

Senedd 26

CAVENDISH
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Senedd Reform.

Implications for influencing

April 2025

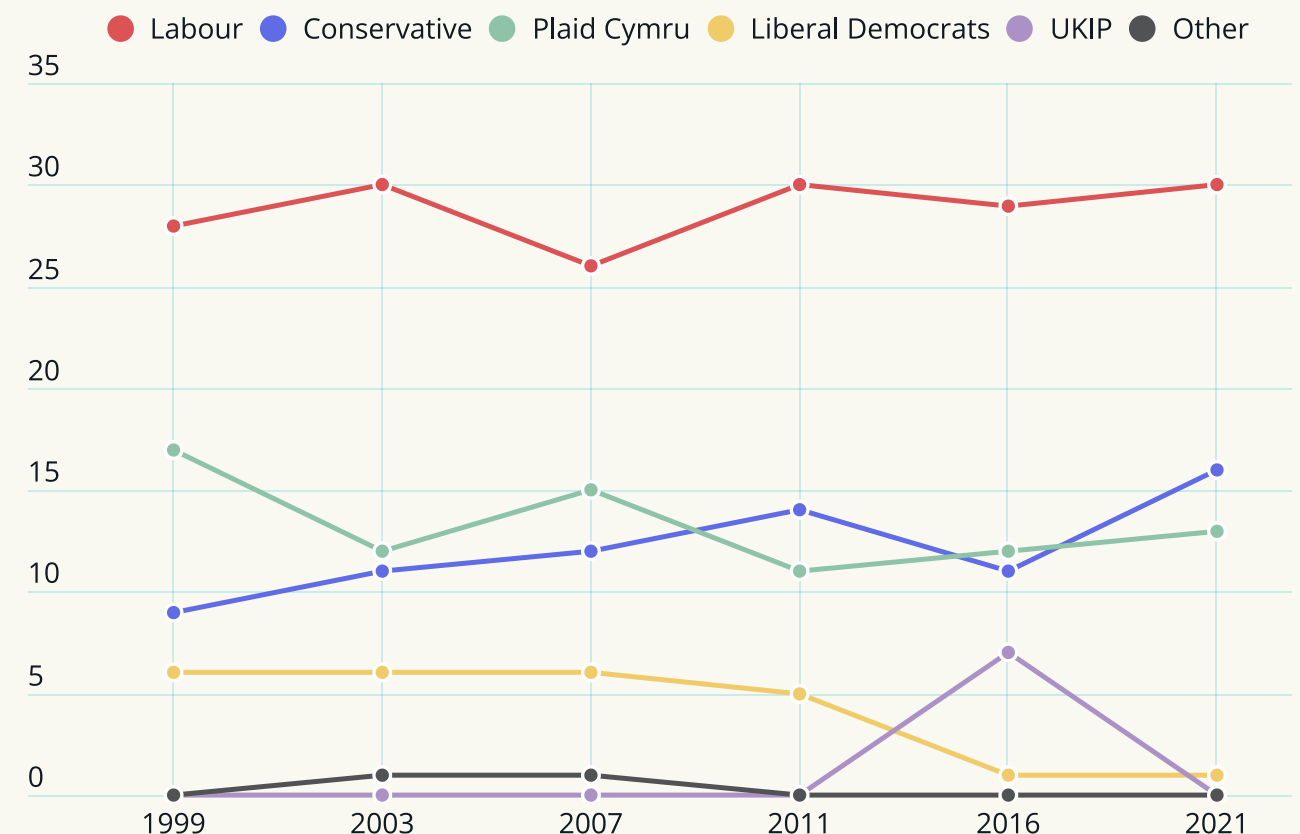
An overview of

Senedd Reform.

At the next election in May 2026, the size of the Senedd will be significantly increased, from 60 members to 96. The members will also be elected using a new proportional system.

The previous system was partially proportional, and no party has won overall control since the establishment of the Senedd in 1999.

