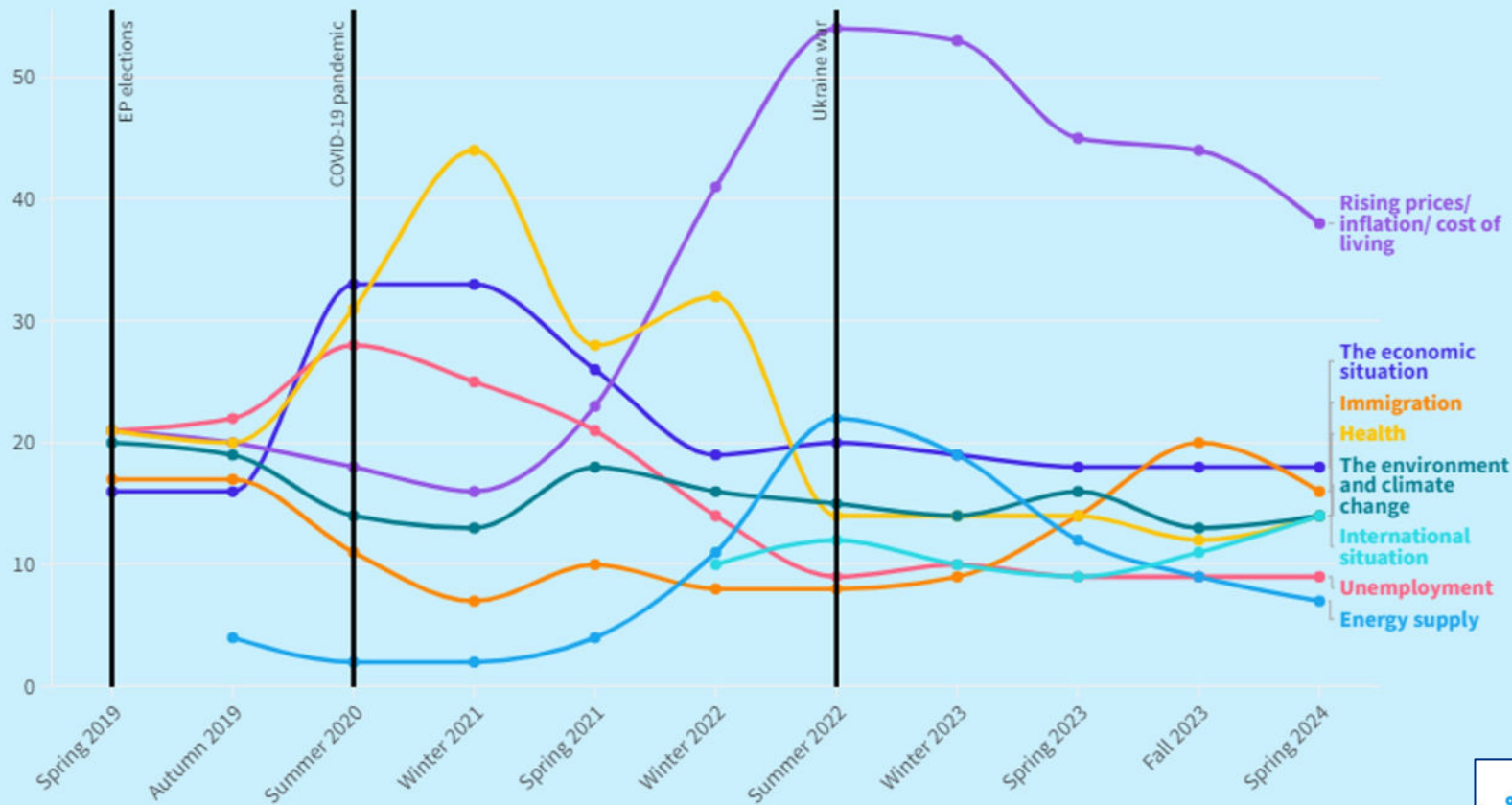
## Respondents from European countries





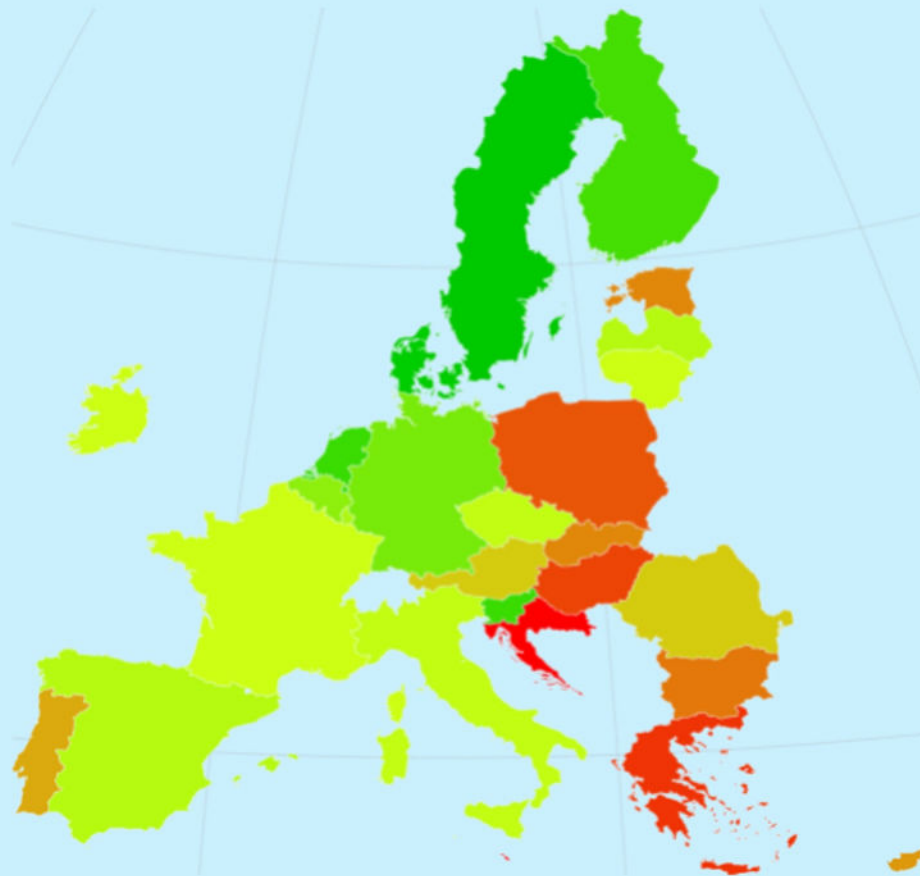
# What do you think are the most important issues facing your country?

