TRUTH
IN POLLING

FINAL PUBLIC REPORT

EUROPE ELECTS: TRUTH IN POLLING

Final Public Report

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FOREWORD

In 2021, Sebastian Kurz resigned as Austrian Chancellor following allegations that he had orchestrated the misuse of public funds to finance politically motivated and occasionally manipulated opinion polling data. These polls had played a pivotal role in shaping his image as a political wunderkind, ultimately helping him become the world's youngest head of government at the time, at the age of 31. Over several years, the public had been misled by fabricated opinion polling results.

The manipulation was subtle enough to avoid detection through quantitative methodological scrutiny alone. Kurz's collaborators were seasoned professionals who ensured that the distortions remained within plausible margins, thereby evading suspicion from statisticians. Instead, it was the work of investigative journalists that uncovered incriminating communication between the Kurz team and the pollster, revealing that deliberate, albeit marginal, manipulations were likely used to generate eye-catching headlines and favourable narratives.

At Europe Elects, we have been monitoring political polling daily across Europe for over a decade. Based on this experience, we believe the Kurz affair is unlikely to be an isolated case. While the majority of established polling institutes adhere to scientific standards, it is undeniable that questionable polling data is pervasive, and has seeped into the work of reputable journalists and academics, who often lack the experience, skills, or resources to conduct a thorough investigation into organisations outside of their immediate expertise.

This reality highlights the need for a systematic investigation of the more than 500 organisations active in political polling across the continent. The findings are now publicly accessible through the newly created database accompanying this report, a unique resource made possible by the expertise of our 37 permanent country investigators.

The results of this investigation have opened numerous avenues for future research and led to a series of recommendations, which are outlined in this report. Additionally, we provide an overview of the key patterns and trends identified during our inquiry. The project aims to contribute to the fight against misinformation and serves as a tool to promote a more informed and democratic public discourse across Europe.

Tobias Gerhard Schminke

CEO Europe Elects UG (haftungsbeschränkt)   Oberroßbach, 1 June 2025

ABOUT EUROPE ELECTS AND THE EUROPEAN MEDIA INFORMATION FUND

Founded initially as a volunteer initiative in 2014, Europe Elects is today an established organisation widely recognised for promoting democratic governance and civic participation across Europe. The platform undertakes a wide range of activities to achieve this goal, primarily related to the collection, verification, and contextualisation of political polling data.

Polling data aggregation and analysis

Europe Elects aggregates political polling and other electoral data from across Europe and makes it available freely to the public in various formats, including maps, charts, and databases. It also analyses this data to produce insights into public opinion and electoral trends. Europe Elects' polling data aggregation and analysis is used by journalists, researchers, politicians, and citizens alike to understand public opinion and make informed decisions.

Election and polling real-time coverage

Reaching an audience of several million monthly impressions via social media, Europe Elects has collected and contextualised election result data for the European Parliament, national parliaments, Presidential, regional, and even local elections. Its live coverage includes results, exit polls, analysis, and infographics. As we address a European audience and aim to enable everyone to better understand the political positions of the parties, we make European Parliament group affiliations as transparent as party membership information. This lowers the bar for an interested reader in Portugal to understand the political framework of Poland, while remaining grounded in objective group membership based on political ideologies.

European Parliament and European Council tracking and seat projections

Europe Elects uses polling data to develop election projections for various elections across Europe. Its projections have been praised for their accuracy and have been featured in major media outlets, including The Financial Times and Euronews. Europe Elects' election projections are a valuable tool for understanding the likely outcome of an election and its implications for the future of European politics. Additionally, we track the shifts in political leaders within the European Council by European Parliament group, which serves as an indicator of the ideological direction of the member states of the European Union.

All resources are utilised by schools, universities, and civic organisations to educate individuals about the significance of voting and participating in the democratic process.

The Calouste Gulbenkian Foundation and the European University Institute manage the European Media and Information Fund (EMIF), which financed the Truth in Polling project. The goal of EMIF is to support projects that serve the public interest, with a focus on initiatives aimed at combating disinformation through investigative journalism.

AUTHORS AND PRINCIPAL INVESTIGATORS

Jakub Rogowiecki

Jakub Rogowiecki holds a Master's degree in Political Economy of Europe from the London School of Economics and Political Science (LSE). He has been involved with Europe Elects since 2020, specialising in the Central and Eastern Europe region, with a focus on the Republic of Moldova and Poland.

As co-leader, he has been primarily responsible for conceptualising and implementing the Truth in Polling project, which involves creating and managing an online database of pollster assessments, as well as producing reports.
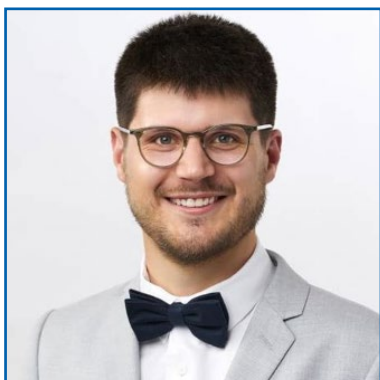
Tobias Gerhard Schminke

Tobias Gerhard Schminke is the team coordinator, founder, and CEO of Europe Elects. He is currently a doctoral researcher at Dalhousie University in Halifax, Canada. His research focuses on electoral democracy, political behaviour, and political financing.

In the context of the Truth in Polling project, he supported the project manager as co-leader during the conceptual stages of the project, conducted data analysis, and contributed as a co-author to this report. He was also involved in research and project coordination.

