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POPULISM REPORT

Q2 2018



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Tamás BOROS
Gábor GYÓRI

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FEPS – Foundation for European Progressive Studies

Rue Montoyer 40, 4th floor – 1000 Brussels, Belgium

T: +32 2 234 69 00

Email: info@feps-europe.eu

Website: <http://www.feps-europe.eu/en/>

Twitter @FEPS_Europe



Policy Solutions

Revay utca, 10 – 1065 Budapest, Hungary

Email: info@policysolutions.eu

Website: www.policysolutions.eu

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Responsible editors:

Ernst STETTER, FEPS Secretary General

Tamás BOROS, Co-Director of Policy Solutions

Maria FREITAS, FEPS Policy Advisor

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THE POPULIST TIDE LIFTS THE WESTERN FAR-RIGHT BOATS

If the first quarter of 2018 only offered a slight indication that this would be a much better year for populists than 2017, then the second quarter appears to be a strong confirmation that this is indeed a trend. There is no populist tsunami, but at least for the time being, there is a creeping tide. Assuming that this is an ebb and flow process, we are clearly in the latter phase after the ebb of 2017. While the recent polls show that at the European level overall the changes are still relatively slow, in some countries – and in particular in those that had recent elections – the impact of the trend is rather pronounced.

The most significant populist victory thus far, the Italian election of March 2018, was followed by the massive re-election victory of Europe's arguably most prominent populist, the Hungarian prime minister Viktor Orbán. Orbán's re-election – though clearly less important for the European Union (EU) in general and the euro specifically than the populist takeover in Italy – was symbolically vital. Not only because of Orbán's extremely controversial standing in Europe and his increasingly hostile attitude towards liberal democracy, the European institutions and the European project overall, but also because it remains thus far one of the few examples when a populist succeeds in terms of the popularity of his policies and therefore endures in office.

The Hungarian rabble-rouser has defied the gravitational pull that holding office appears to exert on the popularity of most politicians these days, and he has done so despite widespread expectations – within Hungary and across Europe – one would expect that his policies would be likely to doom him but instead, he has emerged

as the embodiment of the idea that populism can be built into something resembling an enduring national program that could come close to the post-War social/Christian democratic consensus of the second half of the 20th century. Even though his populist programme clearly lacks the cross-national ideological coherency of the social-political model of European liberal democracy combined with social market economy, but at this pivotal point in history Orbán's governmental programme has some qualities that could turn it into a working framework for structuring Hungarian politics: the successful identification of issues, symbols, sentiments and needs that large segments of the public yearn for; whilst combining it with a pragmatism that allows for considerable flexibility as long as basic governmental objectives remain unchallenged.

Can this particular mode, including its electoral success, endure and spread further across Europe? We are still far from a definite answer to this question, but Orbán's success is certainly an important indication that with a parallel weakening of democratic oversight and electoral competition, the model can work; whether this is temporary and/or isolated remains to be seen.

One obvious development in 2018 is that Orbán is gaining allies in Europe who are erecting a protective umbrella against pressure by international institutions and countries that want to assert the basic values of liberal constitutionalism across the EU (and ideally beyond). In this respect, the Slovenian election, which immediately followed the Hungarian election, may be another key notch in Orbán's belt after Italy and Austria. On the one hand, the election resulted in a surge of populists on both fringes (we will return to a more detailed review of individual countries below).

