

## Key insights into the 26M



**PSOE** is the clear winner of the 26-M electoral round. The party will govern in most regions and municipalities, and it scores a historical victory in the European elections.

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PP suffers a crushing defeat, taking home only two consolation prices: (1) managing to avoid Ciudadanos from overtaking it and (2) having the possibility of forming a government in both the region and the city of Madrid, which are key to this electoral round.

Ciudadanos fails to beat PP to the first place as the main center-right party, but it remains key to all Government coalition scenarios.

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Unidas Podemos' internal divisions have deplete the party's influence at all levels, both in the formation of coalition governments and in policy setting.

26M has closed the chapter of the "municipalities of change". With the exception of Cádiz (where Kichi emerges reinforced), Manuela Carmena and Ada Colau represent the end of the cycle.

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# Key insights into the 26M



In the context of the upcoming investiture of the new Primer Minister, Podemos has lost quite some leverage in future negotiations to claim positions which would be key in the Executive branch of government and to define its the political agenda.

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In contrast to Unidas Podemos, the rest of parties who would potentially support Pedro Sanchez's government (PNV, CC, PRC, ERC) see their position consolidated in their respective territories and circumscriptions.

Vox sees a sharp drop in its support levels, plummeting from 10 to 6% in under a month), but it remains a necessary ally to those parties wishing to form coalition governments in key municipalities.

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Spain wins a very relevant level of influence in the European institutions, taking into account that it will rank as the first social-democrat force within the corresponding European parliamentary group.

Anti-European forces represent over 25% of seats in the European Parliament and become first force in four of the six most populated EU countries (France, Italy, UK and Poland).

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We have consolidated our position as first political force. I would like to appeal to political leaders' responsibility not to leave municipal and regional governments in the hands of farright parties."



### (populares\*

Although a month a go some were taking our defeat for granted, we knew they were wrong to do so. For those who intended to replace us, you'll see that the People's Party is here to stay."



### Ciudadanos

Every time polling stations open their doors, there is a common elements throughout the country: the orange wave keeps mounting. We will be key in regional and local governments."





[No comment thus far.]



Vox will make its votes count, refusing to be held down by other forces. Despite the appeal to "useful votes", Vox has

resisted and made a

strong entry, consolidating its political force."





## Main running parties to the 26-M





A bittersweet victory for PSOE. Once again, Pedro Sánchez emerges reinforced from the elections following his group's European victory and after its territorial power in the regional ones (as a result of becoming the most voted force in most regions). Nevertheless, the 26-M has issued a warning in several territories, specially in the region of Madrid. In total, PSOE won in 10 regions, but the right-wing government pacts will preventing from ruling in all.



PP catches a break on the 26-M. José Luis Martínez Almeida and Isabel Díaz Ayuso results give Pablo Casado a break, who consolidates his national leadership in the opposition. Although PP loses La Rioja and ceases to be the most voted force in some of its traditional strongholds (e.g. Murcia, the Community of Valencia or Castille-La Mancha), they will manage to hold on to three of its regional governments: Castille and Leon, Madrid and Murcia.



Unidas Podemos take another fall. The 26-M confirms the end of Podemos in Vistalegre after the party fails to hold on to its "municipalities f change" –with the exception of Cádiz–, and following its vanishing from regional parliaments of Valencia or Castille-La Mancha, where it held the second vice-presidency. Pablo Iglesias was the only national leader who did not make any comment on the night of the election. Its deep fall both at the regional and local level, together with a drop of 1M votes at the national level since 2016, will mark the negotiation terms in a future coalition government with PSOE.



**Ciudadanos fails to outrank PP**, which it was close to achieving in several regions and big cities following the past general elections of last April 28<sup>th</sup>. In exchange, Cs will be able to govern alongside PP in Madrid and Murcia, and will hold the key to government in Aragon and Castille and Leon. Albert Rivera is no longer in a position to claim the opposition leadership -the comeback of PP has made this possibility to vanished.



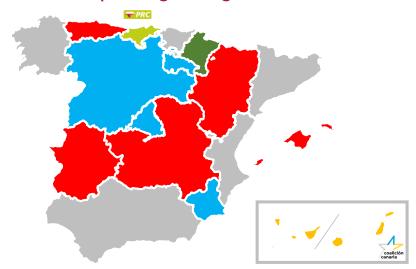
Vox slows down, but comes closer to power. The party will enter many regional and local institutions, but it still fails to fulfill the expectations of Santiago Abascal. The regions of Murcia and Spain become two of the party's strongest support bases -as we anticipated in our previous reports--, which means Vox will prove decisive in PP's ability to retain the regional and municipal government of Madrid.

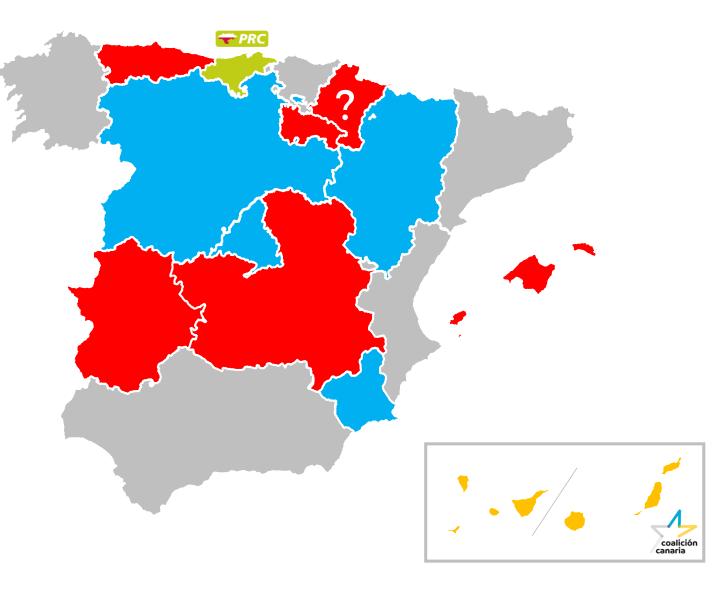
# Regional election map



- **PSOE** has managed to be the most voted party in 10 of Spain's 12 regions. However, right-wing government acts will make it impossible for PSOE to rule in all.
- **PP** retains the regional government of Madrid and recovers Aragon, but loses La Rioja. Ciudadanos' will to "regenerate" could endanger PP's victory in Castille and Leon and Murcia.
- The election day results in a political map which is relatively similar to that of 2015. Against a backdrop pf high political "atomization", the two representatives of the two-party system continue to hog the majority of regional power.

