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THE CURRENT: How will France's changing political dynamics shape Macron's next term?

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PITA: You're listening to The Current, part of the Brookings Podcast Network. I'm your host, Adrianna Pita.

Emmanuel Macron was re-elected president of France with 59 percent of the vote, staving off a repeat challenge from far-right anti-immigration populist Marine Le Pen. Although his victory was ultimately decisive, Le Pen's share of the vote marked the far-right's best result in a French national election, unsettling a Europe shaken in recent years by the rise of far-right populism and currently confronting Russia's war in Ukraine.

With us today to talk about the results of France's election and what it means for Macron's second term is Célia Berlin, visiting fellow, and Agneska Bloch, senior research assistant with our Center on the US and Europe here at Brookings. Célia and Agneska, thanks for talking to us today.

BELIN: Thank you for having us, Adrianna.

PITA: Right, so I think, Célia, I'd like to start with you. In the run up to this election, you wrote a piece in Foreign Affairs that said, "France's election shouldn't have been this close." Polling was really uncomfortably close between Macron and Le Pen right up until the final days of the election. So what happened in those final weeks and days that finally widened the gap into the result we got? Was it about Macron finally starting to campaign, or were there just enough French citizens willing to come out to vote against Le Pen's far-right agenda?

BELIN: Thank you, Adrianna. As you know, the French election operates in two rounds. So we had the first round, and then two weeks later, the runoff, the second round. And the polls were even closer all the way up to the first round. And as long as people had not started voting, we based our assumptions on polling, but there's also this question on, are we really facing an earthquake here? And I believe one of the elements, and the reason I wrote the piece, is that, yes, this shouldn't have been so close because Marine Le Pen has changed and improved over time as a politician, but her platform remains extremely radical. Emmanuel Macron has, for the past five years, established a record as a good crisis manager. And he has faced many crises: the COVID crisis, the war in Ukraine, but also the yellow vest protest. And, overall, we might have, maybe two months ago, expected Emmanuel Macron to sail through his reelection.

But what has happened is that in many ways the war in Ukraine has overshadowed French politics for more than two months, right up to the first round. And in that time, Emmanuel Macron failed to campaign; he has only announced his candidacy through a simple letter to the French; he had held only one rally; and I don't think he has done a good job at putting forward a vision for his next five years in office. So what you've seen all the way to the first round, and then slightly going towards the second round, is really alternative parties picking up, in particular the nationalists with Marine Le Pen, but also the far left with Jean-Luc Mélenchon who gathered some steam all the way to the first round.

And this is because a lot of French people suddenly woke up and realized, do I know Emmanuel Macron? I know he got me through these crises, but do I really know him? And the point I make in the piece is twofold. One, Emmanuel Macron has been elected on a platform, a centrist platform or pragmatic platform, that he hopes to overcome the left-right divide. And so five years into this, the French are still very confused on where he stands. Is he of the right, is he of the left? What is actually this political

animal? And this has slightly increased this mistrust of him and confusion. And on the other side, you have Marine Le Pen, who has really outperformed a normalization campaign. Really tried to pass herself not as far right politician, but as a normal, almost mainstream candidate. And so this confusion has I think persisted all the way to the runoff with polls that were quite close until the last few days.

PITA: Agneska, did you want to add anything there?

BLOCH: I would just add that what we saw was a republican front coming out to make sure that Marine Le Pen didn't make it into the highest office in France. We saw across the board people who had voted for the left and the right in the first round show up and vote for Macron begrudgingly. And as Célia noted, there really is a lot of anti-Macron sentiment in France, people who are confused about who he is, but also people who are opposed to a lot of things that he has done. So, I think the surprise for some, though it happened gradually over the past couple of weeks, was seeing slowly, the numbers creep up as people kind of accepted that they would vote against the far right, even if it meant voting for Macron.

PITA: So the nationalist's share, Le Pen's share of the vote, in her speech on election night, she claimed that 41% as a victory in its own right, although it was ultimately not enough to win the election. What does that significant share of the French electorate, what does that say about where French politics and society are right now? Agneska, do you want to start?

BLOCH: Sure, thanks, Adrianna. I think Marine Le Pen's result shows that we really are continuing this trend that started with Emmanuel Macron that Célia just described, of the dividing cleavage in French politics no longer being between left and right. Today, the cleavage really is more between those who are advocating for a more open society – Macron, as we know, is very pro-Europe, pro-globalization – and those who are more in favor of a closed society.

Emmanuel Macron, of course, ran on exactly this kind of platform five years ago, trying to overcome the left-right divide, trying to present a third way, a new way, that people have called the radical center, the extreme center. Today, of course, it's hard to place him on the political spectrum.

