

12-M Pre-election analysis AN UNCERTAIN FUTURE FOR THE CATALONIA POST *PROCÉS*





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PRE-ELECTION KEYS what can we expect from 12-m?



The lack of support for the regional budgets for 2024 proposed by the Government, agreed with the PSC, led *President* Pere Aragonès to call early elections for May 12th. The legislature that is now coming to an end seemed complex from its beginning in 2021 and, even more so, after Junts' departure from the Government a year later, as the parliamentary weakness of ERC has prevented progress with the legislative agenda.



Hard Rock, an obstacle for the *post-procés* course

In the last two years, after more than a decade of the *procés*, a **change of axis in Catalan politics from national to social** had been confirmed, with the rapprochement of the ERC with the PSC and En Comú Podem. In 2024, Aragonès' party aspired to repeat this formula in order to achieve the third consecutive budget approval, but the Hard Rock casino project in Tarragona became an obstacle between its two partners.



The electoral campaign coincides with the **passage through national Parliament of the Amnesty Law**, which will come into force at the end of May and will facilitate the return to Catalonia of proindependence politicians abroad since 2017: among them, Carles Puigdemont, who should be able to enter Parliament to be invested, even though he knows he could be arrested. In addition, the **nationalists and the government are aware of their mutual dependence**.



...and doubts about Pedro Sánchez's future.

Doubts about Pedro Sánchez's continuity at the head of the Spanish government have fully conditioned the start of the campaign. The president has shifted the focus of attention, which had been on *former Catalan president* Puigdemont and his chances of returning to Catalonia since the elections were called. It remains to be seen whether this manoeuvre is decisive for the **mobilisation of the socialist electorate** and to what extent it is harmful to other political spaces, particularly the Comuns.



Salvador Illa will win, but will require (complex) alliances

PSC, Junts and ERC are once again vying for the presidency of the Generalitat in a new three-way battle. The polls agree that the winner will be PSC, but they will need to reach an agreement in order to be sworn in as *president* and, therefore, that an alternative pro-independence majority does not win 68 seats. One way or another, several parties will have to come to an agreement or else a **repeat election** could be triggered **in October**.



Independence could lose its "52%" majority

The **pro-independence bloc arrives at the elections more divided than ever**: while Puigdemont's supporters demand "pro-independence unity", ERC accuses Junts of not having exercised it in recent years, and both are **vying for leadership of the bloc**. In addition, the CUP is making a sovereignty pact conditional on a "radical" change, and the emergence of Aliança Catalana, the **proindependence extreme right**, which is very active on social networks, is expected.

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With an eye on Madrid

After the Basque elections in April and on the eve of the European elections campaign, 12-M will serve as a **political thermometer**. What happens in Catalonia will have implications at the state level, as it could **alter the majority that sustains the Spanish government and threaten its stability and even its continuity** if any of the investiture partners, especially Junts, were to run out of incentives to continue supporting Sánchez.

Communicating vessels with Barcelona City Council

Jaume Collboni has had to submit to a question of confidence, but in the end he has managed to push through a budget that gives him some breathing space at the start of a term of office marked by his minority in the plenary. The early Catalan elections thwarted plans to expand the government with ERC. Since then, negotiations have been ongoing while waiting to find out what the PSC's needs are after 12-M and whether the Barcelona City Council will be a bargaining chip for the Generalitat.





With just under a week to go until the elections, the average of the polls published since Pere Aragonès dissolved the Parliament in March shows a clear picture: Salvador Illa in the lead, followed by Carles Puigdemont and Aragonès himself. However, it will all depend on the dance of a few seats due to the high number of undecided voters and a very evenly matched and fragmented bloc.

All the polls point to an **unequivocal victory for the PSC**, which, unlike in 2021, would be more comfortable and could place the socialists in a position to **reach the presidency of the Generalitat** fourteen years after the collapse of the second *tripartit*. Moreover, Pedro Sánchez's announcement of his continuity at the head of the Executive has further strengthened his position, **at the expense of Comuns Sumar**, for whom the campaign is taking a long time.

In the dispute for leadership in the proindependence space, the trend in recent weeks has been **very positive for Puigdemont, who has regained second place**, overtaking ERC and maintaining results similar to those of three years ago. The Republicans, on the other hand, have been on a downward trend since the first polls both before and after the call for elections.

The **PP**, for its part, which is coming off its worst results in 2021, would rise sufficiently to consolidate its position as the fourth parliamentary force, albeit unchanged since the campaign began, while **VOX and CUP** have stagnated in the polls.

In the campaign **there has been no news for Ciudadanos**, as the polls have confirmed its downward trend until its disappearance from Parliament. The opposite is true for **Aliança Catalana, which is on the rise** and is expected to win several MPs in the chamber.