■ The economic situation ■ Rising prices/ inflation/ cost of living ■ Unemployment ■ Immigration ■ Health ■ The environment and climate change ■ Energy supply ■ International situation



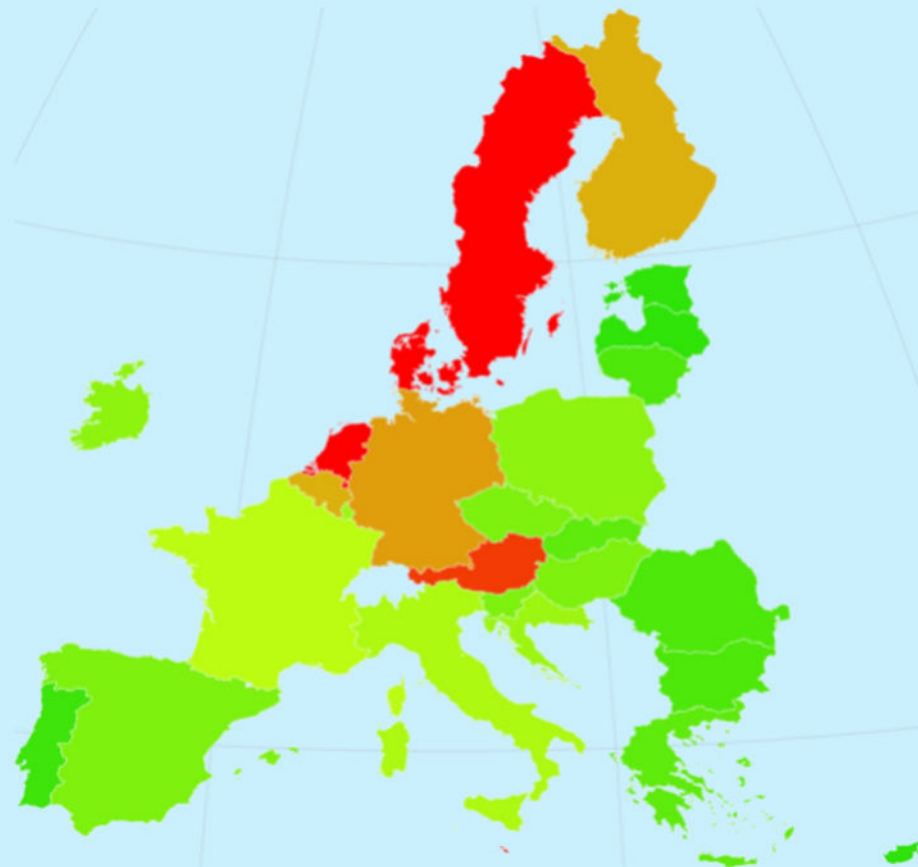
Source: Standard Eurobarometer 91-101

# Most important issues facing your country: rising prices, inflation and cost of living (%)



Source: Eurobarometer 101

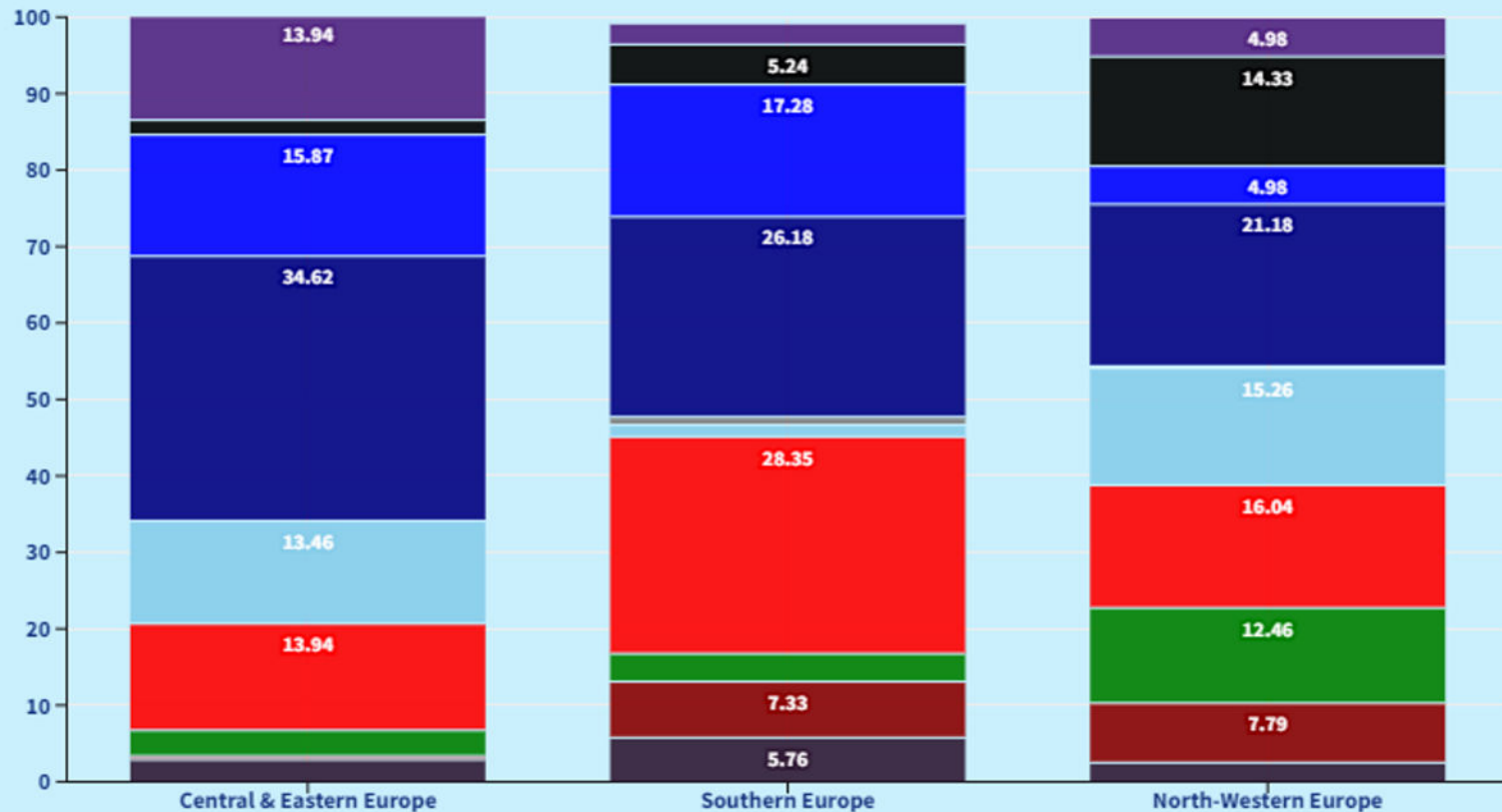
# Most important issues facing your country: the environment and climate change (%)