Senedd seats by Party.



Whilst we are expecting quite different results to the pattern of the last 25 years, in the main it is the current political context which will deliver those changes, rather than the additional proportionality of the system.



The current Senedd includes 40 constituency seats elected via first-past-the-post, plus 20 top-up seats in five regions, with four seats in each, all elected by Proportional Representation. The new system will comprise 96 members, elected via PR closed lists, across 16 Senedd constituencies, electing six MSs per constituency.

From 2026, Senedd terms will be fixed at four years, so the subsequent Senedd election will be in May 2030.

This means that, in some years, Senedd elections may coincide with UK general or local elections.

D'Hondt System and seat allocation.

Voters only vote once in each seat under the new system, whereas they previously vote twice (one each for the constituency and the region). The D'Hondt method is used to assign the six seats based on the number of votes received, as follows:



In the first round, the party with the **largest number of votes** is allocated the first seat.



In the next round, **each party's votes are divided by the number of seats it has won plus one**. That means if a party wins a seat in the first round, its total votes are divided by two for the next round.



The party with the **highest number wins the next seat**, and so on, until all six seats are allocated.



Increased Senedd Capacity.

A perceived lack of capacity was one of the biggest drivers of Senedd reform. This will mean a change to the Plenary and Committee scrutiny sessions, and potentially an increase in primary legislation.

The increased level of scrutiny should allow for a greater breadth of issues within the

same devolved fields to be debated, and Members could have more freedom to explore issues in further detail.

It also means that larger Senedd Party Leaders could be much more selective in picking their frontbenches. This may produce a broader range of opportunities to engage with Senedd Members.

Larger political groups in the Senedd may also have other implications, potentially making internal groupings more viable, or creating differing party cultures within the Senedd.

There will also be an increase in the number of ministers in the Welsh Government.



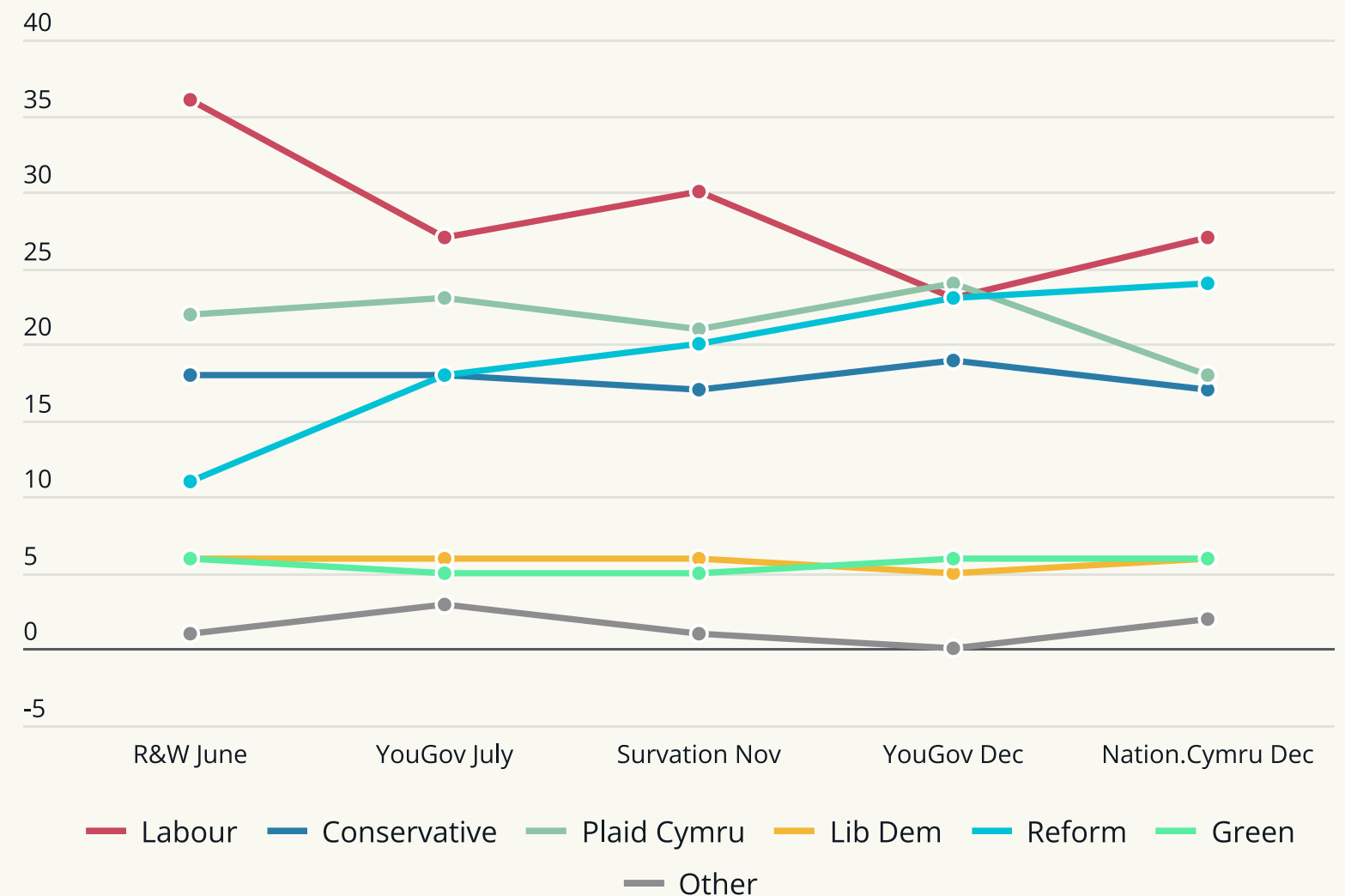
Multi-party Government.