### 2015-2019 Map of regional governments.





## Election map for province capital cities





PSOE wills the municipal elections and renovates its victory in many provinces' capital cities such as Palma de Mallorca, Seville, A Coruña or Vigo.



PP could win the majority of these capital cities if it manages to strike a deal with Ciudadanos and Vox, thus recovering the power in key cities such as Madrid or Zaragoza.



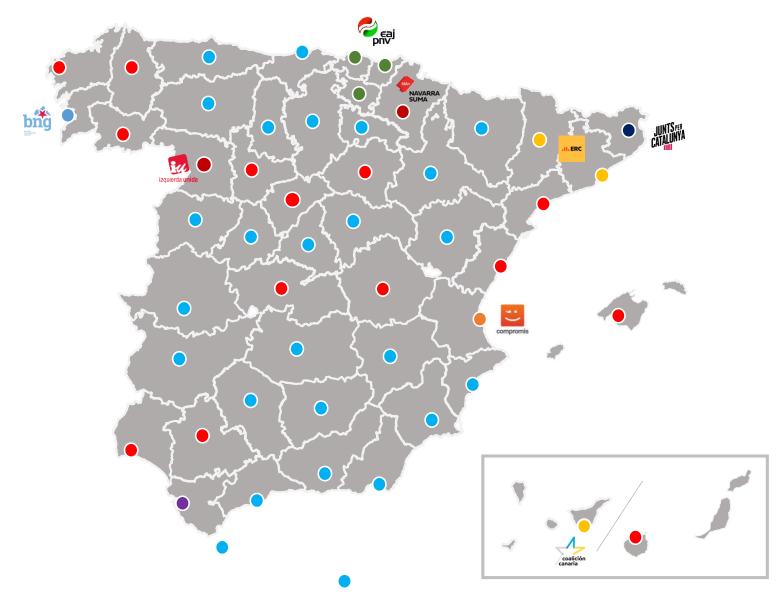
Unidas Podemos loses steam in the municipal context. Kichi's victory in Cádiz is worthy of mention, since it came close to achieving absolute majority.



Ciudadanos fails to overtake PP in all capital cities. Nonetheless, its support is crucial to hand over power to PP in several capitals, such as Madrid.



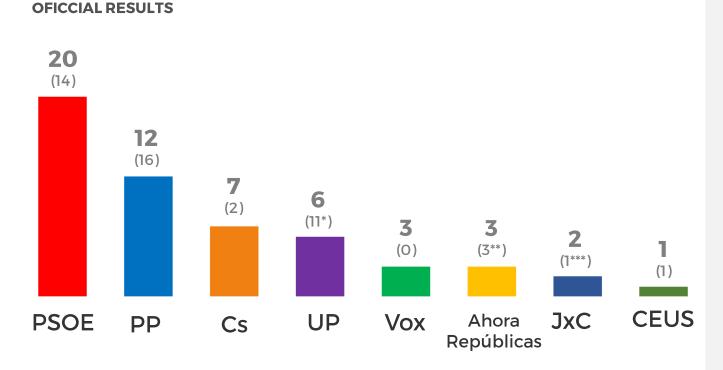
Vox does not secure a single local government, but it still plays a key role in handing over power to PP in several capital cities.





### Spanish results

The Socialist party wins and there is a draw between blocs



<sup>\*</sup>In 2014, IU and Podemos ran separtely obtaining 6 and 5 MEP's respectively.



### **PSOE** obtains an important victory

• The **PSOE** gets a larger victory than expected and becomes the party with more seats in the group of European Socialists. The left block manages to clearly overcome the center-right block by 4 points.

#### A PP in free fall is able to maintain its second position

- Ciudadanos fails to overtake PP. Despite rising five seats, the orange formation is unable to surpass a PP in decline that achieves its worst historical result in a European election.
- Vox manages to enter the European Parliament with a discrete result and with almost 50% less votes compared to 28-A.
- In the nationalist realm, the coalition led by Junqueras (Ahora Repúblicas) surpasses Junts per Cataluña, of former President Puigdemont. Both candidates get a seat more than expected thanks to the high participation in Catalonia. The PNV maintains its seat and Compromís loses it.

#### A high turnout

• The participation (64.35%) has been higher than the last European elections, in which 43.81% of the Spaniards voted.

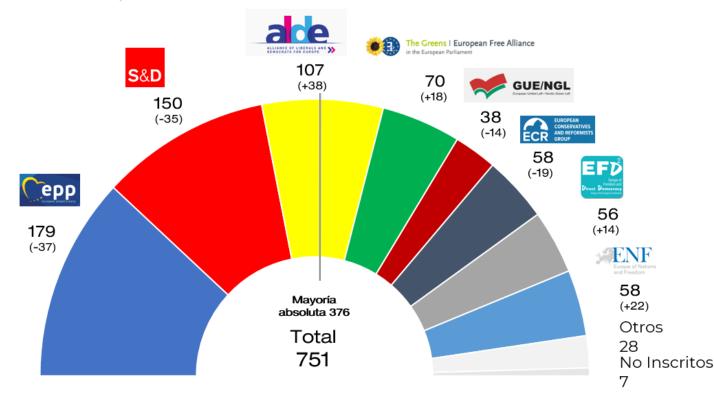
<sup>\*\*</sup>In the past elections ERC, in coalition with La Izquierda por el Derecho a Decidir, obtained 2 MEP's and EH Bildu, in Los Pueblos Deciden, 1.