Source: Eurobarometer 101

# 2024 elections: strength of political group by region

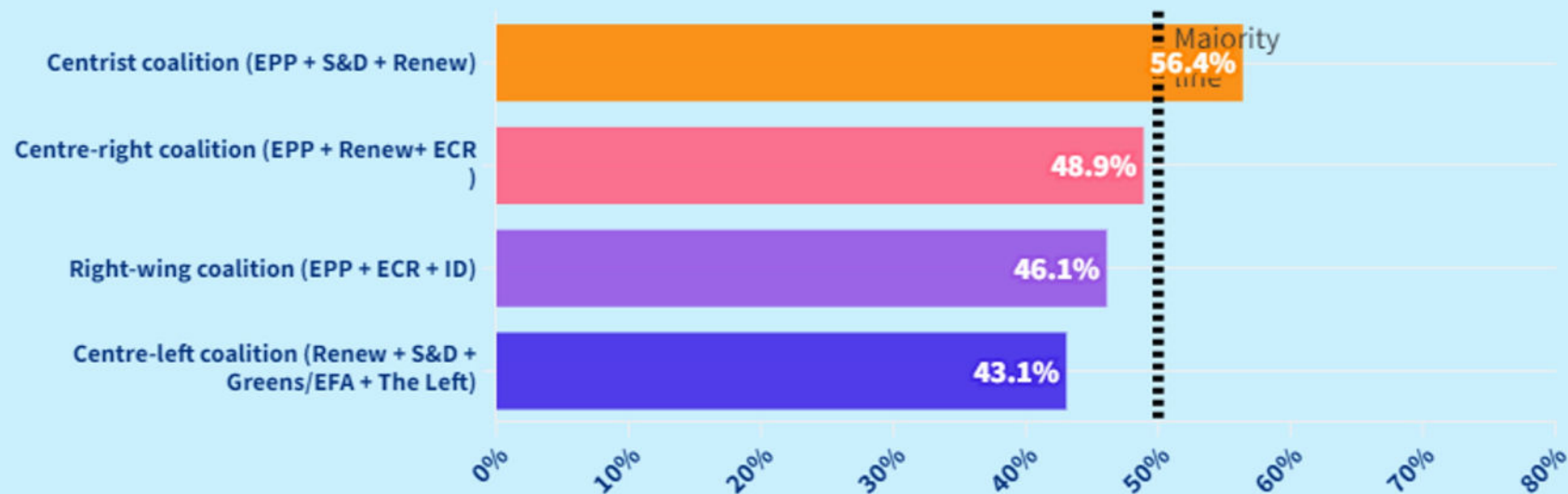
Series 1 NI (Left-wing) The Left Greens/EFA S&D Renew NI (centre) EPP ECR ID NI (right-wing)



Which groups will be key?



## Strength of coalitions after the European Parliament elections in 2024





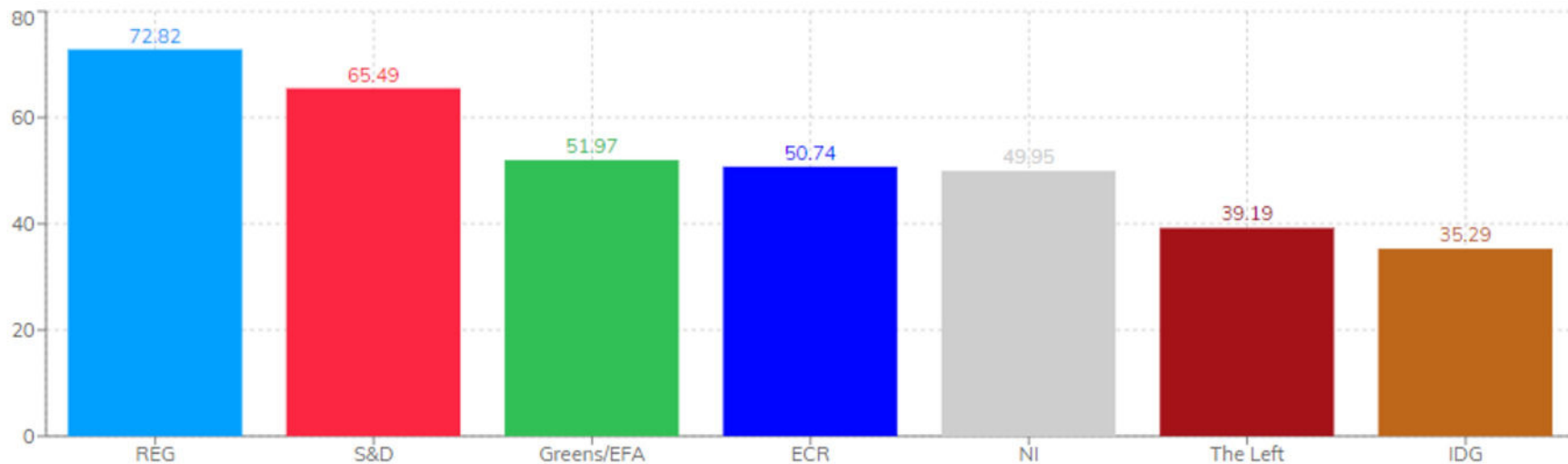
# Affinity between European political groups