Mihail Murgashanski

Mihail Murgashanski holds a Master of Laws degree from the Ss. Cyril and Methodius University in Skopje. He has been involved with Europe Elects since 2020, specialising in the South-Eastern region, with a focus on Montenegro, Serbia and North Macedonia.

As a project assistant, he has been primarily responsible for implementing the research methodology, which involved coordinating both online and in-person investigations, as well as monitoring and leading data collection efforts.

Julius Lehtinen

Julius Lehtinen has been the editor-in-chief of Europe Elects for over five years. In addition to coordinating the editorial desk of Europe Elects' long-form publications, he manages the technical aspects of over 40 country polling averages for Europe Elects. He specialises in Finnish and Greenlandic politics for the project, focusing on these two countries. Julius works as a doctoral researcher at the University of Helsinki, Finland. His research focuses on comparative analysis of European electoral systems and survey research.

Concerning the Truth in Polling project, Julius was a driving force in developing the standardised mechanism to fulfil the presented objective, which enabled the rigorous comparative analysis of pollsters' accuracy across Europe. He also participated in research within the context of the project.

BACKGROUND

Context and Problem Statement

Representative opinion polling—defined as surveys that capture the attitudes of a sample population, which, through their methodological design, reflect the general mood of the total population—has powerful implications for democratic rule. Polls, when conducted according to scientific standards, serve as a democratic feedback mechanism. In some instances, they can also act as a check on electoral irregularities and misconduct. Additionally, ample evidence suggests that political leaders and elites regularly review and adjust their decisions to accommodate better the public mood captured in opinion polls (Soroka & Wlezien, 2010). These reverberations do not only relate to policy but also personnel: intra-party dynamics are likely influenced by opinion polls, with implications for the re-election or replacement of party leaders (Ennser-Jedenastik & Müller, 2015). Besides, the results of public opinion influence not only the politically powerful but also the broader public. For example, the spiral of silence refers to the mass psychological phenomenon in which some voters tend not to express their genuine political choices, but rather what they perceive as the prevailing political consensus (Noelle-Neumann, 1980). In summary, widely disseminated opinion polling has a significant impact on political decision-making and shaping of political preferences.

In 2024, Europe Elects recorded several thousand polls regarding party preference, which are often widely reported in the media. They are a regular occurrence in almost all independent states and dependent territories. Media companies in some countries, such as Germany, Italy, and the United Kingdom, conduct party preference polling several times a week throughout the legislative period. In some states, party preference polling is rare due to factors such as a lack of funding or an authoritarian political environment that does not permit science-based opinion polling.

While no evidence suggests that opinion polling is used widely for immoral goals, some examples of bad-faith actors exist, some of whom have manipulated polls to sway elite and public opinion in their favour. One of the most prominent examples is the one that led to the resignation of then-Chancellor and European Council member Sebastian Kurz. Kurz allegedly oversaw the misuse of public money to fund politically motivated and occasionally manipulated opinion polls, which were then published in the *Österreich* newspaper. Polls are commonly thought to have contributed to Kurz's rapid rise to party leadership and, subsequently, to the chancellery (Klenk, 2021). Manipulation is trumped by fabrication, which does not stop some European media from reporting the data (see, for instance, the PrognosUmfrage case in our database). The examples highlight the public's (occasional) inability to differentiate between trustworthy and less trustworthy polls, partly due to a lack of knowledge about the various polling firms, their reputations and basic statistical considerations guiding the polls. This is especially the case when journalists or researchers encounter polls in foreign contexts.

Purpose of the Study

Given these challenges, the role of poll aggregators has become increasingly vital. They provide academics, journalists, and other information gatekeepers with curated assess to polling data, helping to mitigate the risks posed by unreliable or opaque information sources. Recognising the urgent need for greater transparency and public understanding of opinion polls, Europe Elects has taken steps to sys-

tematise and share its expertise on specific organisations of interest, polling institutes and organisations pretending to be polling institutes, in a publicly accessible and thoroughly documented format.

The *2024/2025 Europe Elects: Truth in Polling* report and its associated database, available at https://europeelects.eu/europe-elects-truth-in-polling, aim to address this gap. The project, made possible by the European Media and Information Fund (EMIF), introduces a new pillar of online-based fact-checking, allowing every European citizen and stakeholder to access an overview of all relevant organisations in the field of political polling.

Roadmap

This report is divided into three main sections. First, it presents a methodology, highlighting that Europe Elects did not only rely on conventional approaches to assess pollster reliability, but also innovative ones. Conventional approaches include, for instance, the measurement of polling accuracy or the review of data tables, although the latter are not commonly available outside of Western Europe. Innovative approaches included semi-structured interviews with organisations of interest and questionnaires sent to these organisations, requesting the disclosure of potential conflicts of interest. These findings were triangulated through an intensive review of the primary literature, including a review of media and non-governmental reports. Second, we then present descriptive data results for more than 500 organisations in the field of political polling, spanning 50 European countries. Detailed results per organisation of interest are listed under https://europeelects.eu/europe-elects-truth-in-polling. Third, we present avenues for future research, providing lessons learnt from this important project.

METHODOLOGY

Overview

This cross-sectional study involves two elements: a database of organisations of interest—defined as organisations claiming to conduct political polling—and a report that summarises general trends. The database should not only serve as a tool for future comparative analysis but also enable journalists, researchers, and the wider public to rapidly access information even from contexts unfamiliar to them. To achieve this goal, our team—comprising one project manager, one project assistant, and 37 country experts who have been permanently involved in the work of Europe Elects—investigated organisations that published political polling between 2019 and 2024. The research spanned 50 independent countries, including all members of the European Political Community, as well as Belarus, the Holy See (Vatican City State), and the Russian Federation[1]. Data collection lasted from June 2024 to June 2025.

