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29 November: The Risk of an Early Election

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The decision to call an early general election for 29 November has surprised many analysts and much of Spanish society. After three and a half years in office, Pedro Sánchez has opted for a high-risk decision at a time marked by parliamentary deadlock, polarisation, corruption cases, the migration crisis in Ceuta and a new wave of social mobilisation around housing.

Maricarmen’s eviction may invite conclusions that are too hasty. The government had already weathered periods of greater tension: the Koldo case, investigations involving the prime minister’s wife and brother, and the inability to pass a budget because of its complex relationship with the PNV and Junts. Foreign-policy decisions—Palestine, the change of position on Western Sahara and the relationship with Morocco—have further increased tensions. The early election should therefore be understood as a calculated political gamble rather than a simple reaction to a single episode.

From Two-Party Politics to Bloc Politics

Pedro Sánchez became prime minister after the motion of no confidence against Mariano Rajoy on 1 June 2018. That government had one of the smallest parliamentary bases in Spain’s democratic history and depended on constant negotiation with regionalist parties. The rejection of the 2019 budget precipitated the first early election.

The 2019 elections brought the rapid disintegration of the traditional two-party system to an end and opened an era of bloc politics. Vox’s entry into Parliament, the rise and subsequent collapse of Ciudadanos, and the Socialist Party’s victory transformed the system. Following the repeat election in November, Sánchez formed a coalition government after a narrow investiture vote and secured enough parliamentary support to remain in office for almost four years.

In 2023, poor Socialist results in municipal and regional elections led to another early election. Although the People’s Party won more seats, Sánchez remained in power thanks to a parliamentary majority in which Junts proved decisive. The result once again strengthened the People’s Party and the Socialists while weakening Vox and Sumar, but it did not restore the stability of the old two-party system. Instead, it consolidated two blocs dependent on smaller partners with veto power.

A Parliamentary Majority That Is Difficult to Govern

The legislature that began in 2023 was born with a contradiction. The left interpreted Sánchez's investiture as the continuation of a progressive agenda; a significant part of the right regarded it as a government dependent on separatist or regionalist forces. That divide shaped the entire legislature.

Difficulties in passing reforms, responding to the housing crisis and agreeing a new budget gradually revealed a deepening legislative deadlock. Junts showed that it could withdraw its support in decisive votes, and the government eventually ruled out presenting a budget before 2027. At the same time, the Spanish economy produced positive indicators, including record Social Security enrolment and growth above that of much of the European Union, driven partly by post-pandemic tourism and population growth.

The government's problem was therefore not only economic. It was one of political capacity: sustaining a left-wing coalition while negotiating every initiative with territorial parties whose outlooks and interests differed widely.

Radicalisation and the Youth Vote

Social media has meanwhile become a central arena of political mobilisation. Vox has consolidated an especially loyal young electorate and has made issues such as immigration and housing central to its message. Politicians and commentators associated with the right have found in digital formats a direct route to a generation defined by frustration, insecurity and a lack of prospects.

Right-of-centre civil society sees an opportunity to achieve an exceptional electoral majority. Think tanks, associations and local organisations are trying to mobilise young people and groups that feel neglected by institutions. Polls placing the combined right close to a majority of the popular vote have reinforced those expectations.

Fragmentation also affects the left. Some younger voters are beginning to consider alternatives to the Socialist Party because of a perception of inaction after eight years in government. Gabriel Rufián, Adelante Andalucía, the BNG, Bildu and a revitalised Podemos hope to channel that dissatisfaction through different territorial, social and identity-based appeals. The result is a politically more plural Spain, but also a more polarised one.

Corruption, Ceuta and the Maricarmen Effect

Corruption cases have eroded the promise of democratic renewal with which the Socialist Party came to power in 2018. The Koldo case and the situation of former minister José Luis Ábalos have damaged the party's image. Investigations involving members of Sánchez's family have also dominated public debate, although some voters distrust proceedings initiated by politically motivated private prosecutions. Corruption has once again become a driver of voting behaviour.