Political group

Group of the European People's... ▼

Topic

Select... ▼

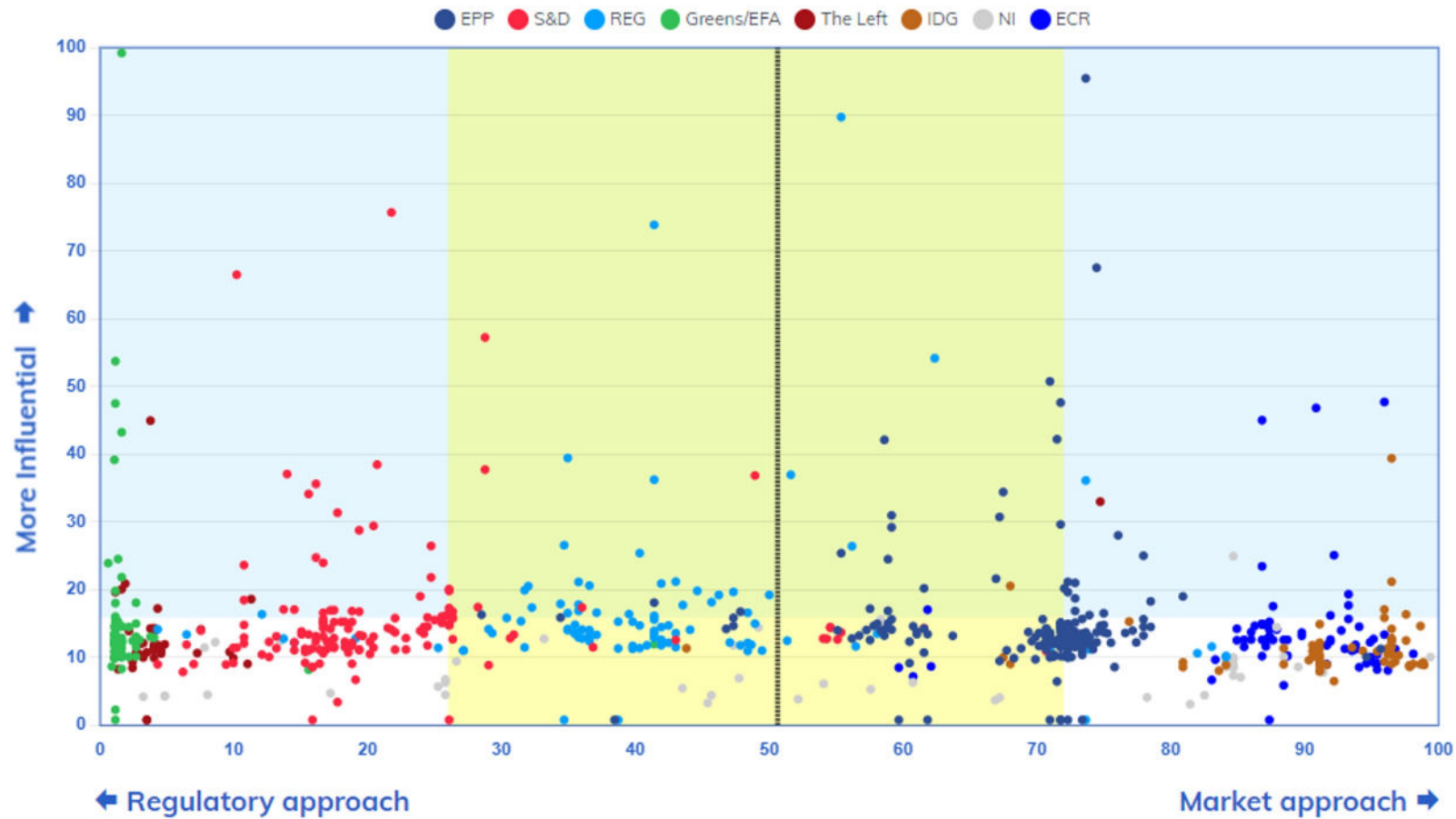




**BUT: MEPs don't vote as united political blocs !!**

- + many MEPs will be new.**
- + most MEPs belong to non-governing parties**







Super far-right group ?

Where do they agree and disagree?