<sup>\*\*\*</sup>CIU in coalition with PNV, now in CEUS, obtained 2 MEP's, 1 for the current Junts and another for Unió.

## The new European Parliament

The decline of the bipartidim in the European Parliament







#### The end of the Grand Coalition

For the first time, since the first elections to the European Parliament held in 1979, the two largest European political families, popular and socialist, fail to exceed 50% of the seats.

### Towards a new Europeanist consensus; liberals and greens will be decisive

Given this scenario, the liberals of the ALDE Group, with the confirmed entry of Emmanuel Macron's party, will play a key role in the governance of the EU and in the appointment of the new senior community leaders. A consensus that could include the Greens, which achieved a significant rise thanks to its push in Germany and its meritorious third place in France, together with a good result in other countries and the surprise entry in Portugal.

#### The rise of the extreme right and euroscepticism

The extreme right is the first force in 3 of the 4 countries with the most population in the EU and that more seats are distributed in the European Parliament (United Kingdom, France and Italy).

The different Eurosceptic groups add more than 150 seats, about 25% of the total. However, they are unable to reach the 33% that would allow them to block parliamentary activity, but they will have enough force to change the parliamentary dynamics and try to paralyze the functioning of the EU in the Council, starting with the designation of the candidate to preside over the Commission that must be decided in its next meeting.

The convincing victory of Salvini will allow him to lead the new European Alliance of Peoples and Nations (EAPN), which will replace the ENF, and which could become the fourth largest parliamentary group.

### Country by country





- The CDU gets a comfortable victory. The Greens, encouraged by the urban vote, have won in key cities such as Berlin and, supported by the young vote, they suprass Social Democrats, confirming their rising trend.
- The **Europhobic Alternative for Germany** gets a discreet 10%, which relegates them to the fourth position. The frustrating result of the SPD, punished for its participation in the Grand Coalition that governs Germany, could provoke an electoral advance.



- The Brexit Party gets a resounding victory in a historic collapse of the Conservatives, who get the fourth place after the resignation of Theresa May. Liberals experience a spectacular rise, going from 1 to 15 MEPs. Voters have rewarded those parties that have clearly positioned themselves in relation to the departure of the United Kingdom from the EU.
- In this division, parties favoring a hard Brexit have obtained 35.1% of the votes while the pro-Europeans have exceeded 40%.



- Le Pen repeats victory in European elections against La Republique In Marche of President Emmanuel Macron.
- The Greens reach the third position while the historical parties, the Republicans and the Socialist Party, continue in fall.
- Despite the defeat, the entry of Macron in the liberal group ALDE and its strength in the Council, leading the rest of the Liberal prime ministers, will allow him to promote his refoundation project and try to obtain some key position in the community institutions.



- Salvini's Lega obtains an unappealable victory that makes him the hegemonic party in Italy. Helped by the great participation in northern Italy, its historic bastion, this result will allow him to lead the parliamentary group he has built, the European Alliance of Peoples and Nations (EAPN). Salvini could be tempted to provoke a government crisis and call early elections, to govern alone.
- PD socialists outperform the 5 Star Movement and become the main opposition party, improving the results of generals.



• The Europeanist coalition fails to overcome the ruling Law and Justice, as it did in the last municipal elections when they won in the capital, Warsaw.



- In **Greece**, the formation of center-right New Democracy has defeated Syriza of President Alexis Tsipras leading to a government crisis and call for elections
- In Portugal, the Socialist Party continues to be the hegemonic party since Antonio Costa came to power in 2015.
- In the Netherlands, the Social Democrat candidate for the Commission, Frans Timmermans, wins the victory over Liberal Prime Minister Mark Rutte.
- In Hungary, Viktor Orbán achieves a relentless triumph with 52% of the votes.

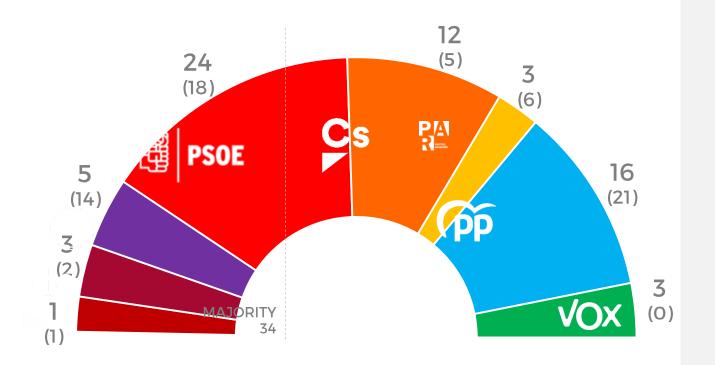


## Region of Aragon

**PSOE** wins but might lose the Government: Ciudadanos decides

#### **POSSIBLE GOVERNMENT SCENARIOS:**

- 1. PP + Cs + PAR +Vox. Right bloc coalition Government (High probability)
- 2. PSOE + Cs. Governmenet of PSOE + Cs | (Lower probability)





- The PSOE of former President Lamban improves its results and wins the elections, although the left parties are not able to gather a majority of the regional parliament seats.
- PP might be able to recover Aragon with the support of Ciudadanos, PAR y Vox. Together gather 34 seats, the majority of the parliament.
- The sum of PSOE and Ciudadanos might be the easiest way to achieve the majority. This could be a possibility, as Lamban was a leader opposed to the politics of Spain's President Pedro Sánchez, though Rivera's policy might make this option difficult.
- Regionalist party PAR might be key for the future Government...