The project employs a transparent methodology that combines qualitative and quantitative methods to identify and assess organisations that have recently published data on partisan voting intentions. Data collection methods and assessment categories were reviewed by researchers and academics, some of whom are currently engaged with Europe Elects as contributors, and others who were independent external experts. We chose this approach to ensure that the project was conducted in a rigorous and transparent manner, and that the findings are credible and trustworthy.

Europe Elects' country investigators were asked to compile a list of all organisations of interest. These organisations include pollsters captured in the Europe Elects database, which generally features widely recognized pollsters that published voting intention data between 2019 and 2024. Additionally, country investigators were asked to review media reports, statements by political actors, and commentary from industry associations about organisations claiming to conduct polling outside of the Europe Elects database.

The country investigators were able to draw on their extensive experience, as well as that of their peers, many of whom have been monitoring the polling industry and elections in their respective countries of expertise for years on a near-daily basis. In the past, they had to justify their choices regarding the inclusion or exclusion of pollsters in Europe Elects' widely consumed social media coverage to the public or to Europe Elects, or they reviewed information on organisations of interest submitted by the public or their peers, providing them with a solid background in preparation for this study. Years of experience have also contributed to understanding pollster performance from a quantitative perspective, for instance, when comparing pollster performances relative to election results.

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1 Albania, Andorra, Armenia, Austria, Azerbaijan, Belarus, Belgium, Bosnia and Herzegovina, Bulgaria, Croatia, Cyprus, Czechia, Denmark, Estonia, Finland, France, Georgia, Germany, Greece, Holy See (Vatican City State), Hungary, Iceland, Ireland, Italy, Kosovo, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Moldova, Monaco, Montenegro, Netherlands, North Macedonia, Norway, Poland, Portugal, Romania, Russian Federation, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Türkiye, United Kingdom, Ukraine.

Categories of Pollster Identification and Assessment

Following numerous consultations with two political scientists, two industry actors, and 37 Europe Elects country investigators, this project settled on 12 categories to identify and assess organisations of interest.

Pollster Identity

1. **Name:** This category records the self-identified name used by the organisation claiming to conduct political polling through representative surveys.

2. **Registration:** This category records whether a given entity is legally registered with the state and, if so, for how long. If an organisation has been registered for a longer time, it is more likely to have accumulated experience and is more likely to be seen as credible among partner organisations and clients.

3. **Key People:** This section highlights the individuals responsible for the research, or other professionals involved in the organisation conducting it. This section can help make transparent whether key individuals have conflicting interests (e.g., partisan affiliations) which can hamper science-based work.

4. **Official website:** Having a website is an essential aspect of commitment to transparency. It allows consumers to access key information related to an entity, including, but not limited to, the aspects we focus on in our study.

5. **Address:** The existence of a physical address is not only a legal requirement for an entity to operate, but it is also a location where one should expect to find professionals capable of representing their entity. Naturally, it is also an ongoing expense, meaning the enterprise must maintain financial stability in the long term. Thus, having a location indicates longevity, either intended or already achieved, in the context of which the pollster's track record and reputation can be assessed.

6. **Email address:** This indicates whether the organisation provides an email address for contacting them. Some may only provide a web form, which cannot be captured in the database.

Quantitative Assessment

7. **Accuracy:** The accuracy of pollsters can be measured in several ways. In the context of the Truth in Polling project, we modified the methodology used by the now-defunct US-based poll aggregator *FiveThirtyEight* to better reflect the European pluralist political landscape. The method outlines that a pollster's accuracy is measured "by the average error and average bias of a pollster's polls, [quantifying] error by calculating how close a pollster's surveys land to actual election results, adjusting for how difficult each contest is to poll. Bias is the error that accounts for whether a pollster systematically overestimates Republicans or Democrats." Europe's multiparty democracy and relatively lower volume of political opinion polling make it a complex task to account for bias by political party, which is why this project focuses on how closely a pollster's survey aligns with the final election result at an aggregate level, rather than per party. To accomplish this, we calculated the aggregated divergence between polling and election results for a selected national parliamentary or European Parliament election for which the organisation of interest had conducted a poll.

To estimate the total sum, we calculated the difference between the election result and the polling result for each political party that won parliamentary representation, disregarding directionality. We decided against using the mean absolute error per party because opting for the total absolute error and disregarding the number of parties in averaged computations enables more robust tentative comparison between countries with differing party structures. This is chiefly because the average error of polling in systems with many parties is decreased by relatively more accurate polling with lower percentages, which is a statistical by-product of how standard deviation is calculated.

$$\text{Absolute Total Raw Error} = \sum_{(i=1)}^{n} |\text{Poll}_1 - \text{Result}_1|$$

In this formula, "Poll_1" represents the polling result per party i in the most recent national parliamentary or European Parliament election. "Result_1" records the party's result per election. The absolute numbers of the divergences are then summed up to get the absolute total error. Recording this figure for multiple elections was unfortunately beyond the scope of this research due to the larger number of organisations of interest recorded (503). Still, it remains a desirable task for future research.

To illustrate the mechanics better, if Party A was polled to get 40% but received 37%, the deviation is three percentage points. If Party B was polled at 30% but actually received 32%, the deviation is two percentage points. In total, this is 3 + 2 = 5 percentage points of absolute total error for the pollster.

Qualitative Assessment

8. **Methodology:** This category provides high-level information on how a given organisation claims to conduct its polls. While it goes beyond the scope of this report to review each methodology in greater detail, it is best practice to publish basic information about how data is collected and/or processed for the sake of transparency.