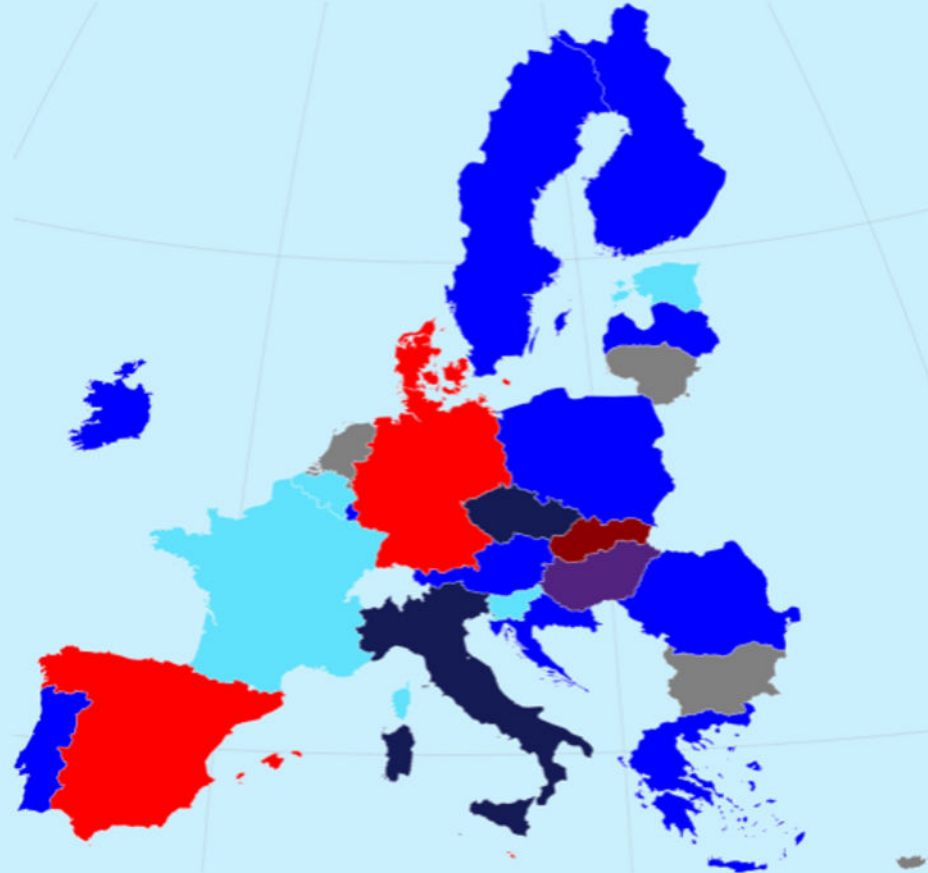
# Situation in the EU Council

## In the summer 2024 (forecast)

## Projected European political affiliation of the European Council members – end of June 2024

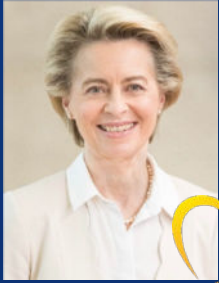


■ EPP ■ Renew ■ NI (Centre) ■ ECR ■ S&D ■ NI (right-wing) ■ NI (left-wing)



Note: Data elaborated in June 2024

# Potential leadership of the EU institutions



Ursula von der Leyen (DE)



Kaja Kallas (EE)



Antonio Costa (PT)



Roberta Metsola (MT)



Teresa Ribera (ES)



Thierry Breton (FR)



Valdis Dombrovskis (LV)



Mario Draghi (IT)

# Policy horizon: elections impact on the EU future policies

# High level priorities:

At declarative level, the political mood moves towards:

- **Competitiveness**: harmonisation, fewer bans & targets, less admin burden.

But also, subsidies and tariffs to counter subsidies and restrictions by US and China -> “level playing field”




# High level priorities: Competitiveness vs geopolitical economy

- Increasing security -> push to more autonomy, fewer dependencies => weakening free-trade narratives
- Germany, Netherlands tend to be supportive of open trade to support competitiveness.

France, Italy and Spain -> more protectionist.


Nordics and CEE traditionally pro-trade, but currently highly concerned by security







## In practice, security agenda impacting on economic governance:

- Likely regulatory push to:
  - Reduce imports from non-democratic countries
  - “force” repatriation of production in the EU
  - “Made in Europe” strategy and “Buy European” provisions
- 

- 
- Financing strategic sectors: defense, food, energy. From where ?
  - **Disagreements on funding will trigger key debates on:**
    - National and EU's priorities of public investments,
    - state aid rules,
    - National and EU taxes,
    - joint borrowing,
    - Flow of capital: capital markets (private sector).
- 



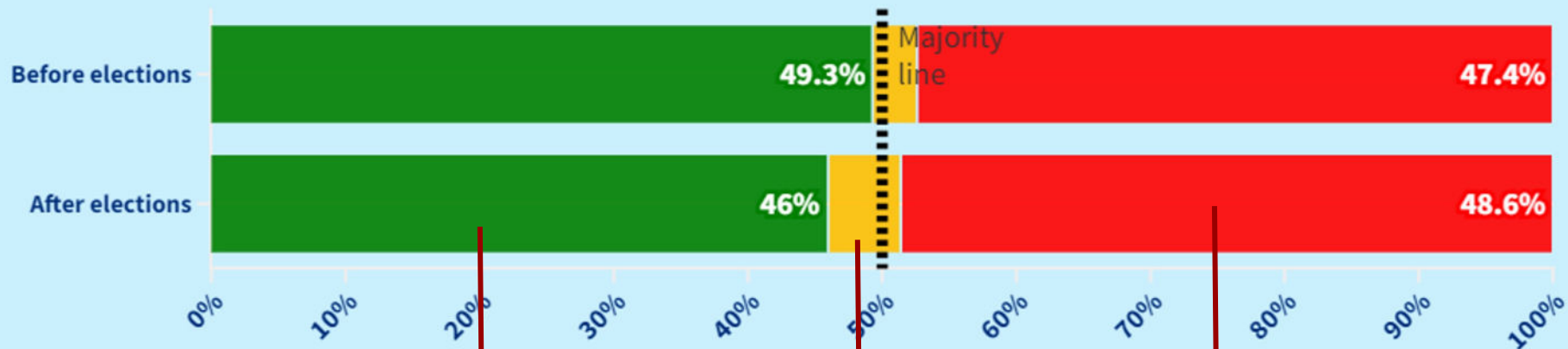
# Parliamentary arithmetics: what is the new balance of power ?