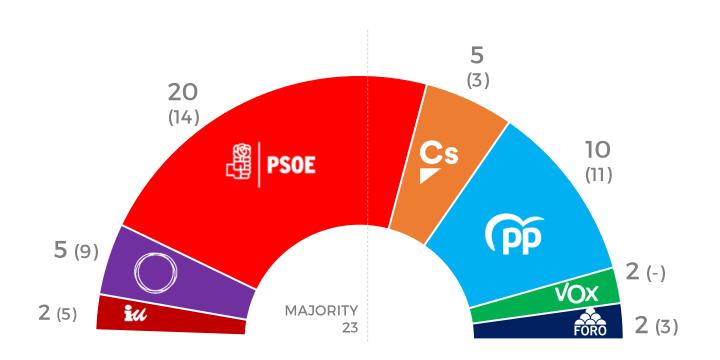
### **Asturias**

### **PSOE** is twice bigger than PP



#### **POSSIBLE GOVERNMENT SCENARIOS DE GOBIERNO:**

- 1. PSOE + Podemos + IU. Left pact.
- 2. PSOE in minority. In Asturias, in second investiture vote, as the President would be the candidate with more votes in favour than against.



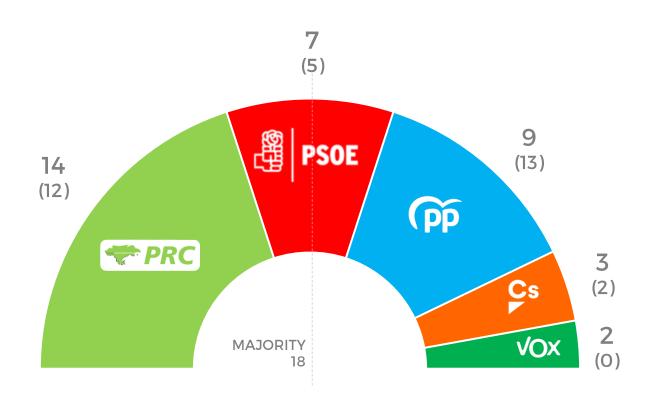
- PSOE wins the elections and is only at 3 seats to achieve absolute majority in the regional parliament, although it would need the support of Podemos to pursue parliamentary initiatives.
- Podemos loses 4 seats, but its seats are going to be key for the future Government.
- PP y Foro Asturias loses one seat respectively, in favour of VOX.
- The Asturian right recovers the capital City Hall of Oviedo, where PP could Govern with the support of VOX and Foro Asturias.

### Cantabria

### Revilla keeps the presidency with PSOE's support

#### **POSSIBLE GOVERNMENT SCENARIO:**

PRC + PSOE. Revilla repeats the current Government coalition.





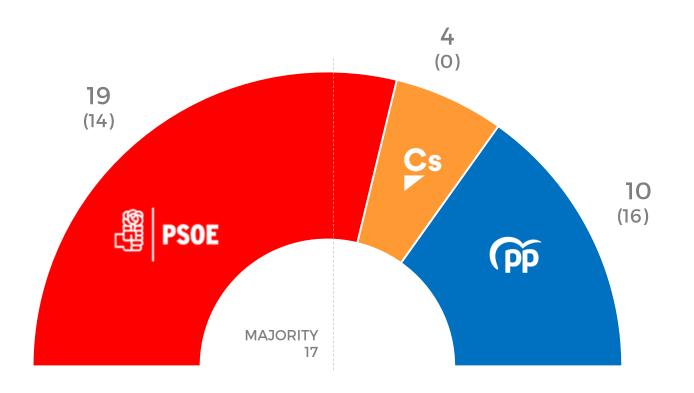
- Revilla, President of Cantabria regionalist party PRC leader, will lead the region with the support of PSOE.
- The PRC achievement of having one MP in the Congress will easy the support of PSOE to Revilla, as this MP will support Sanchez to be the next Spain's President..
- PP continues its reduction trend, not being the most voted force in the region since 2015.
- Ciudadanos increases its parliamentary representation with one more seat, less than expected.
- The irruption of Vox in the parliament, with 2 seats, does not change the political balance in the region.
- Podemos loses its 3 regional MPs and does not have representation for this political term.

### Castille - La Mancha

García-Page (PSOE) will Govern with absolute majority



**Gobierno of PSOE** 





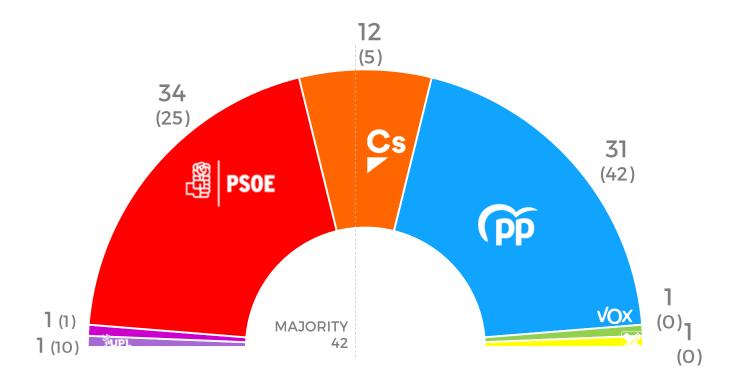
- PSOE achieves an excellent result, being the first political force, and making Castile-La Mancha one of the main Socialist strongholds.
- Emiliano García-Page becomes on of the main Socialist leaders in Spain.
- PP continues shrinking in political terms, and loses 10% of the votes achieved for years ago.
- Ciudadanos enters in the regional parliament with four seats for the first time, although with no real power, due to the Socialist majority.
- Podemos, former Page's Government partner, loses its representation.