9. **Potential Conflict of Interest:** This category indicates whether there are reasonable allegations of a conflict of interest. The category is particularly sensitive, and several precautions were taken to mitigate unwarranted reputational loss. For one, it is essential to note that no claim is listed without a reputable source, such as well-known newspapers, peer-reviewed academic journals, official comments from professional groups, and other recognised authorities. During our investigation, we remained open to feedback from the entities listed and allowed them to respond to the accusations through the Google form. A potential conflict of interest does not necessarily equate to a confirmed conflict of interest.

10. **Recognition by the country's professional association:** This category lists membership in profes-

sional associations for market research. Through membership, organisations often subscribe to a set of values and standards, though enforcement by the professional organisation is regularly weak or non-existent. An example of such an association is ESOMAR, an international organisation that establishes ethical guidelines for market, opinion, and social research, offering support, networking opportunities, and professional development for professionals in data and insights.

Miscellaneous

11. **Note:** This is an undefined category to allow our team to highlight any aspects that stand out about them and are not covered by the prior categories.

12. **Presence in the Europe Elects polling coverage:** This category indicates whether Europe Elects includes the organisation in its polling databases and social media coverage, reflecting its overall credibility.

Where an organisation of interest is not listed in the database, it was not assessed. This can mean that it was founded after the project at hand concluded, or that it is an organisation that has been widely regarded as unreliable in the field of political opinion polling to the degree that it is not widely reported.

Data Collection and Assessment Team

The team responsible for evaluating the organisations of interest bridges a total of 37 Europe Elects country investigators, many of whom have worked on polling and election data aggregation for several years. Data collection involved at least three principal dimensions.

First, all polling organisations listed in the *Europe Elects: Truth in Polling* database were contacted at least once via email that included a Google form to provide information about their organisation. The Google form listed questions targeting the categories of identification and assessment. This allowed the organisations to share their perspective on their performance. Country experts often reached out to organisations of interest individually to overcome language barriers posed by the Google form, which was only provided in English.

Second, the project manager, the project assistant, and other selected Europe Elects team members conducted in-person and online interviews, including with representatives from organisations in North Macedonia, Sweden, and the United Kingdom. Furthermore, on-site observations and in-person investigations were conducted to verify information on the ground, for instance with organisations of interest in Germany, Slovenia, and Türkiye. In some cases, address data was corroborated using Google Street View imagery. Cases for in-person investigations were selected either because the team lacked sufficient information or because they presented an extreme case (either a significant degree of lack of credibility or a significant degree of credibility).

Third, country investigators conducted an extensive review of the primary literature, examining media reports and publications by political actors or professional associations to collect data.

The project manager and project assistant were responsible for reviewing and standardising the information, monitoring intra-coder reliability and consistency across country investigators. The database can be found at: https://europeelects.eu/europe-elects-truth-in-polling/.

RESULTS

This project, conducted between June 2024 and June 2025, provides a comprehensive examination of the public opinion polling landscape across Europe. Through direct investigation and sustained research efforts, the Europe Elects team actively engaged in identifying polling actors, assessing practices, and documenting the broader conditions that influence polling activity across national contexts. Europe Elects investigated the field of polling in a total of 50 countries, identifying 503 organisations that publish political polling.

Table 1: Number of organisations investigated per country

COUNTRY	NUMBER	COUNTRY	NUMBER
Albania	7	Latvia	6
Andorra	3	Liechtenstein	1
Armenia	8	Lithuania	6
Austria	15	Luxembourg	2
Azerbaijan	7	Malta	5
Belarus	4	Moldova	5
Belgium	5	Montenegro	8
Bosnia and Herzegovina	2	Netherlands	5
Bulgaria	11	North Macedonia	24
Croatia	4	Norway	8
Cyprus	13	Poland	18
Czechia	11	Portugal	10
Denmark	5	Romania	18
Estonia	3	Russian Federation	9
Finland	4	Serbia	11
France	15	Slovakia	13
Georgia	7	Slovenia	5
Germany	17	Spain	28
Greece	18	Sweden	9
Hungary	14	Switzerland	10
Iceland	5	Türkiye	48
Ireland	6	Ukraine	12
Italy	26	UK	26
Kosovo	6		

The number of organisations of interest varied significantly by country, with the most extensive case being that of Türkiye, which had 48 organisations of interest. In terms of quantity, the country is followed by two EU member states—Spain and Italy, with 28 and 26 organisations of interest, respectively. Setting aside countries where we were unable to identify entities conducting party polling (Monaco, San Marino, and the Vatican), averaging at nine per country.

Figure 1: Number of organisations investigated per country

Organisations identified in the political polling market

This map shows the number of organisations that published political polls as defined in the Truth in Polling project in recent years.