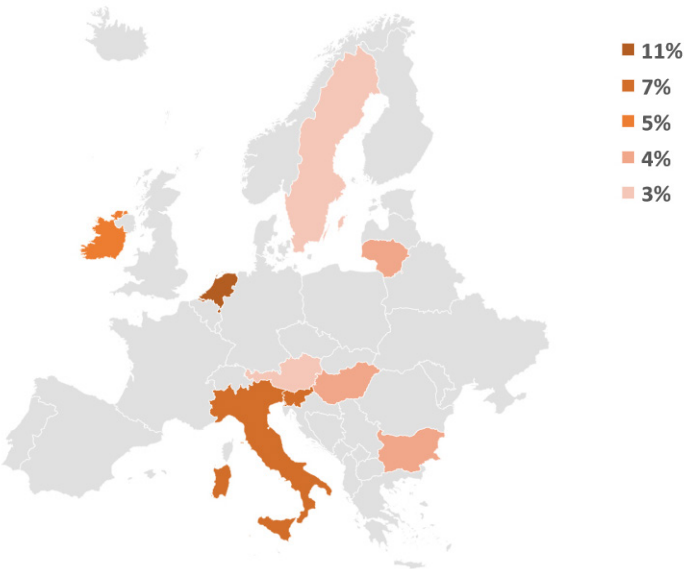
More importantly, however, it featured a further shift in a direction that we hinted at in our previous analysis in the context of the

Austrian election: many mainstream parties, too, are moving in a populist direction, and as a result they either embrace similar methods as the openly illiberal governing parties in Hungary and Poland, or at least provide a cover for the latter. Since it resulted in a hung parliament and a protracted (and potentially fruitless) process of government formation, it is difficult to assess full the impact of Slovenian election with any certainty. What is apparent nevertheless is that the victory of Janez Jansa's Slovenian Democratic Party – whom Orbán publicly endorsed – could strengthen the Hungarian model further by bringing on board a potential regional ally or maybe a follower (though the latter is less likely in light of the lacking parliamentary majority to support a major transformation). Given that based on most indicators, Slovenia is by far the most advanced and “westernised” country in the region, a turn towards populism there is an important victory for Orbán's model.

Moreover, while it is not directly an EU issue, given its vital importance for Europe, we should at least briefly allude to the impact of the Turkish election as well: like Orbán's victory, Erdogan's sweeping electoral success in June serves to cement one of Europe's quintessential illiberal regimes, which is a trendsetter in its own right. Even though Turkey is not a member of the European Union (and may indeed have forfeited the chance of membership for a generation or more when Erdogan decided to consolidate his authoritarian presidential regime in the referendum and the subsequent presidential election). It should be noted that Turkey has vast influence on European affairs, in a variety of capacities. Most importantly, it has emerged as one of the key “safety valves” controlling the flow of Syrian civil war refugee into Europe, and it has recurred to this strategic position to essentially act as on/off switch to exacerbate the crisis at will,

thereby fuelling populism on the continent further. But Turkey is also vital as a NATO ally, as a player in the Syrian crisis, and the home country of Germany's largest minority, many of whom appear to be supportive of Erdogan's policies. The Turkish public's embrace of populism is not only part of the European populist crisis: it is also likely to stimulate it.

Countries where populist parties significantly increased their support in Q2 2018



Map 1

Even though none of the elections in EU Member States in the second quarter of 2018 brought any major changes (in stark contrast to the potentially monumental Italian election in the first quarter), their aggregated impact provides a boost for populism. The overview of all the countries surveyed suggests three broad trends, only one of which is positive.

Let's start with the good news. In the vast majority of EU countries, the changes in the polling figures were rather small. Remarkably, there were only three countries (Italy, the Netherlands and Slovenia) in the entire 28-nation EU where the net growth in the polling figures of populists over the last three months exceeded 5%.¹