Marine Le Pen really took a page from this 2017 Macron playbook in the runoff to this election. Célia already alluded to the fact that she's undergone this kind of rebranding to try to purge the most extremist and radical aspects of her platform from her public persona and really focus on the more populist elements that she knows will be able to play to people across the political spectrum. It's important to note this rebrand is really just a façade. If you look at her program and if you ask her about the issues that she's trying to speak less about, her platform hasn't changed, her ideas are still the same. They're very anti-immigrant, anti-Islam and racist. And so the change that she's made is really only surface level.

But what we're seeing is that while voters who had voted for the left in the first round for Jean-Luc Mélenchon, who got roughly 22% of the vote, while many of them, about 40%, a little over, did come out for Macron in the second round, 17% of them actually voted for Marine Le Pen. And this is after Mélenchon had told his voters after the first round, "we must not give a single vote to Marine Le Pen of the far right."

So, yeah, we're seeing that these populist arguments that she is making, even as a far-right candidate, are playing across the political spectrum, and that less and less the divide is between left and right in France.

Belin: If I may add, I would look at what is that the core of Marine Le Pen's electorate, which again was far from being a majority of the French -- quite the contrary -- but still has increased over time. So Marine Le Pen has little by little crept up in French politics and gathered more and more share of the vote. You have two kinds: you have the sort of anti-establishment populists -- the anti-system populists, sometimes -- and she has played along this line extremely strongly. These were invigorated, in particular, during the COVID crisis and after the COVID crisis, rebelling against lockdowns, rebelling against the digital health path, having a feeling that the centralized decisions of Paris on their everyday

life, where they could go, and whether they should get vaccinated, was really an infringement of their freedom, and more than anything, was potentially preventing them from working and getting a better life. So this is a strong motivation behind the Le Pen vote.

But you also have a second major group, which are the nationalists and even the ultra-nationalist, borderline racists, which have been highly activated by Éric Zemmour. Éric Zemmour was the far-right insurgent candidate that appeared last summer. He's a TV polemicist that really plays with a lot of racist tropes, and has really launched, we can call it a racist campaign. He has gathered in the first round only 7% of the vote but has really activated this base for Marine Le Pen. And so in the second round, she could count also on these people that are squarely obsessed on immigration, but also Islam and secularism and a sort of fear of a country that would be changing culturally, societally, in a way that they would perceive as detrimental to them. So at the core of her vote are these two elements and they're going to be around, and Emmanuel Macron in his second term will have to deal with them as well.

PITA: Agneska, can I ask you what the shape of this election, from the narrow win to the number of the left who were willing to come out to defeat Le Pen, the high abstention rate, how are all of these factors going to affect how Macron approaches governance and his policies, in particular, for that next term going forward?

BLOCH: I think Emmanuel Macron is likely to have a very rocky second term. Already in his first term we saw those gilets jaunes, the yellow vests, protest. That was extremely based in anti-Muslim sentiment, especially as it grew, and I think it's very possible that we would see more of that. Of course it's impossible to predict what will happen over the next five years, but I think we could see a lot more of that, especially as the French are feeling domestically the impacts of the war in Ukraine with rising gas prices, rising inflation, etc.

I think you noted the high abstention and the high numbers of left voters who, while some did vote for Macron, many, many abstained. 40%, a little over 40% of Mélenchon's voters, so the far-left candidate in the first round, abstained from the second round this year. Young people also abstained in large numbers. Over 40% of young people in both rounds abstained – and when I say young people, I'm talking about people roughly under 35. So there are large factions of the French electorate who feel completely disillusioned with politics today, feel disillusioned with Macron, if not disgusted and abandoned by many of the policies that he's pursued. And I think the kinds of sentiments that we were seeing in his first mandate that he's Jupiterian, that he's disconnected from the people, that he really only has a base in Paris and in elite urban areas. I think a lot of that he continues to struggle with and will continue to struggle with in the second term.

PITA: Célia, can I ask you to talk specifically to Ukraine. That's obviously been, as you said, it's overshadowing the last several months of France's politics. Will it affect it all the way that Macron approaches Ukraine and the broader pro-EU, pro-NATO approach that he's taken?

BELIN: So, probably contrary to the domestic dynamics that Agneska has described, on foreign policy, Emmanuel Macron is likely to be able to continue implementing the diplomacy that he has enjoyed performing. In particular, we have seen over the past five years, Macron having a very hyperactive, ambitious foreign policy. Very impatient, but also pragmatist, because he has both been a multilateralist but at the same time he has also tried to seduce some of the most nationalist figures of the global scene, including President Donald Trump of his time. So Emmanuel Macron in a second round, from the function of presidents, will continue to for sure to behave that way.