Legend: 0-10, 11-20, 21-30, 31-40, 41-50
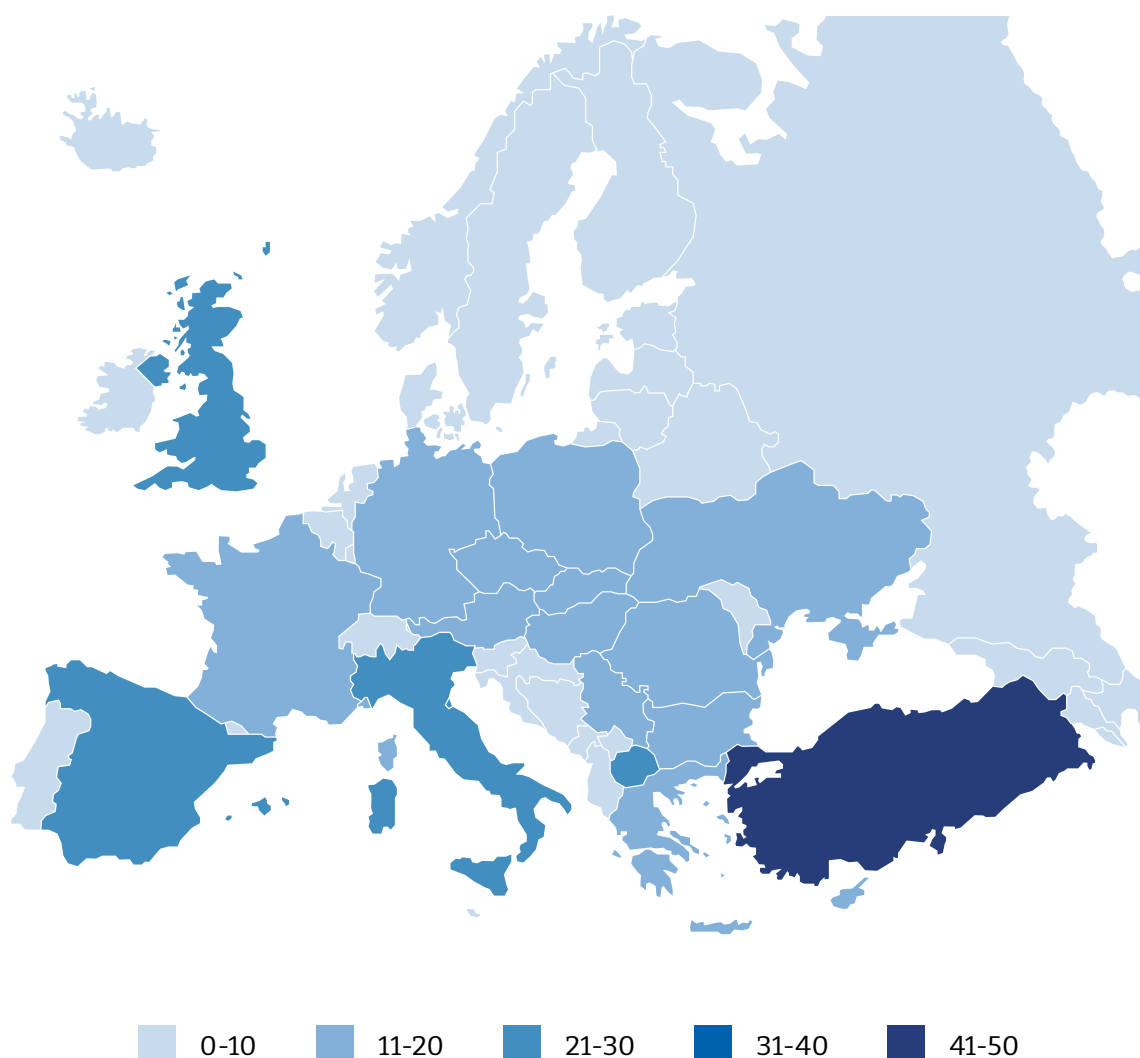
When it comes to registration dates, the data show remarkable diversity, with nine out of ten organisations of interest having a public registration date. The oldest registered organisations involved in contemporary voting intention polling are Chatham House, founded in 1920, Ifop, founded in 1938, and GfK in the Netherlands, founded in 1934. A total of five organisations were registered before 1940. Four additional organisations were registered in the 1940s, and one was registered in the 1950s. 13 organisations were registered in the 1960s. Twenty-six organisations were founded in the 1970s. Twenty-seven organisations were registered in the 1980s. One hundred three organisations investigated were registered in the 1990s. Another 114 organisations were registered in the 2000s. The 2010s saw the registration of another 112 organisations that, during the investigation's time frame, published voting intention opinion polls. 31 organisations were registered after 2020. This means that about a quarter of the organisations have an institutional experience of less than 15 years, speaking to the volatility in the market.

A registration date was identified for 445 (88.47%) organisations. 58 (11.53%) organisations were either never registered or the date of registration could not be determined, raising questions around their credibility. The review of registration dates revealed that rebranding, as well as de-registration and re-registration of organisations active in the polling field, is a common practice, leading to difficulties in tracing accountability.

Most organisations active in the polling industry document at least some aspects of their methodology, which in itself shows a remarkable diversity involving, for instance, Computer-Assisted Telephone Interview (CATI), Computer-Assisted Web Interview (CAWI), and Computer-Assisted Personal Interview (CAPI). In 40 cases, equivalent to eight per cent of the total caseload, country investigators did not find any publicly documented information about the methodology. Eleven of these cases were in Türkiye, another six were in North Macedonia, with the remaining cases spread across the continent.

Positive examples at the organisational level include Ipsos France, Kantar Public Belgium, and I&O Research from the Netherlands, which exemplify best practices by consistently publishing comprehensive methodological information and detailed data tables, allowing for a more thorough quantitative examination of the methodology. This includes sample sizes, fieldwork dates, data collection modes, weighting variables, and treatment of undecided voters. Their adherence to professional standards and memberships in research associations further reinforce their commitment to transparency.

On the other hand, Avangarde in Romania frequently omits clear explanations of sampling procedures and weighting strategies. The organisation has faced scrutiny for overestimating the Social Democratic Party (PSD) in various elections, including the 2020 legislative race, raising questions about potential partisan bias or unrepresentative sampling. At the same time, OfiD in Serbia and McLaughlin & Associates in North Macedonia offer polling figures without disclosing even the most basic methodological elements, such as sample structure, data collection mode, or margin of error.