No result will make it possible to know on the night of 12-M who will occupy the Palau de la Generalitat, which means that a period of uncertain negotiations will have to be opened. The following is a **breakdown of five scenarios, ordered from most likely to least likely**:



With their foreseeable victory, the **Socialists will have the opportunity to put together a new government that will consolidate the change of cycle in Catalonia.** Although the PSC's main aspiration is a solo executive, in order to guarantee a solid majority it will need the **external support of the ERC and the Comuns or to incorporate one or both of them into the government team.** This last option, which would be reminiscent of the *tripartite* years and would align support at the state and Barcelona levels, was already a real possibility in 2021, but the vetoes and differences in the national axis between Republicans and socialists made it impossible for it to come to fruition.

Now, polls confirm that a new window of opportunity will open for this formula, as the three parties would reach 68 MPs. The Comuns are confident that they will be decisive and will try to make their support for Illa conditional on a government pact that includes them. Moreover, **the possible lack of a pro-independence majority could bring about a definitive rapprochement between the Socialists and Republicans**, but ERC will be forced to decide whether to facilitate governability from outside in order to avoid a repeat election or whether to remain in the Government in a move that would be difficult to explain to its more pro-sovereignty electorate.



SCENARIO 2

Fragmentation and political polarisation open up a **scenario of potential deadlock**, which could lead to **new elections in October**. During the three months or so that the parties will have to negotiate, all options for an investiture will be considered, although the parties will have different incentives to give in or to force a rerun.

The PSC's victory does not guarantee Salvador Illa the presidency due to the complicated arithmetic required, marked by the **cross vetoes between parties and ideological blocs**. However, the party knows it is strong and believes that a repeat election could strengthen it even more, so it will not accept any option that is not favourable to it.

On the other hand, the pro-independence parties could fail to achieve a majority for the first time since the start of the *procès-guerrilla movement* or require the support of the extreme right. Therefore, **Junts could try to force a repeat election to** take advantage of the "Puigdemont effect" and the weakness of ERC and the CUP.

It will be the Republicans who hold the key and the pressure, knowing that their electorate is divided between the pro-independence and progressive options. If, as is foreseeable, it obtains a bad result, ERC will be the first interested party in avoiding a repetition of the elections.



SCENARIO 3

Faced with the difficulty of consolidating stable parliamentary majorities that would allow them to govern, the socialists could explore **repeating the formula that allowed them to be invested in the Barcelona City Council**: the Comuns supported Collboni to avoid a right-wing government, while the PP did so to avoid a proindependence government. At the regional level, this scenario is complex, as it **would also need the support of VOX, which could take Comuns out of the equation.** However, in the unlikely event that it were to join, it is an option that will gain strength as the possibility of a repeat election approaches.





SCENARIO 4

Another possible scenario is that of a **pact between the PSC and Junts.** This would be more viable in the event that the more convergent and pragmatic wing of the pro-independence party prevails. However, the prominence of Carles Puigdemont makes this option difficult. It is worth mentioning that this formula - the **sociovergence** - already exists in more than 40 Catalan city councils and has been a frequent alliance in Parliament, as well as being the **favourite option among Catalan businessmen.** Moreover, this coalition **would guarantee the nationalists' support for Pedro Sánchez in Congress.** This option, which was also raised for Barcelona City Council, arouses great media interest, so both Junts and PSC have been asked about it in the campaign and both have ruled it out.

SCENARIO 5

The first calculations on election night itself will be to check whether there is a pro-independence majority in Parliament, something that polls predict may depend on very few votes. However, a **new pact between the pro-independence parties seems complex**, both in terms of parliamentary arithmetic and political will. **Relations between ERC and Junts are not at their best**, and the departure of the latter from the Catalan executive has reinforced the dispute over the leadership of the pro-independence movement. As if that were not enough, a parliamentary majority could depend on aligning two opposing forces: the **anti-capitalists of the CUP and the far-right of Aliança Catalana**.







Although the call for elections came as a surprise to all the parties, most of the list of candidates had already been previously defined or were soon confirmed, with the exception of the PP and the CUP. The result will be an electoral contest almost identical to the previous one: only the anti-capitalists present a different face and the rest of the candidates already faced each other in 2021.

The favourites vying for the presidency would again be Salvador Illa, Pere Aragonès and Carles Puigdemont. Whoever governs, who will have to do so with the (at least external) support of other parliamentary forces, will face **important challenges in the coming years**: the management of a drought that persists over time, relations with the rest of Spain in a *post-Procés* context, and the debate on the financing model. There is also a consensus on the need to make progress in areas such as increasing the supply of housing, the deployment of renewables, improving results in education and investment in infrastructure.

