

The French political crisis is unlikely to end quickly, and could have major consequences beyond France. Not only has it exposed the fragility of President Emmanuel Macron's victory in 2017, but also a structural crisis of representative democracy: it has many characteristics that are similar to what has been observed in other Western democracies, except for the uniquely French tradition of insurgency (which sometimes makes France a bellwether).

Much has already been said on the profile of the Yellow Vests Movements - Gilets Jaunes - and what makes many of them similar to Trump or Brexit supporters: the left-behind of economic and cultural globalisation reject traditional politicians, because they have lost confidence in a representative democracy that they perceive as systematically rejecting their views. Some date that divorce from the Maastricht Treaty, which was approved by the slimmest of majorities. The geographic base of the Gilets Jaunes, being rural France and declining small towns, is similar to the old mining basins of the US or the UK that support Trump or Brexit. Their socioeconomic profile - largely white, middle-aged, struggling to stay in the middle class - is also comparable. The methods of mobilisation, which eschew traditional means and rely on social media, account for the suddenness of a movement that has spread like wildfire. They may also facilitate various manipulations, as fake news (many outlandish, like the rumor that the French constitution has been abrogated, making Macron's authority illegitimate!) proliferate. It seems likely that external actors, from Trump to Putin, are now trying to exploit, and in some cases to instigate, trouble. The fact that some of the fake news are part of a broader campaign point in that direction. For instance, the campaign against the migration Pacte de Marrakech, alleging that Europe will be forced to accept 480 million migrants, is getting traction on French social media. It would however be a mistake to assume that the movement does not have deep French roots.

What is most striking is the visceral hatred that Macron has generated among a significant minority of French people, which is comparable to the hatred of Hillary Clinton in the US. It was worrying to watch on television an ultra-left member of the National Assembly talking about death threats against the President without condemning them clearly. Macron can blame himself for some of the anger: as a keen observer of the French scene informed me, Macron has been agitating a red flag in front of the bull ever since he was elected. He has made multiple insensitive comments that have infuriated his adversaries and puzzled his supporters. Having surrounded himself with people who are often too much like him, he at times seemed to have lost the pulse of the country. That stands in stark contrast with the way he barnstormed his way to the presidency, marginalising his opponents and quickly establishing a personal rapport with the French. There may lie the seeds of his present loss of support (31 percent of favorable opinions, a figure that improved by 2 percent in recent weeks, and is still better than Hollande, who went down to 24 percent). Having embraced the Bonapartist tradition of French politics, he has ignored intermediate structures and does not have any buffer to protect him from public anger. The fact that Macron was elected as an anti-system candidate compounds the problem: many French people, including those who did not vote for him and are now among the Gilets Jaunes, retained the hope that his disruptive conquest of power would translate into disruptive politics. They now see him as a normaliser of France who will make the country more unequal.

Many fear that Macron's reforms, modestly chipping away at the French welfare state, will put an end to a "French exception" that they believe is worth fighting for. At a time when some assume that the tide of free market policies is beginning to ebb, opposing a long overdue attempt to bring France closer to other comparable market economies no longer looks like a lost battle. What started as a protest against a very specific policy (increase of the diesel tax, to end a French policy of encouraging the French to buy diesel cars) has thus morphed into a broader challenge to the establishment.

Dragoman

The catch-all nature of the Gilets Jaunes movement replicates two years later - but in the opposite direction - the République En Marche movement of Macron: that makes its political categorisation difficult. Just as Macron claimed that he was neither left nor right, the Gilets Jaunes claim to be non-political. But an analysis of social media nevertheless shows that some of the most active militants are known for their extreme right views, reflected in anti-Semitic and anti-Muslim declarations: it is plausible that many of the Gilets Jaunes are supporters of Le Pen. The quasi absence of militants of African or Arab origin and the slogans heard confirm the influence of the extreme right. But there are also extreme left activists. The most worrying feature of recent events is that among the demonstrators arrested for acts of violence, a number are middle aged French people who did not have a past of violence, and were probably not involved in politics before. The movement clearly goes beyond the extreme right and the extreme left.

The distinction made between peaceful Gilets Jaunes and violent casseurs seems less and less relevant. Mob dynamics are volatile and dangerous: videos of demonstrations show continuity between the two categories, as Gilets Jaunes watch passively while violent acts are committed, sometimes joining the fray, and then return to a position of observers. A friend of mine who was stopped at a road block told me how he was forced to put on a yellow vest, and how a woman in a luxury car at the same roadblock was threatened in a very aggressive way until she put on a yellow vest. Intimidation also affects those Gilets Jaunes who appeared willing to engage with the government. They have refused to engage after receiving death threats. The fact that the prefecture of Puy en Velay, a sleepy town in central France, was attacked is another indication of the increasingly violent nature of the movement.

In that context, French authorities are worried that the Gilets Jaunes, with violent demonstrations every Saturday, could create a longer-term crisis that will weaken French democracy and would eventually have a serious economic impact. There is however hope that the significant package of redistributive measures announced by Macron and the rejection of violence by a silent majority of French will allow the government to regain control of the situation, isolating the most extreme elements. The terrorist attack in Strasbourg on 11 December may also help restore a sense of national unity. The latest demonstrations show a significant decrease in the number of participants.