### Castille and Leon

PSOE achieves a pyrrhic victory. The right forces will keep the Government

#### **POSSIBLE GOVERNMENT SCENARIOS:**

- 1. PP + Cs. Coalition government lead by PP (High probability)
- 2. PSOE + Cs. Coalition Government lead by PSOE (Medium probability)





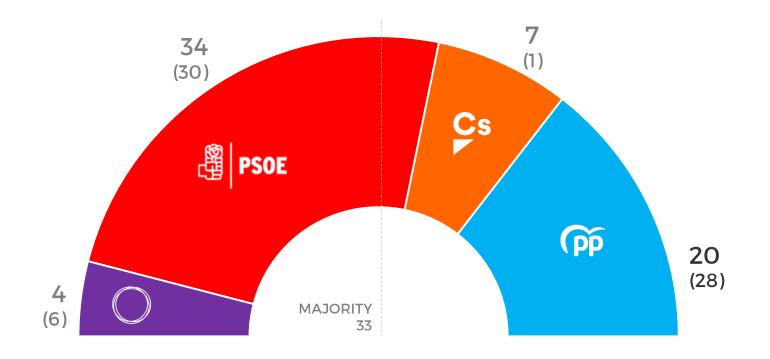
- PP de Castile and Leon loses the regional elections for the first time in 32 years due to the competition of Vox and Ciudadanos.
- PP would need the inly support of Ciudadanos to keept the regional Government.
- Socialist Luis Tudanca wins the elections with 34 seats. The PSOE has not win in this region since 1983.
- The strong fall of Podemos, that goes from 10 to 1 seat, makes impossible for PSOE to make a left Government coalition.
- XAV, new party that removed PP as leading party in Avila, enters in the regional Parliament with one seat.
- · UPL Leon party keeps its seat.

### Extremadura

**PSOE of Fernández Vara achieves the absolute majority** 

#### **GOVERNMENT SECENARIO:**

1. Government of PSOE





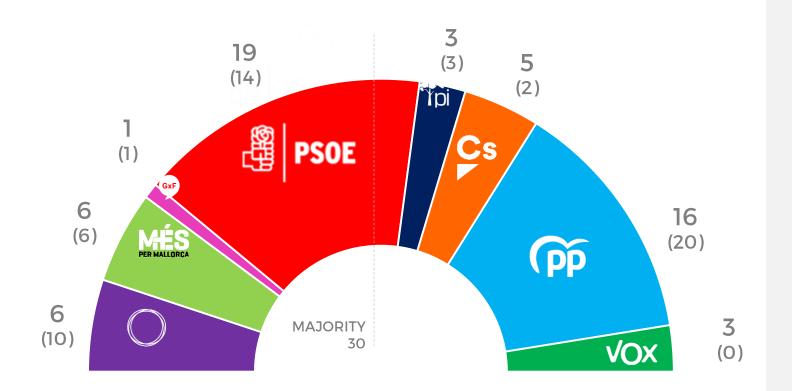
- PSOE achieves the absolute majority, keeping current president Guillermo Fernández Vara in power, with no need of external support.
- PP suffers and important reduction of votes and seats, that went to Ciudadanos..
- Ciudadanos strongly increases its parliamentary representation, although will no real capacity of influence to the regional Government.

### **Balearic Islands**

Armengol repeats as regional President, with the same coalition

#### **POSSIBLE GOVERNMENT SCENARIO:**

Repetition of current Governmenet pact of PSOE as President with the support of Més, Podemos and Gent per Formentera.





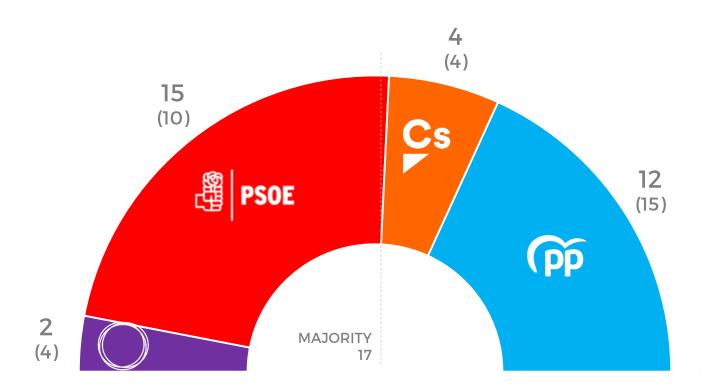
- Balearic Islands return to a vey fragmentated political scenarios, with 8 regional parties.
- The current president has been able to improve its electoral results, along with the better results of PSOE in a national level.
- Podemos loses 4 seats, but still key for the future Governmenet.
- PP loses 4 seats and Vox enters in the regional Parliament with 3. A coalition of PP, Ciudadanos and Vox will not gather the needed majority to pursue a Government.