# Trade and sustainable development chapters of EU FTAs should be more effectively enforceable



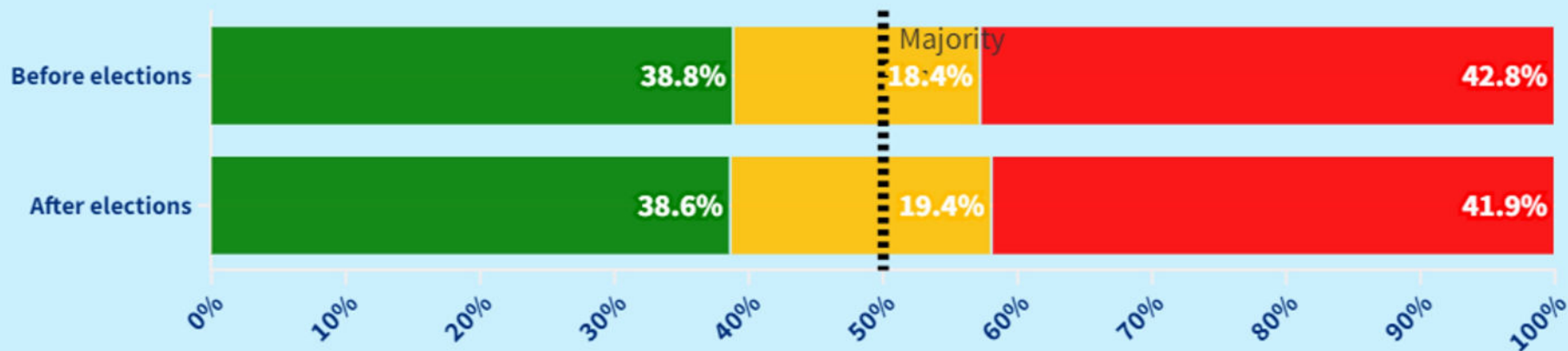
■ For ■ Abstain ■ Against



# Calls for negotiations on a FTA on trade, energy, investment and public procurement with the US



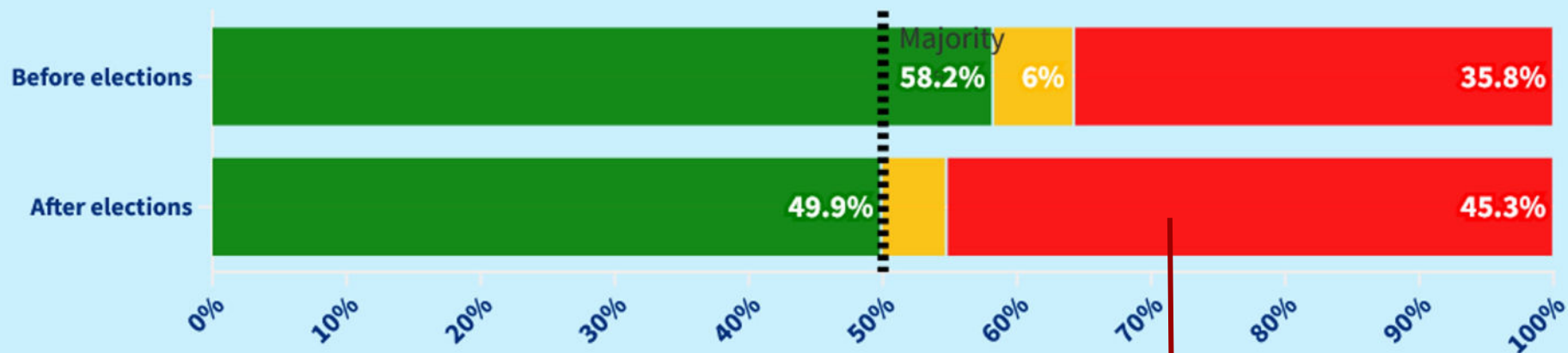
■ For ■ Abstain ■ Against



# Vote: Commission proposal on resolution "Corporate Sustainability Due Diligence"



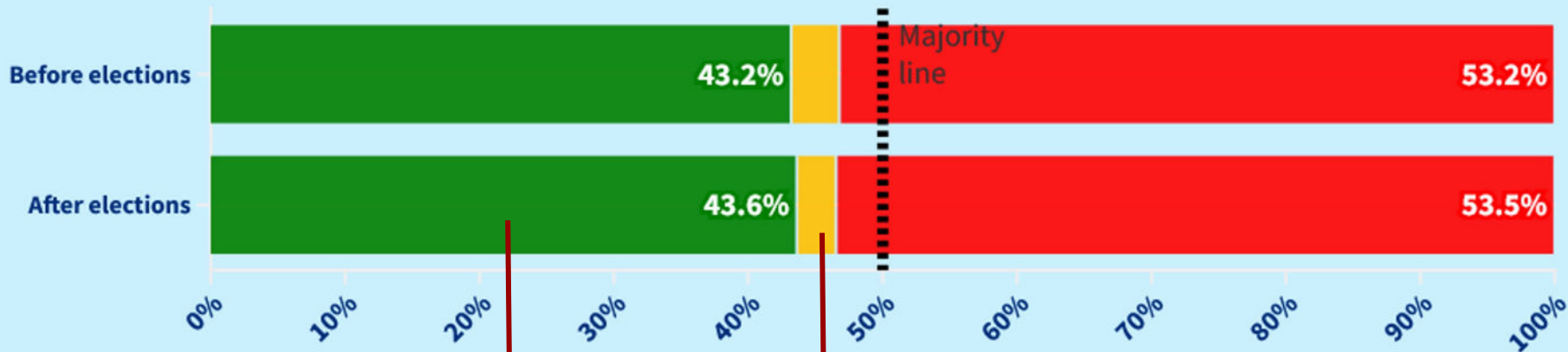
■ For ■ Abstain ■ Against



# Establish a minimum threshold of European materials, devices or services for EU public procurement



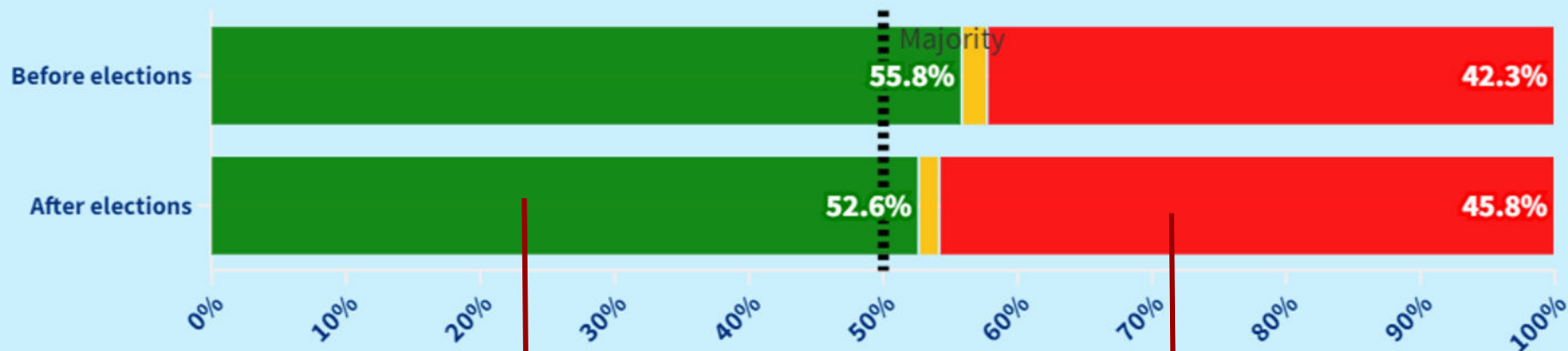
■ For ■ Abstain ■ Against



# Calls for suspending the Privacy Shield until the US authorities comply with GDPR and the EU Charter



■ For ■ Abstain ■ Against

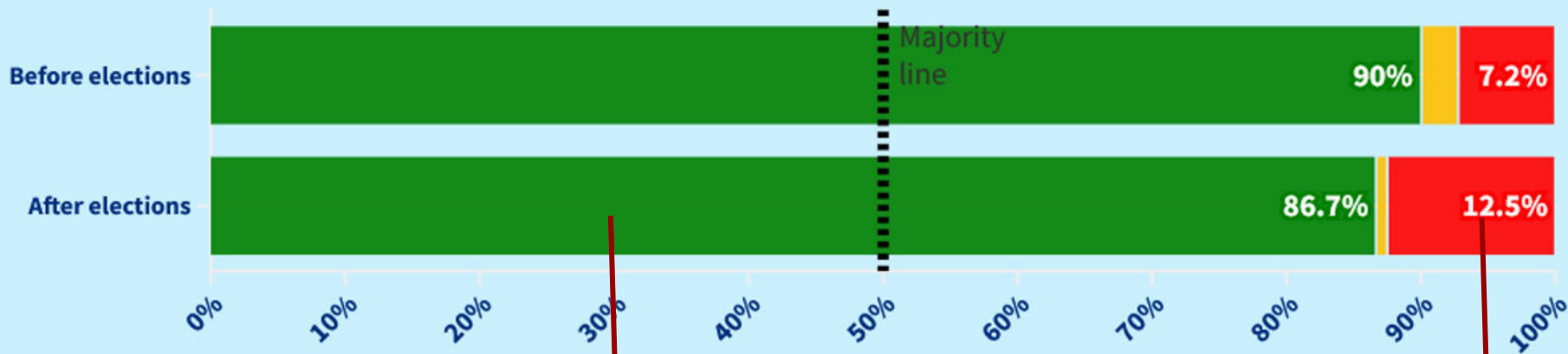