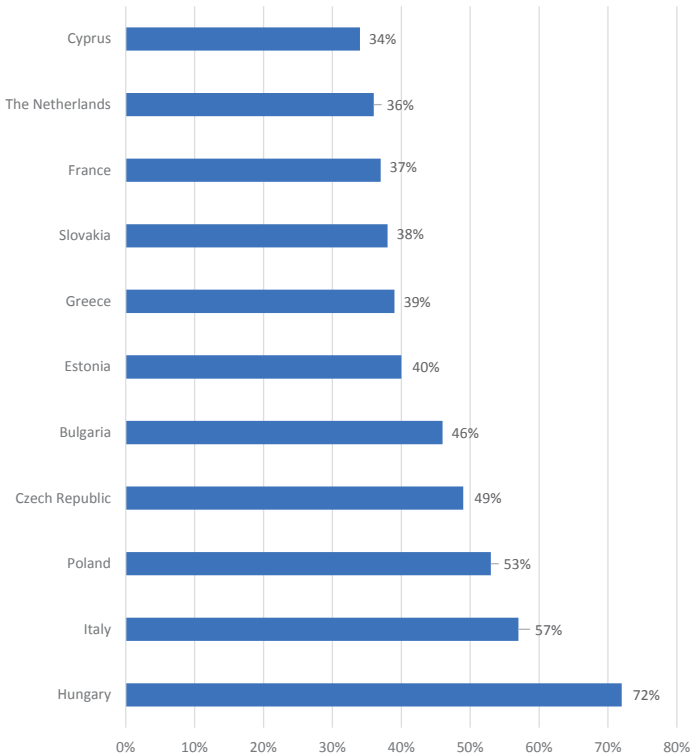
A further detailed look shows that in 13 out of the 28 EU Member States the net growth ranged between 0%-3%, considering the standard sampling error in polling² (we will come back to this later, but sometimes minor net growth nevertheless included significant and relevant shifts between populist parties). On a more positive note, in eight countries (the Czech Republic, Estonia, Finland, France, Latvia, Luxembourg and Spain) there was a net decline in the strength of populists, though it was mostly marginal and never exceeded three percent. Finally, there were only four countries (Bulgaria, Hungary, Ireland and Lithuania) where the net growth of populists ranged between 3%-5%, reflecting a significant but not massive increase in the support of populists (and in one of these – Hungary – we also see a post-election increase).

1 Source of all data used in this analysis is Progressive Post's Populism Tracker: progressivepost.eu/spotlights/populism/graph/

2 See this article to have a good overview about sampling error in polls: <http://www.pewresearch.org/fact-tank/2016/09/08/understanding-the-margin-of-error-in-election-polls/>

Countries where more than one third of the likely voters supports populist parties

(% of the total likely voters, Q2 2018)



Graph 1

Now for the bad news. The second clearly identifiable trend is a shift towards the right, with most of the net gains in populism manifesting themselves among rightwing nationalist populist parties, while the net losses tended to affect leftwing parties. Significant net gains were made by rightwing populist parties in Austria (+3 percentage points), Bulgaria (+5), France (+3), Germany (+5), Italy (+11), Hungary (+4), the Netherlands (+8), Slovenia (+4), Sweden (+3), while in several other countries they experienced smaller gains. In the meanwhile, leftwing populists lost some ground in France, Greece (though in Greece the gains of the governing Syriza's loss accrued to the communists, but the far-right Golden Dawn also increased its support), Germany, Italy and Spain.

To be sure, as always there were exceptions to this broad trend: rightwing populists lost ground in the Czech Republic, where populist-in-chief Andrzej Babis' coalition-formation struggles have costs his ANO party 5 points in the polls, the Lithuanian Order and Justice party dropped by 3 and the Latvian LNNK was 4 points below its Q1 result (Q1 2018: 13% vs. Q2 2018: 9%). In the meanwhile, the exceptions to the trend of leftwing decline were (in addition to the abovementioned mixed case of Greece) Slovenia (where the far left picked up 3 points – with a parallel surge in the support of the far-right) and Ireland (where Sinn Féin – a party that is to some extent difficult to situate on the left-right continuum – has gained 5 points). In Lithuania, in the meanwhile, the centre-left, ALDE-affiliated populist Labour Party – which is also difficult to classify in the traditional left/right framework – surged by 7 points.