A common methodological issue across various countries is the lack of clarity in handling undecided or non-responding voters, which can significantly influence headline figures. Additionally, inconsistencies in reporting margins of error and the absence of information about poll commissioning entities further complicate the assessment of polling data.

In 50 cases, representing 9.94% of the total caseload, no key people from the organisation could be identified. Türkiye stands out with nine cases. North Macedonia (six) and Spain (five) follow.

Of the 503 organisations of interest, 384 (76.34%) presented a poll we could use within the framework of our methodology before a national parliament or European Parliament election to determine accuracy. One organisation presented a seat projection, not a popular vote result. The mean Absolute Total Raw Error was 13.0 percentage points. The lowest Absolute Total Raw Error were 1.5 (Sotomo, Switzerland), 2.5 (Allensbach, Germany), and 2.7 (OpinionPlus, Switzerland). The fact that two Swiss companies rank among the top three may be related to the larger-than-average sample size of Swiss voting intention polling and the low levels of party system volatility in the country (but see Tresch et al. (2023)), highlighting that cross-country comparisons based on Absolute Total Raw Error need to take into account country-specific variance when making cross-national comparisons.

Table 2: Lowest Absolute Total Raw Error rate per organization and country

ORGANISATION	COUNTRY	ABSOLUTE TOTAL RAW ERROR
Sotomo	Switzerland	1.5
Allensbach	Germany	2.5
OpinionPlus	Switzerland	2.7
MISCO	Malta	2.8
21 Kutatóközpont	Hungary	3.0
OGB (Ogólnopolska Grupa Badawcza) / IBSP (Instytut Badań Spraw Publicznych)	Poland	3.0
Odoxa	France	3.0
LeeWas	Switzerland	3.3
SOCIS	Ukraine	3.6

CSPS (Centrul pentru Studii Politice și Sociologice) from Romania had the highest absolute error (60.0), even though the fieldwork period was just days before the European election day. Notably, Marius Lulea, the owner of the organisation, was also the first vice president of a political party. The database displays documented evidence of a potential conflict of interest. The Absolute Total Raw Error of MPG - Gallup International in Armenia was 45.1, but the 2021 national parliament election was marked by significant party system volatility when compared to the previous election. This makes it difficult for pollsters to capture the public mood, which explains why two of the top ten organisations with the highest error rates come from Armenia (out of a total of three pollsters conducting polling before the 2021 national parliamentary election). Cyprus's organisation 'Interview' also had a high Absolute Total Raw Error (44.1), but the poll was conducted several weeks before the election. The European election in the country was marked by significant volatility in the party system compared to the previous European election. Four of the top ten most significant errors were from organisations in Cyprus. The examples highlight that, from a cross-national perspective, purely quantitative measures may fall short, but they also reveal interesting cases.

Table 3: Highest Absolute Total Raw Error rate per organisation and country

ORGANISATION	COUNTRY	ABSOLUTE TOTAL RAW ERROR
CSPS (Centrul pentru Studii Politice și Sociologice)	Romania	60.0
MPG - Gallup International	Armenia	45.1
Interview	Cyprus	44.1
Phoenix Research	Slovakia	43.2
CRRC	Georgia	41.0
CRRC - "Caucasus Research Resource Center" Think Tank	Armenia	40.0
Republikon	Hungary	39.0
Prime	Cyprus	33.9
BCS (Biroul de Cercetări Sociale)	Romania	32.3

The team documented 92 cases of potential conflicts of interest, representing 18.29% of the total. This finding suggests that organisations with documented potential conflicts of interest are not isolated or exceptional but instead form a significant minority. Given that almost every fifth pollster fell into this category, it underlines the importance of independent investigation and monitoring.

Some selected cases illustrate how conflicts of interest play out. In Hungary, for example, the pollster Nézőpont Intézet received substantial government funding in 2023, including a 2.4 billion forint (62 904 000 euros) contract for advisory services until 2026, which has led critiques to highlight the organisation's close alignment with the ruling Fidesz party, raising concerns about the impartiality of its polling results. In Poland, Social Changes, a pollster connected to the conservative portal wPolityce.pl, has drawn scrutiny for consistently publishing results favourable to the Law and Justice (PiS) party, leading to questions about editorial and political influence (Pacewicz, 2023). In Spain, the public research centre CIS (Centro de Investigaciones Sociológicas) has faced criticism for perceived proximity to the governing party and for consistently publishing results that appear favourable to the incumbent government. While CIS is a state-funded body and not a private firm, the concerns over its objectivity have drawn attention within Spain's political landscape and raised broader questions about the role of publicly funded institutions in electoral polling (Europa Press, 2024). Meanwhile, in Austria, the polling firm Research Affairs has been at the centre of a major political scandal involving allegations of manipulated polls tied to public funding and the ÖVP party, led by former Chancellor Sebastian Kurz.