Also because, if anything, we said earlier that Emmanuel Macron did not really have a vision for a second term. The only one vision that he keeps putting forward for people to adhere to is his pro-European sentiment, the idea that you need to build up Europe's independence, Europe's power; in an increasingly competitive world that is the only actually solution for protecting the French people is having strong immigration policies, but at the European level, strong energy policies and energy resiliency, but at the European level. And he's very likely to continue to play that role.

Two last points: he has promised to have climate action as a priority. This is a function also of his politics that, between the first round, and the second round, he really needed to attract the young people's vote and the left and center-left and far-left vote. And he did so by really insisting that one of their priorities, the environment and climate action, would be one of his top priorities. So he's clearly going to use Europe as a stepping stone to do that, and you might expect him to push it either within the French presidency of the EU, which is still going until the end of June, or in any other formats that he can use at the European level.

And second, on the war in Ukraine, you can expect continuity. Macron will protect the unity on sanctions. It's hard to see at this point whether you will have new waves of sanctions; we are at a specific moment of the war that is starting again very forcefully from the east, but the stabilization from the west of Ukraine. So we are entering new territories there, but one element is Macron will continue to work on the unity of the trans-Atlantic camp and if he can participate with his own diplomatic initiatives he will, but I would expect this unity to remain.

PITA: Lastly, I'd like to look ahead to the parliamentary elections coming up in June. What does this election, particularly with the broader array of candidates in the first round, what sort of information can we glean about how that turned out, and what that might tell us about how the parliamentary elections are going to shape out? And how that is then going to affect them Macron's term?

BELIN: So, if I may, on this front, some of them most ambitious political opponents of Emmanuel Macron, frustrated with the first round, are hoping to make the legislative elections the third round of this presidential election. In particular, Jean-Luc Mélenchon, again a candidate of La France Insoumise, the far left party, wants to rebrand his coalition behind him L'Union Populaire, the Popular Union behind him, and he has already announced, between the first and the second round, that to him the legislative elections are going to be a third round for which he's running for Prime Minister. That does not exist in France. This is not the way the system works, but what he means by this is that if he was able to gather enough MPs at the legislative election, he could force the president to choose him as a prime minister and impose a cohabitation, which has happened in the past with a president of one color and a prime minister of a different political color.

We are extremely far from this scenario. At this point, the first polls are showing that Emmanuel Macron is likely to have a majority, a small majority, potentially smaller than in 2017, but if he has enough coalitions with centrist parties, smaller parties here and there, and gathers enough MPs, he's likely to get a governing majority. What is clear is that you have a shake-up amongst traditional parties., Center-right and center-left have really suffered big hits in the first round of the election, with both actually female candidates of these two parties, the Socialist Party candidate Anne Hidalgo not even getting 2% of the vote, the Le Republican candidate Valérie Pécresse getting for less than 5% of the vote, these two parties are in high difficulty for the legislative election, while the Nationalists of Marine Le Pen, and the far-left or Popular Union candidate of Jean-Luc Mélenchon are likely to gather many more than they had in 2017. So Macron, potentially a governing majority, but facing strong minorities that are really an anti-Macron front that he will have to deal with in the next five years.

BLOCH: I would just add that it seems already like there is a lot of mobilization on this left portion, despite the fact that we talked about there no longer being so much of a left-right divide. I think there is still a left that is trying to mobilize for the legislative or parliamentary elections in June. I mean we have to remember that, yes, 58.5% of French voted for Macron, 41.5 roughly for Marine Le Pen, but those numbers don't pay attention to the fact that there was 28% abstention, and even more voters beyond that cast either null or blank votes for neither of the two candidates who were on the ballot. I think among those who abstained, the left is highly represented, rejecting the choice that was being given to them. I think those voters will be able to get excited about more grassroots, community-based and community-invested candidates who will be advancing their own candidacies for the parliamentary elections, and I think that will be one thing to keep an eye out for.

It's also going to be essential for Macron to try to speak to the people, to reinvent himself to the extent that he can, to the extent that he's able to convince people that he is reinventing himself, to consult and engage in direct democracy because that's precisely what the gilets jaunes, the yellow vest movement, was rejecting, the fact that he wasn't engaging in these kinds of consultations and was disconnected from them. So those are two of the trends that I think we can watch.

PITA: All right, well Célia and Agneska, thank you both very much for joining us today.

BELIN: Thank you.

BLOCH: Thank you for having us.