The migration crisis in Ceuta added another source of pressure. The sudden mass arrival of migrants across the Spanish-Moroccan border, the slow institutional response and doubts about Morocco's actions strengthened criticism of the government's foreign policy. Demonstrations defending Ceuta's Spanish identity mobilised the right and deepened distrust of the bilateral relationship with Rabat.

The episode that accelerated the electoral timetable, however, was what became known as the Maricarmen effect. The eviction of an 87-year-old woman by an investment fund caused a strong public reaction, particularly on the left. Tenants' organisations and youth movements announced demonstrations and a possible strike, evoking a dynamic similar to that of the 15-M movement.

The government responded with two housing decrees intended to strengthen tenant protection and make it easier for landlords to place properties on the market. Both were defeated because of a lack of support from Junts and doubts within Coalición Canaria and the PNV. Following that legislative defeat, Sánchez called the election for 29 November.

The Logic of the Early Election

The decision appears to reflect a strategic assessment: the Socialist Party may believe there is still room to rebuild a left-wing majority if it can place housing at the centre of the campaign and harness social mobilisation. The proposed Broad Front seeks to bring together disenchanted progressive voters and prevent abstention from cementing a victory for the right.

The gamble nevertheless carries an obvious risk. Polls place the Socialist Party behind the People's Party and show its potential partners divided. The prime minister is relying on a short campaign to mobilise the left before the government's decline becomes more pronounced, while hoping that tensions between the People's Party and Vox prevent the right from presenting itself as a stable bloc.

Three Governing Scenarios

A Large People's Party–Vox Majority

The first scenario is a broad right-wing majority. Vox could approach 20 per cent of the vote and double its representation, while the People's Party would maintain or slightly improve its position. A combined total close to three fifths of Congress would open the way to constitutional reforms under Article 167 and would mark a far-reaching shift in domestic and foreign policy. Vox's entry into government would be difficult to avoid.

A Narrow Majority and a Crisis in the People's Party

The second scenario is a right-wing victory smaller than expected. If the Socialist Party held its ground or even overtook the People's Party, Alberto Núñez Feijóo's leadership could be called into question. A strengthened Vox would impose tougher conditions for a coalition, and the centre-right could enter a crisis leading to deadlock or another election. This is probably the hypothesis on which Sánchez's gamble rests, although it depends on too many variables moving simultaneously.

A Campaign Turnaround and a Left-Wing Majority

The third scenario would be a comeback built around housing, youth mobilisation and a plurinational left. Current polls assign it a low probability, but campaigns can change turnout and concentrate tactical voting. The Socialist Party's objective would be to preserve its central position while parties to its left and territorial parties provide the votes needed for a majority.

What Each Political Force Has at Stake

- **Vox** will focus much of its campaign on immigration, housing and a firmer policy towards Morocco. It will seek to turn its growth into a decisive role within a right-wing government.
- **The Broad Front and territorial left-wing parties** will place housing, social protection and a foreign policy critical of the United States and supportive of Palestine at the centre of their platform.
- **The Socialist Party** will seek to reinforce Sánchez's legitimacy, present its agenda as a European barrier against the right and defend the continuity of the progressive project.
- **The People's Party** will make its rejection of "Sanchismo", corruption and the promise of institutional change the pillars of its campaign. It must clearly finish first if Feijóo is to preserve his leadership.
- **Nationalist parties** will fight to retain their influence under pressure from new territorial alternatives and the wear caused by their support for

the government.

Conclusion

The election on 29 November may be the most important since the breakdown of Spain’s two-party system in 2015. It will determine not only who governs, but also whether Spain consolidates a more radicalised form of bloc politics, returns to a system dominated by large parties, or enters a new phase of territorial and ideological fragmentation.

Sánchez has chosen the moment and accepted the risk. The right enters the contest with an advantage, but remains divided over the scope of change and the role Vox should play. The left is weakened, although it has a cause—housing—capable of mobilising voters who had drifted away. Both blocs appear ready to stake everything, leaving little space for moderation.

Spanish society has changed since 2023. The vote on 29 November will show whether that change produces a new stable majority or another legislature of deadlock.