# La Rioja

### El PSOE gana y suma con Unidas Podemos para desbancar al PP

#### **POSIBLE ESCENARIO DE GOBIERNO**

1. PSOE + Podemos . [Alta probabilidad]





#### CLAVES

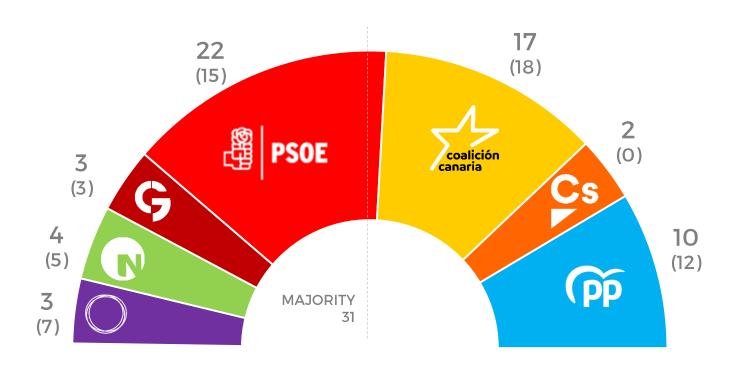
- Cambio histórico en La Rioja. El PSOE gana las elecciones y gobernará La Rioja si consigue el apoyo de Unidas Podemos. De esta manera la socialista Concha Andreu se convertirá en la Presidenta de La Rioja y recupera para el PSOE la Comunidad Autónoma, que no gobierna desde 1995.
- Declive del PP, que pierde un feudo histórico. Por primera vez desde 1995 el PP no gana las elecciones en La Rioja y dejará de gobernar uno de sus feudos históricos. Pierde dos escaños y pasa de 14 a 12.
- PRC y VOX, fuera del Parlamento. Ni el partido Riojano ni VOX consiguen entrar en el Parlamento riojano, obteniendo ambas formaciones discretos resultados electorales.
- Ciudadanos obtiene cuatro escaños, aunque no es decisivo. El partido naranja no consigue mejorar los resultados de hace cuatro años y obtiene 4 representantes, que se convierten en insuficientes para un pacto con el PP.

## **Canary Islands**

Left-wing bloc, with important possibilities to Govern

#### **POSSIBLE GOVERNEMENT SCENARIOS:**

- 1. PSOE + UP + NC + ASG. Left- wing Government lead by PSOE (High probability)
- 2. PSOE + CC. Government lead by PSOE and CC (Medium probability)





#### **CLAVES**

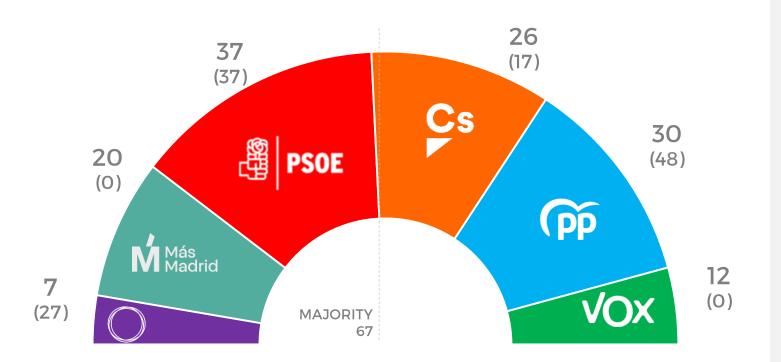
- PSOE wins the elections and might be able to Govern with the support of Nueva Canarias, Podemos and ASG.
- Although, if Pedro Sanchez were in need of further supports in the Congress to become President, and were looking for support of Coalición Canaria, this party might put as condition, its entrance in a Canarian government.
- The rght wing bloc does not gather a majority of the seats, among other reasons, due to the ad result of Vox, that was not able to enter in the Parliament.

## **Region of Madrid**

PP keeps the presidency in extremis

#### **POSSIBLE GOVERNMENT SCENARIOS:**

1. PP + Cs + Vox. Right-wing Government lead by PP (high probability)





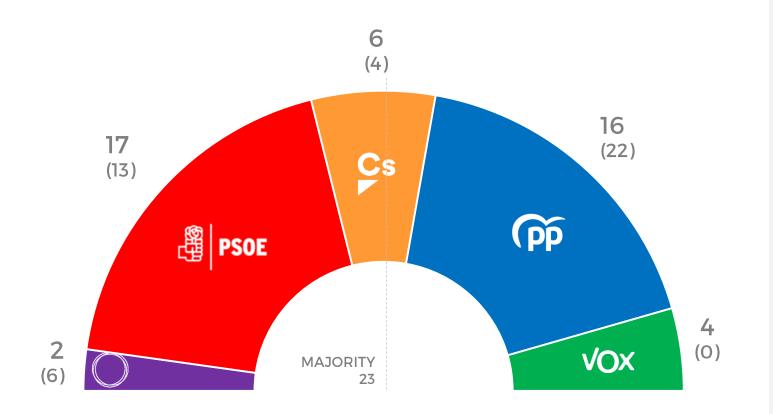
- As forecasted in the previous KREAB Research Unit paper, Isabel Díaz Ayuso has important chances to become the next President of the Region Of Madrid, with the support of Ciudadanos and Vox. Although Ángel Gabilondo was the most voted during this elections, he has no real possibilities to gather the needed support from Ciudadanos.
- PP has lost one third of its seats, that have gone to Ciudadanos and Vox.
- Madrid becomes, along with Murcia, in one of the main Vox strongholds, and one of the key parties for Madrid's future Governing stability.
- The new party, Mas Madrid (Podemos split force) and the bad results of Podemos in the region, might be a changing point in the left-wing force, that could weak the position of the party during the negotiations with Pedro Sánchez for the future Government of Spain, making difficult to Pablo Iglesias to demand strong positions for his party in the new Government of Spain.