PSC | SALVADOR ILLA

Aim: to win a comfortable victory without an alternative majority

In 2021, in the midst of the pandemic, Pedro Sánchez's bid to make his health minister a candidate proved successful and the **PSC managed to recover from a decade of the worst results** in its history. Now, after a legislature that has served Salvador Illa to consolidate his leadership among the Catalan socialists, all forecasts predict that on 12-M the party will obtain a number of deputies that it has not obtained since the times of Pasqual Maragall or José Montilla. However, the question is whether this will be enough for him to be the next *president* or whether he will see his plans frustrated for the second time in a row.

The context in Catalonia is favourable for Illa: he enjoys the boost from Pedro Sánchez from Moncloa, which could be decisive after the threat of resignation coinciding with the start of the campaign, and the advance at the municipal level of the PSC and its mayors has consolidated him as the leading force, especially in the metropolitan red belt of Barcelona. Moreover, he has the opportunity to capitalise on the useful non-independence vote by being the only candidate from this bloc with a chance of winning the presidency and thus underpinning the change of cycle in Catalan politics after the years of the purchase of masks during the pandemic, and the electoral effects of the amnesty for the PSC (and the PSOE itself) are still unknown.





ESQUERRA REPUBLICANA | PERE ARAGONÈS

Objective: to maintain the Presidency of the Generalitat

Esquerra Republicana arrives at these elections holding **the Presidency** of the Generalitat for the first time since the restoration of democracy, something that the party was confident would give it the necessary boost to consolidate its position as the leading force in the proindependence space. Despite having enjoyed significant institutional power in recent years, the **wear and tear of governing** has been *increasing* and polls show that the Republicans could be falling behind in the electoral race.

The lack of parliamentary support for the Executive, the departure of Junts from the Government and the impossibility of moving forward with the latest budget, together with other problems suffered by the territory - such as the drought - have weakened the leadership of Aragonès, who has opted to present himself to the public as a good manager, with Junqueras in his shadow. Specifically, the *President* sought to articulate an agenda of social government and, in parallel, to advance sovereigntist aspirations with pragmatism, although it seems that this strategy has not convinced his electorate, which has already punished him in the municipal and general elections and could do so again on May 12th. During the pre-campaign, the Government has published reports with proposals for unique financing, a Scottish-style referendum and the expansion of El Prat airport. Its electorate is split down the middle between those who would prefer a progressive government and those who would prefer to re-edit the coalition with Puigdemont.





JUNTS+ | CARLES PUIGDEMONT

Objective: to regain independence leadership and the presidency

With the call for elections, all eyes turned to Waterloo and began to calculate whether, with the deadlines of the Amnesty Law, it would be possible for Carles Puigdemont to return to present himself for an eventual investiture session. The text will be approved and will come into force at the end of May, but he would risk possible detention until the courts decide on his case. For now, he has moved to the south of France to campaign close to Catalan territory.

As in 2017 and 2021, Puigdemont and his team have designed a **campaign focused on exploiting his personal leadership**, and the brand, programme and strategy are more than ever at the service of the candidate. Amid accusations of ERC of squandering the pro-independence majority and threats of withdrawing support in Congress for Pedro Sánchez, Puigdemont appeals to the **idea of the restitution of his presidency** and insists on not giving up "preparing the country in case it is time to exercise unilateralism".

Although the **polls would confirm the "Puigdemont effect"**, they could be affected by minority options such as Aliança Catalana or Alhora, the new party of MEP Clara Ponsatí. Moreover, internal tensions between the pragmatic post-convergence current and the more radical wing have led Puigdemont to draw up a **list marked by the balance** between sectors and the incorporation of independents.



PARTIES AND CANDIDATES how do the other parties get to 12-M?

(PP

Objective: to grow and avoid a pro-sovereignty government

Despite Feijóo's initial doubts about whether Alejandro Fernández should be the PP's candidate, the polls allow them to be optimistic: the PP would be the party that would grow the most. Among other factors, due to the poor result of 2021, when they were on the verge of being extraparliamentary, with only 3 deputies. Now, it could multiply its presence to 13 or 14 seats thanks to the absorption of Ciutadans and the stagnation of VOX. Thus, it wants to regain the role of the Spanish right-wing party that it had held until a decade ago. Although in the campaign it has directed darts against Salvador Illa, it could facilitate his investiture to avoid a pro-independence government.

Objective: to enter the Government

The alternative left has been characterised by the high loyalty of its electorate. However, although an agenda marked by social and environmental (rather than national) issues could provide an opportunity, polls predict a challenge for Jéssica Albiach, backed by Yolanda Díaz and Ada Colau. One of the unknowns is whether the electorate will blame the Comuns for the collapse of the budget and the consequent early call for a referendum because of their refusal to accept the Hard Rock casino in Tarragona. Moreover, this is the first time Podemos has not supported the coalition.