# Supports the European Council's decision to grant EU candidate status to Ukraine



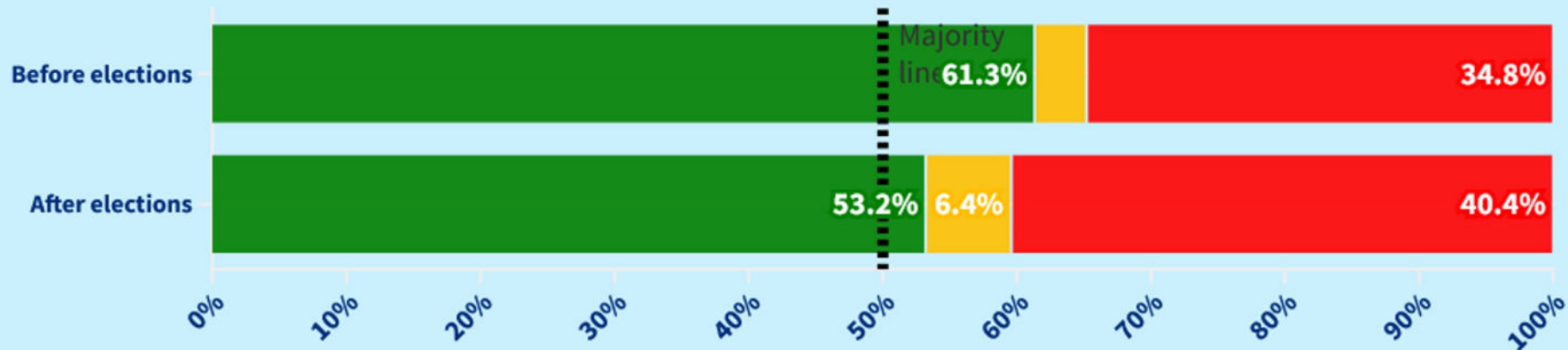
■ For ■ Abstain ■ Against



# Decisions on sanctions, interim steps during enlargement and other foreign policy matters must be taken by QMV



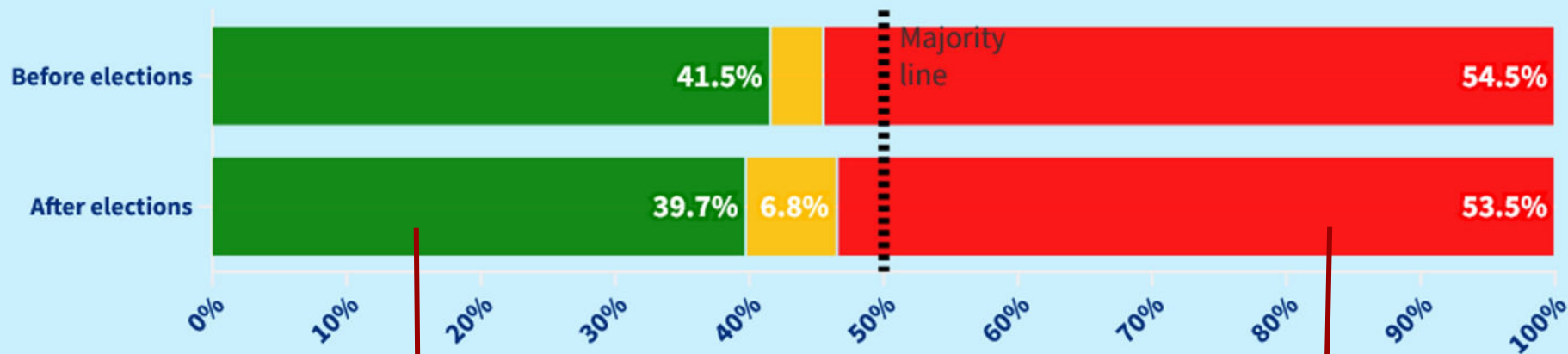
For Abstain Against



# EU & Japan must prioritise diplomatic stability when dealing with China, and resolve disputes through peaceful means



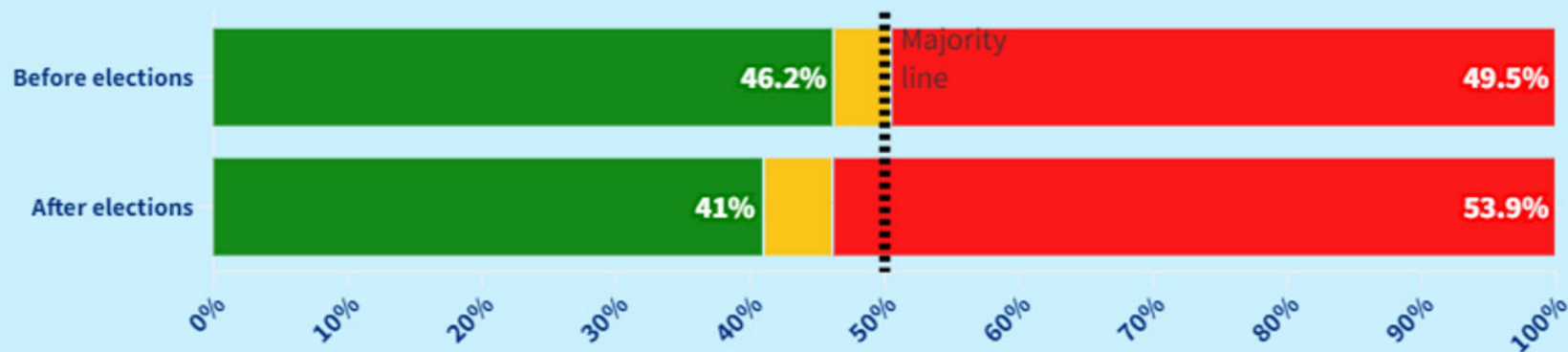
■ For ■ Abstain ■ Against



## Review Israel's compliance with its obligations under the EU-Israel Association Agreement



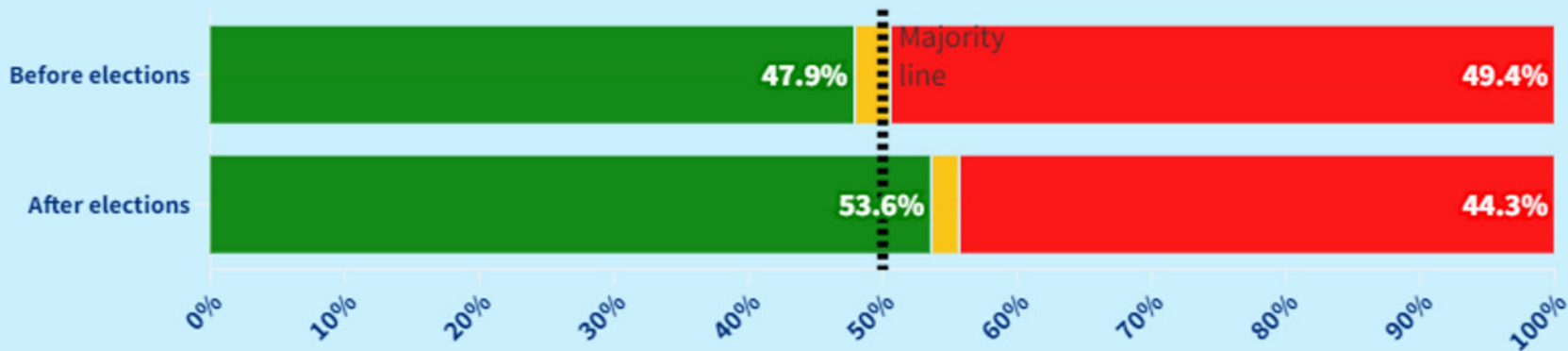
■ For ■ Abstain ■ Against



## Rejects calls for an IMMEDIATE ceasefire in Gaza



■ For ■ Abstain ■ Against



# How to engage with the new decision- makers

# Likely long-term institutional trends:

## EU vs national governments


- Weak national governments + stability of EU institutions => opportunity for the Commission, EP, Council to increase their role
- BUT, Commission operates with small budget, hence expect push for own taxes, joint borrowing.

# Commission vs EP

Fragmentation of power in the EP + most MEPs coming from opposition parties =>

- harder job for the Commission to build majorities, i.e. harder to turn the EP into a rubber stamping institution
- individual MEPs more needed to be lobbied / they will increase their power when legislation is required





Detailed forecasts,  
list of new MEPs (+background),  
legislative monitoring:

[www.eumatrix.eu](http://www.eumatrix.eu)

[doru.frantescu@eumatrix.eu](mailto:doru.frantescu@eumatrix.eu)