## Region of Murcia

PP will Govern four more years with the support of Ciudadanos and Vox

#### **POSSIBLE GOVERNMENT SCENARIOS:**

- 1. **PP + Cs + Vox**. Right-wing Government (High probability)
- 2. PSOE + Cs. PSOE lead Government with the support of Ciudadanos (low probability)





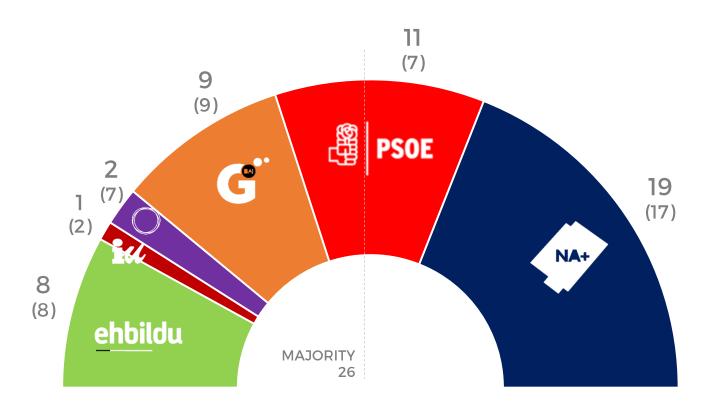
- PP and PSOE share the victory in the region, with a minimum and historic advantage of PSOE, with one more parliamentary seat.
- PP suffers major loses, compared with the previous term, although is able to keep the Government in one if its main political stronghold (Governed since 1995) with a possible agreement with Vox and Ciudadanos.
- PSOE achieves an strong result, in a region traditionally not so favourable to this party.
- Ciudadanos improves its results and would be key for the future Government of the Region. In theiR hands will have the future of the region. They could give the Government to PSOE or repeat the agreement with PP.
- Vox enters in the Parliament and, along with Madrid, Murcia becomes one of their main strongholds.

### **Navarra**

Strong victory of Navarra Suma. PSN (Socialist party) becomes key for the the future of the Region .

#### **POSSIBLE GOVERNMENET SCENARIOS:**

- 1. PSOE + GBAI + UP + IU and absence of EH Bildu (medium-high probability)
- 2. PSOE + GBai and absence of Podemos and Izquierda Unida (medium probability)
- 3. Navarra Suma (and absence of PSOE( (low probability)





- Strong victory of right coalition Navarra Suma, but not enough for a future Government. It has been shown that, with this coalition, the right forces are able to get more seats (19) rather than going alone (15 for Union del Pueblo Navarro, 2 for PP and 0 for Ciudadanos).
- PSN achieves the second position as most voted party, and improving their results compared with the previous term.
- Former president Uxue Barcos' party becomes the third force, not being able to capitalise its leading position as president during the previous term.
- It is seen as possible a political pact lead by PSOE, and supported by Geroa Bai, Podemos and Izquierda Unida, with the absence of EH Bildu., or even Podemos too.
- It is not seen as possible the scenario of a Government of Navarra Suma with the absence of PSOE.

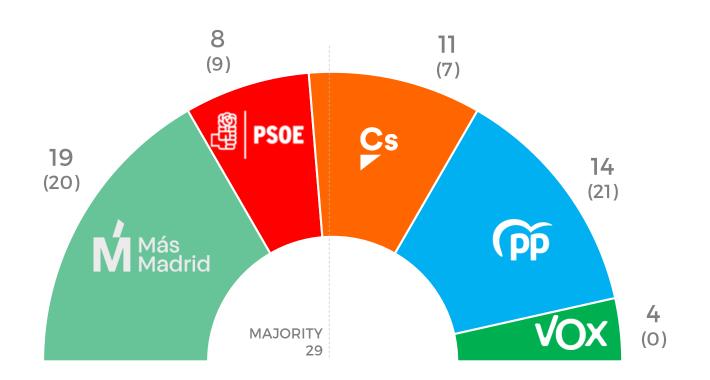


## **Madrid City Council**

The right wing block surpasses Carmena

#### **Government scenarios**

1. PP + Cs + Vox. Right wing coalition





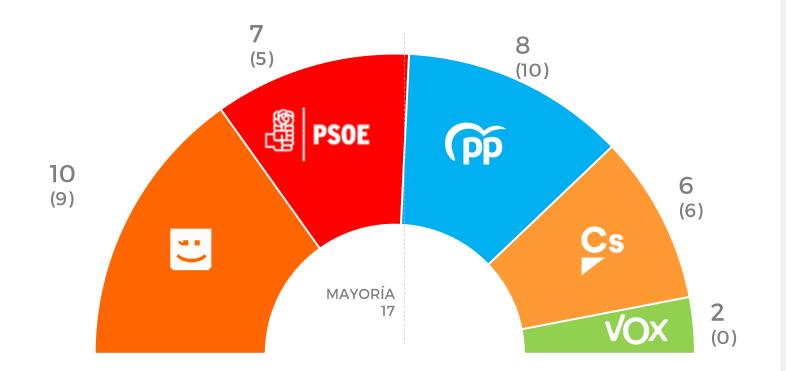
- Mas Madrid loses one councilor with respect to 2015, but it is enough for Carmen to lose her majority, she has already announced that she will abandon the political arena. PSOE maintains its 9 councilmen, but are not enough to form a left wing majority.
- Martinez-Almeida will be the new mayor of the capital, although PP loses 7 councilors due to the fragmentation of the right-wing vote. Ciudadanos achieve 4 seats more than in 2015, and Vox bursts into the consistory with 4 councilors.
- The drop in participation in districts with lower income per capita, in which the electorate did not mobilize in the same way as in the general elections, leaves the *left* with no options for the formation of a government a government.
- The votes for Madrid en Pie (IU), the formation for which Pablo Iglesias asked for the vote in the final stretch of the campaign, subtract support to the left block: they were unable to overcome the 5% barrier leaving them outside the consistory facilitating the conformation of a right wing government.
- End of the 'star' policies of Carmena: mobility (ordinance of mobility, lanes bike); housing (limitations on rental and tourist accommodation); Climate change (Central Madrid, ...)

## Ayuntamiento de Valencia

El bloque de izquierdas alcanza de manera ajustada la mayoría absoluta y Ribó seguirá siendo Alcalde

#### **ESCENARIO DE GOBIERNO:**

Compromís + PSPV. Reedición de la actual fórmula Gobierno.