They aspire to maintain their 8 deputies and enter the Government hand in hand with the PSC and/or ERC. This could facilitate a parallel negotiation with Collboni to enter the Barcelona government and thus participate simultaneously in the most important national, regional and local executives.

Ciutadans

Objective: not to disappear from Parliament

Forecasts agree that it **will not reach the 3% needed to achieve representation**, in line with its progressive disappearance from Spanish politics. However, its candidate, Carlos Carrizosa, aspires to mitigate the **drain of votes to PSC, PP and VOX** with an electoral campaign against Sánchez and Puigdemont.

VOX

Objective: to consolidate in Catalonia

In 2021, VOX burst into Parliament with 11 seats as a result of a highly polarised national debate. Now the political cycle is changing, but the party **needs** to consolidate its position in Catalonia, albeit somewhat downwardly. This would not only support its strategy in the autonomous community, but would also be a relief for Santiago Abascal's strategy at the national level.

Ignacio Garriga maintains his **total rejection of the** *'procés'*, in which he also considers the PSC to be complicit, but is focusing a large part of the campaign on **denouncing illegal immigration**, which he links to insecurity, with a discourse that appeals to the 'impact on the services that Catalans receive'. For this reason, VOX is campaigning in lowerincome neighbourhoods and is competing with the PP for the young Spanish vote.

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Aim: to be key to a pro-independence government

Despite a good result in 2021 (9 seats) and being the key to the investiture of Pere Aragonès, **the anti-capitalists are at a low point**. Since the last elections, the party has disappeared from Congress and has been progressively losing power and influence, especially as a result of the end of the *pro-Catalonia government*. **Internal disputes led the party to consider its refoundation**, but it has not yet been able to complete it. Its electorate is the most undecided at this point in time, so **its outcome is an unknown quantity**.

Aliança Catalana

Objective: to achieve representation in Parliament

The novelty in Parliament could be the **entry of the pro-Independence right-wing** Aliança Catalana, led by **Sílvia Orriols**, mayor of Ripoll (Girona). With the same slogan as VOX, but in Catalan ("Salvem Catalunya"), it focuses on attacking immigration and also tries to attract voters from the **most conservative and nationalist sector of Junts**, which is conditioning the political agenda. They could be represented in both the Barcelona and Girona constituencies.



29 APRIL, THE MOST INTENSE DATE

With the arrival of the elections, X has seen an increase in political activity thanks to the **more than 13,000 users** who have published **235,000 tweets** in the last month. During the period analysed, there has been an increasing trend in the number of publications mentioning any of the candidates, with the **highest peak** occurring **on April 29th**, **the day of Pedro Sánchez's appearance in which he** confirmed that he would continue as leader of the government.

PUIGDEMONT AND ORRIOLS, MOST MENTIONED



Total mentions in X

Carles Puigdemont has become the candidate who has generated the most conversation on the networks, with a significant difference in mentions (+38%) with respect to the second place, occupied by **Sílvia Orriols**.

The conversation generated in the mentions as a whole focuses, for the most part, on the current government's handling of the amnesty, on support for Puigdemont's leadership as a representative figure in the run-up to the elections, on immigration, and on concern about the cuts.

The media that have published most about the elections in X are La Vanguardia, El Periódico and TV3.

Methodology

Analysis of 235,047 public publications on Twitter mentioning the candidates' official accounts between 02/04/2024 and 01/05/2024, excluding retweets and replies. The information was analysed using the Brandwatch active listening tool.

GARRIGA AND ARAGONÈS, THE MOST ACTIVE



The activity generated by the candidates was not proportional to the mentions received. The most active were **Ignacio Garriga** (mainly through retweets and replies), **Pere Aragonès** (generating his own content and at the same time interacting with external content) and **Carlos Carrizosa**. The activity of the PP, Comuns Sumar, Junts per Catalunya and CUP candidates has been residual.

Only one of the candidates is among the users who have generated the most *engagement* on X: Salvador Illa. Other notable opinion leaders have been Josep Costa (former Junts) or Albano-Dante Fachín (former Podemos, now pro-independence).



The Aliança Catalana *hashtag* has been the most used in networks, a fact that also coincides with the most shared link: the website of the **electoral programme of Aliança Catalana** has appeared in 92 tweets and has generated 1,245 retweets.

ORRIOLS' SLOGAN SWEEPS IN X



The timetable for the first steps after 12M, within the framework of the 14th legislature, for the formation of a new government includes crucially important dates such as the following:



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