Table 4: Number of potential conflicts of interest per country

COUNTRY	NUMBER	COUNTRY	NUMBER
Albania	1	Latvia	0
Andorra	2	Liechtenstein	0
Armenia	0	Lithuania	0
Austria	4	Luxembourg	0
Azerbaijan	0	Malta	1
Belarus	3	Moldova	1
Belgium	0	Montenegro	1
Bosnia and Herzegovina	0	Netherlands	1
Bulgaria	0	North Macedonia	7
Croatia	1	Norway	0
Cyprus	1	Poland	3
Czechia	2	Portugal	0
Denmark	0	Romania	8
Estonia	0	Russian Federation	4
Finland	0	Serbia	2
France	1	Slovakia	3
Georgia	1	Slovenia	0
Germany	3	Spain	2
Greece	1	Sweden	4
Hungary	10	Switzerland	2
Iceland	2	Türkiye	7
Ireland	1	Ukraine	3
Italy	3	UK	4
Kosovo	2		

The country experts found that 281 (55.86%) organisations of interest were organised in professional associations. 222 (44.14%) organisations were either confirmed not to be organised in a professional association, or there was no information available on the matter. 185 (36.78%) organisations had an affiliation with ESOMAR, the global professional association for market research and insights. Only eight organisations were part of the World Association for Public Opinion Research.

In 441 (87.67%) cases, Europe Elects was able to identify the address of the organisations of interest. In one particular case, no address was identified, and the coder noted that this may be related to foreign agent laws implemented in authoritarian regimes. Where pollsters seek to operate independently in authoritarian regimes they risk legal action. As a result, some pollsters may intentionally limit their exposure by operating informally, which can lead to not having a fixed address.

In 439 (87.28%) cases, Europe Elects was able to identify an email address. In 469 (93.24%) cases, coders were able to identify the website of the pollster; however, 34 (6.76%) cases presented organisations that only had a social media account or were only mentioned in the publication where the voting intention polling was published.

The free-text field section available for our researchers highlights that approximately 100 pollsters have been inactive in recent years in terms of political opinion polling. Other country investigators noted that some organisations only pose as polling organisations (e.g., "PrognosUmfragen" in Germany).

The note section further highlights that some pollster brands are registered in multiple countries or are active as part of an international market research company under multiple umbrella organisations, which lends credibility to their partner organisations. For instance, Ipsos Group S.A., initially founded in France, is registered in several countries under the same name, allotting a degree of credibility to the respective national organisation. Other organisations of interest conduct surveys and are active in some countries, but their headquarters are in other countries. For instance, Chatham House is a United Kingdom-based polling organisation, primarily active in Belarus in terms of polling voting intentions.

Some organisations can be highlighted because they did not provide information through the Google form, nor did they display information publicly, nor was the country correspondent able to identify the information through direct communication with the organisation. This includes 'RDI' from Ukraine, which, aside from a Facebook page, lacks any public details about its registration, key personnel, or ownership structure, leaving no basis for reliable verification.

While Türkiye is the country with the most organisations claiming to publish political polling, it is also one of the most opaque contexts when it comes to reviewing the quality of related polls, with little industrial oversight and critical review of pollsters by the media, as well as significant political influence in the field of polling. A total of nine organisations presenting themselves as pollsters in Türkiye did not provide information on their registration year, key people involved, or their membership in professional associations, highlighting the lack of transparency in the polling industry in the country. Political polls are often simply published on social media, with little to no information on their methodology. The accounts publishing these polls are associated with personal accounts representing organisations, rather than social media accounts associated with pollsters. The personalities are often closely tied to the political elite, while some of the organisations they claim to represent lack a website. Yet, the results published on these accounts, which often vary significantly in line with the political preferences of key people involved, are widely referenced in the Turkish media, which themselves are often aligned with powerful economic or political elites. In aggregation, this raises questions about the credibility and reliability of polls published by organisations of interest in Türkiye. While these trends are prevalent in Türkiye, they also exist in other countries, such as Hungary or some states in the Western Balkans.

The response rate to the proposed Google form sent to all organisations was 33 (6.56%). This figure does not account for significant contact between country experts and organisations of interest.

CONCLUSION

Discussion of Results

The findings point to considerable variation across the continent. While some countries benefit from an active and visible polling sector, supported by professional norms and public interest, others exhibit minimal levels of polling, with only a few organisations consistently conducting polling or publishing data. In several contexts, polling is constrained by political, economic, or institutional factors that undermine both its presence and credibility.

While political polling in Europe overall seems reliable, this project reveals recurring patterns across multiple European countries that raise questions about the impartiality of a significant minority of polling firms (or organisations of interest), often concentrated in semi-authoritarian countries. One common theme is the presence of financial or organisational ties between organisations of interest and political entities, such as direct employment, ownership links, or consultancy roles with parties or candidates. In several cases, individuals in leadership positions at polling firms have either held public office or run as candidates.

Another frequent issue is the provision of polling services to governments or state institutions without clear public disclosure of contracts, which may foster perceptions of bias, mainly when such data is used in campaign contexts. Additionally, some polling companies operate as part of larger media or business conglomerates with known editorial or political stances, which can subtly influence the framing of surveys and interpretation of results. In countries with weaker regulatory environments, transparency around methodologies, funding sources, or client lists is often lacking, further compounding the risk of biased polling. These common factors—political entanglements, opaque funding, and lack of methodological transparency—pose a threat to the credibility of polling as a democratic tool and raise the need for greater oversight and standardised disclosure practices across Europe.

These findings around potential conflicts of interest illustrate how pollsters' affiliations—whether through direct political work, financial dependence, or integration with partisan media—risk eroding public trust. They also demonstrate the diversity of challenges across different democratic systems, reinforcing the need for Europe-wide standards on transparency, independence, and disclosure.

Contributions

This report and the associated database can be used to inform editorial decisions and coverage, help highlight reliable pollsters and identify potential biases. We encourage other media organisations, watchdogs, and academic institutions to adopt similar benchmarks using this open framework, enabling a broader and more consistent evaluation of polling credibility in Europe. By sharing this resource and our methodology, Europe Elects hopes to contribute to greater transparency, accountability, and informed public discourse around polling and democratic engagement.