#### **CLAVES**

- La suma de Compromís y PSPV alcanza la mayoría absoluta con resultados muy ajustados, y reeditará el un pacto de izquierdas en una ciudad que tradicionalmente dio mayorías al PP.
- Compromís seguirá liderando el bloque de la izquierda con Joan Ribó al frente de la Alcaldía, que previsiblemente tendrá que incluir a un PSOE al alza en la Junta de Gobierno.
- Podemos no consigue entrar en el consistorio, perdiendo así sus 3 ediles.
- El PP pierde 2 concejales pero logra evitar el sorpasso de Ciudadanos, con una lista en la que no repite ni uno de sus concejales anteriores.
- Vox entra por primera vez en el Ayuntamiento con 2 concejales.

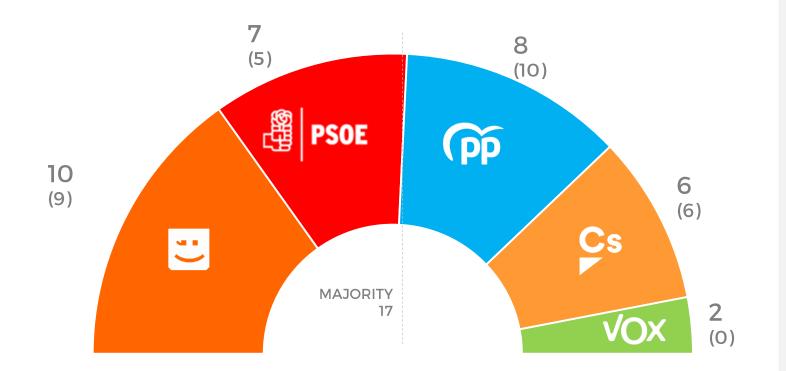


# Valencia City Council

The left-wing block reaches the absolute majority in an adjusted manner and Ribó will remain the Mayor

#### **Government scenarios**

Compromís + PSPV. Repeat of the current local government formula





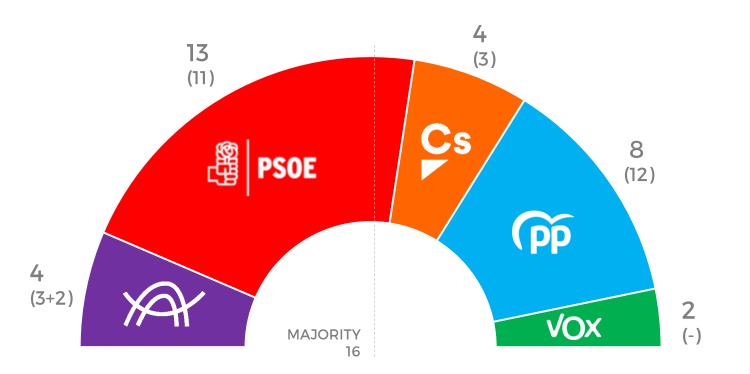
- The sum of Compromis and PSPV reaches an absolute majority with very tight results, and will reedit a left -wing pact in a city that traditionally gave majorities to the PP.
- Compromís will continue to lead the left bloc with Joan Ribó as head of the Mayor's Office, which will foreseeably have to include PSOE in the Governing Board.
- Podemos is unable to enter into the town hall, losing its 3 councilors.
- **PP loses 2 councilors** but manages to avoid the surpass of Citizens, with a list in which it does not repeat any of its current councilors.
- Vox enters the Town Hall for the first time with 2 councilors..

# **Seville City Council**

The socialist party consolidates its local power

#### **Government scenarios**

PSOE + Adelante Sevilla. Repeat of the current local government formula





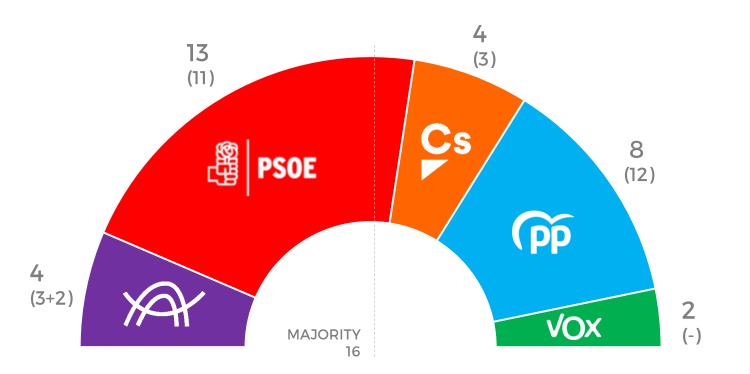
- Juan Espadas (PSOE) wins and will maintain the Mayor's office, although he will need the support of Adelante Sevilla. The PSOE gets a comfortable victory and snatches the first position to the PP, rising from 11 to 13 seats and with 7 points more than in 2015.
- The left-wing bloc benefits from the comeback of the PSOE and the division of the right-wing vote, which is impaired due to the fragmentation between PP, Ciudadanos and Vox.
- The PP collapses and obtains its worst results since 1983. Main victim of the fragmentation of the right-wing vote, falls more than 10 points with respect to 2015, loses 4 councilors and ceases to be the most voted force of the consistory.
- The union of Participa Sevilla and Izquierda Unida in Adelante Sevilla is left with a bittersweet result, because although they are the key to the government, they lose 4,000 votes and one seat compared to 2015, where they run separately.
- Ciudadanos suffers the consequences of a last minute candidate and stagnates, rising just 10,000 votes and one seat compared to 2015.
- **Vox** enters the Plaza Nueva for the first time with about 25.000 votes and 2 seats.

# **Seville City Council**

The socialist party consolidates its local power

#### **Government scenarios**

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