To succeed under this new electoral system, parties will need broad support across Wales. It will effectively reward parties that come first, second and possibly third in many places. Crucially, even if a party has broad support in all parts of Wales, the proportionality of the system also means it will be almost impossible for any party to win a majority.

For the last 25 years, Welsh Labour has polled around 35-40% in Senedd Elections and has been the largest party without winning an overall majority. The two main opposition parties, Plaid Cymru and the Welsh Conservatives have polled around 20-25% each, with some smaller parties also represented. This has allowed Labour either to govern as a minority administration, working with other parties on budgets and legislation on a case-by-case basis, or in more formal agreements and coalitions.

Current polling shows that four parties – Labour, Plaid Cymru, the Conservatives and Reform UK – are almost level. Under the new, more proportional electoral system where the percentage of seats won is more likely to reflect the percentage of votes won, a multi-party coalition is inevitable.

Senedd polling in 2024.



Current polling strongly suggests that the new Welsh Government will likely be some form of Labour-Plaid Cymru coalition. Whilst possible, an alternative government would require Plaid Cymru to work closely with the Conservatives and Reform UK. Modelling the potential results suggests that the Liberal Democrats could win two seats, and the Greens one.

The threshold for winning the last seat in this new system is around 10% in each seat, higher than the average of 8% under the previous system. Smaller parties will need to focus on concentrating their vote in certain seats, as they will fall outside this threshold in many parts of Wales.

An election **too far** for Labour?

Polling over the last 12 months has seen a dramatic fall in Welsh Labour's popularity.

This was partly due to major infighting during Vaughan Gething's short tenure as First Minister. The party still secured 37% of the vote across Wales at the June 2024 General Election, but since then, the party has also lost support UK-wide. Keir Starmer has yet to find a way to maintain support in government after the party swept away the Conservatives, and it is clear that the difficult decisions being made at the start of his term as PM are not helping the polling in Wales.