The figures mentioned above show a significant increase in the support of rightwing populists, and here is an additional vital

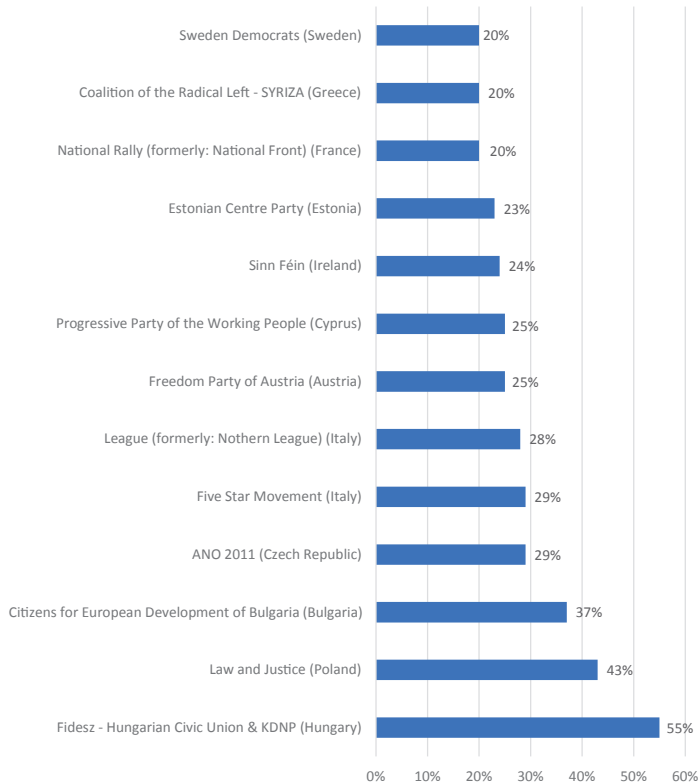
information for interpreting the data: The four countries with some of the wildest swings towards the right (Italy (+11), the Netherlands (+8), Germany (+5), France (+3)), include three of the four largest EU member states and, with 227 million citizens among them, almost half of the total EU population. What these seemingly innocuous numbers mean in practice is that there are many millions of people in the EU who recently shifted their support to far-right populist parties in the last three months.

The third and final trend is the regional distribution of these figures, which differs substantially from the first quarter. In the first quarter, most of the gains by populists were in the Mediterranean region and in central and eastern Europe. It seemed that in terms of the current trends (and of course in other respects too), the EU was divided between a western/northern Europe where populism was stagnant, and an eastern and southern Europe, where it was on the rise.

In the second quarter, the previously stagnant western and northern European rightwing populism is massively on the rise, while the picture in the other two regions is more mixed. It is fair to say that on the whole outside of those countries that recently held elections (Italy, Hungary and Slovenia), which always ends up impacting the public mood, populism has been generally more stagnant in the eastern and southern European countries when compared to western and northern Europe. Most of the parties that gained substantially in the polls since the last quarter – e.g. the AfD in Germany, the FPÖ in Austria, FN in France, the PVV and the FvD in the Netherlands, the Sweden Democrats – had been either stagnating or falling in the last quarter.

The most popular populist parties in the EU

(Q2 2018, support among likely voters, %)



Graph 2

While we can only speculate as to the reasons behind the recent trend of surging western European far-right populism, it appears plausible to assume that much of it is driven by the increase in refugee-related news coverage, with the perceived or real pressure of a growing number of refugees trying to enter Europe through the Mediterranean. Some local developments may play a role, too: in Germany, the Turkish election had a local dimension as well because of the large Turkish minority, and the controversy surrounding the joint photo of two ethnically Turkish members of the German national football team with the Turkish president Erdogan drew the attention of the German public to the problem of the integration of local Turkish minority. Ironically, the political force that likely benefitted most from this controversy, AfD, is also the one that is generally most sympathetic to authoritarian regimes such as Erdogan's.

In any case, despite recent trends the overall differences remain relevant: There is still only one country in western Europe, Austria, in which populists are part of the government, while in southern Europe two governments are controlled by populists (Italy and Greece), and in central and eastern Europe they control several governments (Hungary, Poland, Czech Republic, etc.) and are influential elsewhere, too (e.g. Slovakia). Moreover, most of eastern European mainstream politics is suffused with populism, which is why on a variety of issues, from refugees all the way to George Soros, eastern European governments are increasingly aligned, regardless of whether they technically qualify as populist or not.