In-person interviews revealed that organisations which were cooperative and showed no 'red flags' in the criteria of identification and evaluation welcomed this project as valuable and necessary, highlighting the lack of transparency in the field.

Limitations

We are confident that this study serves as a comprehensive effort in the field of cross-country pollster evaluation. Yet, it must be acknowledged that several limitations were faced during our research, primarily related to its scope.

The longevity and strength of democratic institutions have a significant impact on the accessibility of crucial information. Generally speaking, firms operating in Western and Northern Europe operate within a system that imposes well-defined expectations in the context of transparency and accountability. Likewise, emerging democracies, environments associated with democratic backsliding, or actual authoritarian regimes, not only make such assessments more time-consuming but, in some cases, create barriers that could not be overcome in the context of this report. Assessing the accuracy of polling figures relative to those manufactured during farcical elections, such as those in Belarus and the Russian Federation, would serve as nothing more than legitimising those elections. In such political climates, investigative journalism and those conducting it are actively suppressed, which is a hardship related to the qualitative portion of our research, with its reliance on whistleblowers on the ground. In case of hybrid regimes, this adversity has its parallel in lower levels of civic engagement and political disinterest, even if not based on active suppression.

Last but not least, we recognise that the landscape of political pollsters in Europe is an ever-changing one. Every week, new polls are released. Every month, new elections take place. Every year, European pollsters acquire new clients. Taking that into account, our investigation is merely a snapshot of the industry at the time of our research.

Potential for Future Research

As described in the introduction to this report, polling is deeply political. Pollsters not only capture political opinion but also influence it through the release of voting intention data. However, the influence of pollsters has been widely overlooked by investigative journalism and academics alike. This report is only the first step in bridging this knowledge gap. We hope that the present research, both in terms of its added value and identified limitations, will inspire other researchers to further critically examine the polling industry in Europe.

One avenue for potential future research is a more thorough quantitative assessment of political polling in Europe. In the distinctly different political system and context of the United States, the now-defunct poll aggregator *FiveThirtyEight* measured accuracy based on polls dating back to 1998. This more comprehensive approach to measuring polling accuracy is still lacking in Europe. While Europe Elects is one of the few outlets reviewing pollster performance after elections regularly through publications on its website and social media, there is no standardised cross-national framework that accommodates longitudinal assessments. Cross-national comparisons are also warranted because the polling industry is increasingly global and transnational, as demonstrated by the case of Atlas Intel, a Brazil-based pollster that has conducted voting intention polling in France and Romania.

Another avenue for research, either by investigative journalists or an academic research project, would be country-level case studies or case studies based on the newly developed database. The advantage of the existing database is that it unveils problematic patterns in the polling industry per country. Hunga-

ry or the Russian Federation, for example, show high degrees of potential conflict of interest. As such, it is essential to understand the dynamics of how influential actors interact with pollsters and to what degree the pollsters are dependent organisations rather than independent, science-based actors. These individual case studies are essential because only if the local dynamics of pollsters as political actors are well-understood can state or civil society act against their influence.

Political influence is often easier to track than private large-capital influence. Where a partisan actor owns a pollster in an environment of a free press, the relationship between party and pollster can be made transparent. This is particularly challenging when pollsters are financially dependent on one or a few large private actors, which may use their leverage over the pollster to exert political influence without being formally affiliated with a political party. Future research could review the financial records of pollsters to identify actors with significant financial interests. However, a finding of this report was that this information is not systematically available. Not all types of companies are required to provide their financial statements, and where they do, these may not be detailed enough for a meaningful analysis. The in-person interviews revealed that even pollsters cooperating with Europe Elects during this investigation were hesitant in revealing this information.

Recommendations: Call to Action

This report revealed a list of short-comings in the polling industry in Europe. This project hence proposes five calls to action.

1. This report found that the polling industry does not provide sufficient methodological detail. The variations in information about conducted polling underscore the need for unified European standards mandating minimum methodological disclosures. Establishing transparent framework on sample structures, weighting criteria, data collection methods, treatment of non-responses, and disclosure of sponsoring entities would enhance the comparability and reliability of polling data. The Europe Elects project serves as a vital resource in identifying these discrepancies and promoting best practices, thereby fostering greater trust in public opinion research and safeguarding its role in democratic processes.

2. This report found that organisations in the field of polling are highly organised, and as such, being part of a professional organisation can signal trust, but only if the professional associations are actively and autonomously involved in the oversight and review of methodology. We found little evidence that they are performing substantial oversight. Professional associations could be capable of enforcing transparency, making it the industry standard among reputable companies, rather than an afterthought. In countries where professional associations do not yet exist, pollsters should work collaboratively to form one.

3. This report found a significant lack of financial transparency in the polling industry, especially when it comes to non-public sources of funding. Disclosure of financial information should become the industry standard, reducing risk of conflict of interest, whether in the private or public sector.

4. This report calls for media outlets to provide additional context regarding the entity whose poll they are reporting on, based on this and similar evaluations. This is especially the case from polling figures from authoritarian contexts. Far too often, journalists report on figures from, for instance, Russia without questioning the surveying organisation or the chances that survey respondents are willing and able to express their "true" opinion.

5. This report revealed a significant lack of transparency when it comes to political polling in Europe. Whistleblowers can play an important role in highlighting fraudulent practices, necessitating the creation of protections for employees willing to reveal problematic practices to the public, for instance, through strong, industry-wide and transnational labour organisations in the polling industry.

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Note: Sources relating to individual pollster investigations are documented in the publicly available database: https://europeelects.eu/europe-elects-truth-in-polling/