Comparisons have been made with the 1968 movement. There are at least three major differences:

- In a context of European fiscal constraints, the margin for manoeuvring by the government is much smaller than fifty years ago. After the concessions already made by Macron and the package of new measures he has announced, the French budget deficit will again be above the 3 percent agreed at the EU level. Much will depend on how Germany is willing to support some flexibility with France, while not sending the wrong message to an Italian government that has chosen a policy of brinkmanship on budgetary issues.
- In 1968, unions were stronger and helped resolve the crisis. However, the movement has not triggered a wave of strikes, as was the case in 1968, and the fact that the more moderate union in France, the CFDT, is now the number one union is an encouraging sign that suggests that French labour relations may become less confrontational.
- De Gaulle had the support of a well-organised party, which made it possible for the Gaullists to mount a massive demonstration of support at the end of May 1968, setting the stage for a sweeping electoral victory a few weeks later. Macron supporters may not have that capacity.

Dragoman

Macron thus finds himself in a weaker, but not desperate position. His positioning “neither from the right nor from the left”, once an asset, now isolates him. The moderate wing of the left that embraced him in 2017 is disappointed that he has edged towards the right and as such gives him lukewarm support. On the right, most leaders are cynically trying to benefit from the present turmoil. Afraid of losing supporters to Le Pen, the centre-right has so far avoided distancing itself from the Gilets Jaunes. It plays a double game, simultaneously not condemning the Gilets Jaunes for the violence, and criticising the government for not stopping the violence. The centre-left, represented by the old socialist party, has been squeezed. Its more radical wing has joined the extreme left of La France Insoumise, a French equivalent of Corbyn’s Labour, and is trying to benefit from the Gilets Jaunes, playing the same double game as the right. That leaves a socialist party that is the shadow of itself. That configuration makes a re-set of Macron’s presidency more difficult. On the right, politicians like Alain Juppé could support him if the crisis deepens, but the image of renewal would be gone. On the left, the last Prime Minister of Hollande, the socialist Bernard Cazeneuve, could be an option. He was respected as the Minister of Interior and is quietly positioning himself as a potential recourse. The package of measures announced by Macron is, however, sufficiently significant to send a strong signal: that after 18 months, during which Macron focused on wealth creation, he is now giving as much importance to solidarity. That should help him with centre left and green politicians, but he must not lose those who supported him because of his reform agenda. The fact that he is not reinstating the wealth tax signals that he is well aware of the need to maintain the momentum of market-oriented reforms.

The European Parliament elections in May will be an interesting test in that regard, although much can happen between now and then (Brexit in March, deepening US political crisis, unforeseen events in the Russian periphery or the Middle East, resumed tensions in the Korean peninsula, terrorist attacks...). 2019 is indeed likely to be a year of political black swans. At this stage, opinion polls should not be read as a forecast of the EU Parliament elections but they give an interesting perspective - relatively positive for Macron - on the present stage of public opinion in France. An Ipsos poll puts his movement as first with 21 percent (whether or not there is a Gilets Jaunes – GJ- list), well ahead of Le Pen’s extreme right (at 17 percent if there is no GJ list, 14 percent with a GJ list). The Greens would be third, with 14 percent if there is no GJ list, 13 percent otherwise. The Gilets Jaunes, if they were to put forward a list, are credited with only 12 percent of the vote. The traditional conservative right gets 12.5 percent with no GJ list, 11 percent otherwise. The radical left gets 12 percent with no GJ list, 9 percent otherwise. The balance of votes goes to small parties from the left and right. The Socialist party finds itself with the extraordinary low scores of 4 percent if there is no GJ list, and 3 percent if there is one! This makes for a very fragmented and unpredictable political scene: Macron and Greens attract roughly 35 percent of the vote (maybe closer to 40 percent if one includes the centre left parties), while Le Pen, the Extreme left and other small extreme right and extreme left parties also get around 40 percent. Much therefore depends on the traditional right, with some 12.5 percent of voting intentions. In France as in Germany, traditional parties are challenged by new forces, with the Greens benefiting from the changing mood and the social-democrats being the big losers. The difference is that the traditional centre right remains the centre of gravity in German politics, while it has lost that position in France.

Beyond those electoral considerations, the French crisis points to deeper issues that are not uniquely French. The public mood has shifted since the time when Blair was promoting the Third Way in Britain, and Schröder was introducing reforms in Germany. The French have heard of the growing inequality in the UK, and while some may envy the economic success of Germany, they also know about the increasing number of so called “working poor”. Moreover, the argument made earlier this year by Macron in a Davos speech, that the opening of economies to global competition will be complemented by international agreements that prevent a race to the bottom on taxes and welfare, lacks credibility. Even within the European Union, efforts to reach common understandings on tax and welfare issues have so far been

Dragoman

unsuccessful. Hence the appeal of Corbyn in the UK, and the hijacking of a part of the traditional base of the left by the right and the extreme right, which also exploit the cultural fear of a borderless world.

In the longer term, the crisis raises questions on the functioning of democracy in the age of social media. Social media help consolidate closed communities that rally around myths and fake news, fracturing political communities. That is particularly dangerous at a time when authoritarian leaders, from Putin to Trump, have understood that it is much easier to exploit one's competitor's weaknesses than to build one's own strengths. As geopolitical competition intensifies, and political communities are under stress for a variety of reasons, we can expect that attempts to sow discord and polarisation will multiply.



Jean-Marie Guéhenno is a former French diplomat. Among his various positions, he served as President and CEO of the International Crisis Group (2014-2017), Chairman of the Henri Dunant Centre for Humanitarian Dialogue (2010-2012), and United Nations Under-Secretary-General for Peacekeeping Operations (2000-2008). Before joining the United Nations, Jean-Marie served as Director of Policy Planning in the French Ministry of Foreign Affairs (1989-1993).