Let us take a look now at the various regions, with a focus on the countries where substantial shifts have occurred.

Central and Eastern Europe

The big event in the region – and in fact in Europe overall – was undeniably the re-election of Viktor Orbán and his Fidesz party in **Hungary**, which were returned to power with a two-thirds majority in parliament after a manifestly unfair election in which the opportunities of the opposition and of independent media to reach the public were severely restricted by a variety of manipulative means. Nevertheless, the public's endorsement of Viktor Orbán's policies (ultimately **Fidesz** received fewer votes than the disunited opposition, but it was far ahead of all other parties and the electoral system heavily favours larger parties) appear to have led to a resignation in European mainstream circles to the inevitability of Fidesz remaining in power, despite its rather dubious relationship to the democratic principles that are presumably the cornerstones of the European project.

In the immediate aftermath of the election, Fidesz received a massive post-election gain in the polls, rising by 7 points, while its main competitor, the formerly far-right but now mostly centrist **Jobbik** party – the other populist party in the Hungarian arena – dropped by 4 points as the party split heavily over its centrist course which in the end led to a massive defeat. Overall, there is no major change in the net strength of populism – at 72% overall, Hungary is still the country with the largest share of populist voters by far – but the populist Fidesz's third successive election victory gives these polling results a different, more significant context.

Moreover, Orbán has used the opportunity to declare war on the European institutions and to cast himself as the leader of a conservative, “Christian democratic” challenge to the European mainstream, which he argues wants to flood the EU with migrants to undermine the nation-states that Orbán wishes to buttress against these attacks. He used his recently reinforced star power to insert

himself into the election campaign in **Slovenia**, where he campaigned for the centre-right party **SDS** and its leader, Janez Jansa, who won the election far ahead of the second-place runner (24.9% for SDS vs. 12.7% for the List of Marjan Šarec, LMS). Along with the increasingly populist centre-right bloc and the splintered centre-left, the far right also made it into parliament, edging slightly above the 4% threshold (in the first quarter it was barely discernible in the polls), while at 9% the far-left **Levica** party also improved by three points over its last quarterly polling result. The country appears deeply divided and it will be difficult to assemble a working governing majority. This results in a situation that is potentially ripe for further exploitation by extremists.

In **Bulgaria**, the governing **GERB** party – another rightwing party whose general political positioning is similar to Orbán’s – led by Prime Minister Boyko Borissov has improved its standing in the polls by a significant five points raise, thus reinforcing its position as the leading party after it saw its lead narrow in the last quarter (Q1 2018: 32% vs. Q2 2018: 37% among likely voters). In addition to GERB, the far-right **United Patriots** also saw their numbers improve, though less substantially than the governing party. Along with Hungary, Italy, the Czech Republic and Poland, Bulgaria ranks among the countries with the highest levels of populism in the EU.

As we noted previously, **Latvia** and **Lithuania** were two of the few countries that defied the broader trend of surge of far-right populism, with the rightwing populist parties losing ground (-4% for the **LNNK** in Latvia and -3% for **Order and Justice** in Lithuania), which was accompanied by a massive rise in the support of the leftwing **Labour Party** in Lithuania (Q1 2018: 3% vs. Q2 2018: 10% among likely voters). The reasons for the surge are not entirely clear, but the rapid trajectory coincides with the return as the Labour Party leader of the founder, MEP Viktor Uspaskich.

In the **Czech Republic**, the billionaire/prime minister Andrej Babiš is not faring as successfully in the polls as initially predicted. The protracted coalition negotiations, and the resulting surreal coalition – an alliance of the rightwing **ANO** and the centre-left Social Democrats, tolerated by the **Communists** – appear to have taken their toll, leading to one of the steepest declines for populist parties this quarter, with ANO dropping from 34% to 29%. This still leaves ANO as the strongest party, but the electoral honeymoon that commenced in October last year is now officially over.

The shifts in the remaining countries of the region (Croatia, Estonia, Poland, Slovakia, Romania) were not significant.