Labour has been in power in the Senedd for the last 25 years. In order to regain some of its lost support in Wales, the Welsh Labour Government will need to show it can tackle public service delivery issues, such as bringing down NHS waiting times, and provide a real challenge to Reform UK, which has taken a considerable portion of support across Wales.





Challenges for Plaid Cymru.

Current headline polling suggests that Plaid Cymru is set to benefit from a decline in support for Welsh Labour in 2026.

The party's success in 2026 will depend on addressing the inefficiency of its vote and its organisational weakness: Plaid Cymru has historically had limited support outside of rural Welsh-speaking areas in North and West Wales. Progress in challenging Labour in the South Wales Valleys has been variable, and the party has failed to replicate its initial success in 1999 when it won seats like Rhondda, Islwyn and Llanelli.

The new electoral system requires their vote to be more spread out across Wales to win enough seats in each Senedd constituency to become the largest party. This contrasts with Labour, whose voter base remains relatively strong across Wales and should allow them to win at least one or two seats in each of the 16 Senedd constituencies.

Plaid Cymru will need to demonstrate to voters in Labour heartlands that they are the real alternative to Labour. And they will also need to make the most of new campaigning opportunities – ensuring that voters in those seats understand the new voting system to harness the potential support that they have.

The Welsh Conservatives.

For the Welsh Conservatives, this election could represent a perfect storm. Having lost all their MPs in Wales in 2024 and still reeling from the loss of half their councillors in May 2022, their Senedd Members are their only parliamentarians in Wales.

Struggling to recover the ground they lost in the polls, there is a real danger for the Welsh Conservatives that their vote could be squeezed by both Reform UK and Plaid Cymru.

The Welsh Conservatives are, more often than not, polling in fourth place. This would see them lose their role as the official opposition in the Senedd.





The **rise** of Reform UK.

Reform UK will likely win a substantial number of seats across Wales on current polling, though their UK-wide polling does appear to be volatile and linked to the fortunes of their national leader, Nigel Farage.

They have been unable to identify a Welsh leader with anything even close to Farage's appeal, so we would expect to see him playing a prominent role in the Senedd election campaign.

Furthermore, the experience of UKIP members in the 2016-21 Senedd suggests that once elected, the influence of Reform MSs could be limited. The UKIP Group in the 2016-21 Senedd was marred by infighting, defections and bad publicity. It was also clear that UKIP Senedd Members caused significant inter-party tension in a political institution that requires successful cross-party working to achieve policy ambitions.

Party member power.

The new closed list system will mean that each candidate's chances of being elected will depend heavily on how high up they are on their party's list.

Most parties will likely determine the order of their lists via internal elections by party members in each Senedd constituency. This means that the success of prospective candidates will essentially be determined by their popularity in internal elections relative to other local candidates from the same party – after incumbency issues are agreed.

Rank-and-file party members tend to hold more radical positions than the voting public, so candidates and MSs seeking re-election could be incentivised to ensure that their more radical and partisan credentials appeal to party members rather than voters.

This means we could see a more ideologically polarised Senedd with less consensus and collaboration, particularly on significant divides like the constitution, “culture war” issues and fiscal policy. Backbenchers will be particularly susceptible to this.



Preparing for 2026.

The likelihood of an evenly balanced 2026 Senedd Election campaign, the enlargement and reform process, and a large number of retirements mean there will be many new Senedd Members following the election. We would advise starting early in identifying candidates in winnable seats to begin engaging with them. This is a good opportunity to get in there early to build relationships and share your key messages.

Our Senedd Election service will be an excellent way of keeping up to date with key candidate selections, as well as key data and insights during the campaign.

Now is the time for you and your organisation to plan how to engage with the parties, feed into the draft manifestos and influence the policy activity for the next four years.

Cavendish Cymru is here to guide and support you with the influencing process, identify priority engagement across the parties and work on key messaging to maximise your impact. And, given the new electoral reality, working with parties on what they rule out as well as what they promise to do in their manifestos will be more important – as no party will govern alone.

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