Southern Europe and the Mediterranean

Dominated by the refugee issue, post-election **Italy** saw the single biggest shift in the support of a populist party in the last quarter: the far-right **League** has improved 11 points over its 17% election result in March and now barely lags behind the leading Italian party, the populist 5 Star Movement. The latter is impossible to frame ideologically but is generally less extreme in its policies and principles – but more resolute in its anti-establishment outlook – than the League. The desperate efforts by the establishment to block the new government from taking power, including an attempt by President Sergio Mattarella to install a technocratic caretaker government – have not served to endear the traditional political elites to the voters or to undermine the support of the populists. Although the **5 Star Movement** did experience a 4-point drop in the polls, the League's 11-point surge more than made up for this.

The two populist parties disagree on a number of issues, where the 5 Star Movement tends to veer to the left while the League hews to the right, but on the cardinal issue on Italy right now, migration, they are largely in agreement on halting the influx of refugees. The hard line taken by Matteo Salvini, the new interior minister, towards refugees is obviously one of the key causes behind the boom in the support of his far-right outfit, the League.

In **Greece**, disenchantment with the populist **Syriza** government is growing, and the party fell to a low of 20% in the polls. At the same time, Syriza's net loss of 3 points over the last quarter was equivalent to the 3% surge in the support of the Communists, so it appears that this might be an instance of intra-left redistribution of populist support. At the same time, however, the extremist Golden Dawn party also picked up two points, in line with the general European trend of rising support for the far-right.

Support for the **Progressive Party of the Working People** in **Cyprus**, and for the populist parties in Spain and **Portugal**, remains virtually unchanged. Although there was a lot of political turmoil in **Spain**, leading to the resignation of the long-serving prime minister Mariano Rajoy and the installation of the socialist Pedro Sánchez as prime minister, **Podemos** did not appear to be able to capitalise on the crisis of the political establishment and its numbers are still stuck around the 16-17% level observed in the last quarter. There is still no relevant populist party in **Malta**.

Western Europe and the British Isles

As we noted in our overview above, there was a massive shift in western Europe over the last quarter, but ultimately the general

trend is more interesting than the events in individual countries. With the striking exception of the Netherlands, the changes in individual countries were obvious but not spectacular. In **Germany**, **AfD** continues its steady rise and now stands at 16% in the polls, nearly on par with the Social Democrats, which not that long ago was a mass party with over 35% in support. Though not substantially, but the leftwing populist **Die Linke** has also lost some support.

Clearly, the conflicts between the two centre-right sister parties within the German coalition over the migration issue serve both to highlight the alleged ineptitude of the traditional political elite and to push the AfD's most vital issue into the limelight. With the rising news coverage of growing refugee figures at the European periphery, the AfD could not have dreamed up a better agenda-setting than the conflict between CSU chairman and interior minister Horst Seehofer and chancellor and CDU chairwoman Angela Merkel, who squabbled over controlling the inflow of refugees. The SPD wisely thought it better stay out of the fray – a very vocal endorsement of Merkel would have hurt the chancellor in her own party, where she is controversial even without the support of the Social Democrats – but this meant that the party that was best positioned to benefit from Seehofer's high-stakes blackmail of Merkel was AfD.

In the end, the only thing that's keeping the uncomfortable coalition together is the fear of a potential defeat they would face if a snap election were held - where AfD will likely rise further and leave the mainstream parties with very limited and complicated coalition possibilities. Seehofer's game may yield dividends if his party CSU wins the Bavarian state election in the fall as the anti-immigration party with the power to actually implement anti-refugee policies, but it's a risky strategy. If the CSU loses massive support in Bavaria, then it might well conclude that its involvement in the national/federal coalition undermines the core of its existence and therefore the

loyalty of Bavarian voters. Incidentally, the loss of large segments of core supporters was a development that the centre-left SPD has never been able to connect to its involvement in the coalition government, where it plays the role of the left-leaning junior assistant in Angela Merkel's emphatically centrist government.

A similar, though less pronounced dynamic has played out in **France**, where Marine Le Pen's **National Rally** (which is the new name of her party, the National Front) slightly improved her standing in the polls, while her leftwing populist competitor Jean-Luc Mélenchon's **France Untamed** dropped slightly. Neither development is dramatic, and it may well be a temporary blip, but it nevertheless meshes neatly with the general western/northern European trend of rising support for the far-right and declining support for the far left. As Emmanuel Macron's popularity is also dropping and his reform policies begin to alienate certain core constituencies, the realignment of voters in a system in which the traditional parties have fallen substantially behind a mix of centrist challengers and resurgent populists renders the future especially unpredictable. Importantly, while the centre-left stands well below 10%, the still powerful French centre-right has no leading candidate yet to challenge President Macron, and as a result its support in the polls is still likely understated as compared to its presumed voter reserves.

The declining left is also true of **Luxembourg**, where the brief surge in the support for the **Left** has disappeared and the party is back at its standard 5% level of support.

The most significant change outside Italy happened in **the Netherlands**, with the difference that the populist surge was not concentrated in one party (as was the case with the League in Italy), but dispersed among three, including the far-left **Socialist Party** (+2 points). The biggest beneficiary (+6 points, from 10% to

16%), however, was the “traditional” far-right **Party for Freedom** (PVV) led by Geert Wilders, which appears to be recovering after its disappointing electoral performance and its anaemic polling since then. While the latter is nowhere near in a position to challenge the main governing party VVD and the popular prime minister Mark Rutte, the PVV is now again the strongest opposition party, despite the fact that it must share the support of the far-right segment of the electorate with the **Forum for Democracy**, which also rose three points, from 6% to 9%. This makes the Netherlands the “hottest” terrain for far-right resurgence in the last quarter, though one must also add that due to the extremely proportional nature of the electoral system, extremist parties have a much steeper climb and a much more difficult path to power than in some other European countries. Still, with over a quarter of Dutch voters opting for rightwing extremists, the situation is disquieting.

In **the UK**, the pro-Brexit **UKIP** has added one point to its 2% polling result last quarter, but it remains marginalised in terms of public support. However, if Brexit becomes uncertain or is fraught with too many compromises for the Brexit extremists, then the fringes of the Tory party may well realign with UKIP; Nigel Farage and others appear to be waiting in the wings for such an opportunity. Meanwhile, Corbyn’s Labour Party and the Conservatives are neck and neck in the polls, which means that a split in the Theresa May’s party could result in the strengthening of Corbyn’s position.

In **Ireland**, **Sinn Féin** has increased its support substantially, rising from 21% to 26%, and is now competing with the once dominant Fianna Fail for the position of the leading opposition party. The minority government party also remains broadly popular, however.

There was no relevant change in **Belgium** in the last quarter.

Northern Europe

Northern Europe is once again the most stable region with the lowest levels of change in terms of populist support. In **Finland** and **Denmark** the support of populists has essentially stagnated, but in **Sweden** the far-right **Sweden Democrats** have added 3 points, and they are inching closer to the leading government party, the Social Democrats. If this trend persists, then they may end up winning the September 2018 parliamentary election, though they would still need coalition partners to govern, which might prove a tall order. As a sign of shifting times, however, the Social Democrats in neighbouring Denmark have moved decisively to the right on immigration, and in the process they have terminated their traditional cooperation with other leftwing parties because they no longer see eye-to-eye on this issue.

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Populism Reports

The past few years have seen a surge in the public support of populist, euroskeptical and radical parties throughout almost the entire European Union. In several member states, their popularity matches or even exceeds the level of public support of the centre-left. Even though the centre-left parties, think tanks and researchers are aware of this challenge, there is still more that could be done in this field. There is occasional research on individual populist parties in some member states, but there is no regular overview – updated on a quarterly basis – how the popularity of populist parties changes in the EU Member States, where new parties appear and old ones disappear.

That is the reason why FEPS and Policy Solutions have launched this series of reports, entitled 'Populism Report'.

- This report is edited by FEPS and Policy Solutions with the financial support of the European Parliament