

GENERAL ELECTIONS IN GERMANY: A EUROPEAN OUTLOOK

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On 6 November 2024, the so-called German traffic light coalition composed of the Social Democrats (SPD), the Liberals (FDP) and the Greens broke apart after Chancellor Olaf Scholz dismissed the Minister of Financial Affairs, Christian Lindner. Following a vote of confidence in the German Bundestag on 16 December 2024 snap elections were called for 23 February 2025. That was challenging for various reasons.

Political parties had to set up their party programmes and lists in a matter of weeks and they had to campaign over the winter holidays. The election date did not conflict with the Berlin Marathon this time, which had caused severe problems in the 2021 elections, but with the carnival season instead. More importantly, elections took place in a period in which transatlantic relations became more contested than before due to the second Trump administration which took office in January 2025. By mid-February it became clear that the new United States (US) president followed up on his agenda including tariffs and territorial claims as well as starting negotiations with Russia's President Putin on how to put an end to the war in Ukraine without involving Ukraine or the European Union (EU). The speech given by US Vice President J.D. Vance at the Munich Security Conference left no doubt that the value foundation of the transatlantic relationship was entirely shattered. This was yet another urgent wake-up call for the Europeans, who realised that the European security order must now be structured without relying on the US administration. This time EU Member States started to act upon it without any further delay. Those global and European challenges require a functioning German government that can take leadership alongside its European allies.

Consequently, the outcomes of the German elections were highly anticipated. Shortly after the elections, it is difficult to predict the implications for German European policies and politics, because a coalition government has not been formed, yet. However, some reflections might help us to structure our anticipations.

Unexpectedly expected outcomes of the elections

In recent years, opinion polls prior to elections did not necessarily provide a realistic picture of the final results. Surprises on election nights became the rule rather than the exception. Before the general elections in Germany about 40% of the electorate was still undecided. This, however, did not lead to any major surprises on 23 February 2025. The conservative Union of CDU/CSU won 28.8% of the votes and came in first. The Alternative for Germany (AfD) became the second strongest force with 20.8% of the votes followed by the SPD (16.41%) and the Greens (11.61%). The vote share of 8.8% gained by the extreme leftist party Die Linke – although in the realm of the poll's predictions – was one of the surprises of the election night. In the fall of 2024, Die Linke had feared that it would not meet the 5% threshold to enter the Bundestag as polls listed them with about 3% of voter support. Finally, election night became very long for the FDP and the new Alliance Sarah Wagenknecht (BSW) as their results fluctuated at about 5%. In the end, both parties did not make it into parliament, as the FDP gained 4.3% and the BSW 4.97% of the votes. This too, had been predicted by the polls prior to the elections. Hence, one can say that election results were unexpectedly expected.

So much for the good news. Those results reflect several trends and developments that are worth mentioning and assessing. If you would want to identify winners and losers of

the elections, the parties of the so-called democratic centre all lost in the elections while the parties of the extreme sides won. Even the CDU/CSU, which not only became the strongest force but also gained 3.6% compared to the elections in 2021 had no reason to celebrate. This is the second-worst election result in the party's history, while they had aimed for a result well above 30%. All three parties of the former traffic-light coalition were punished by the electorate and had to accept severe losses compared to 2021. The situation with the AfD is quite different. The party has managed to almost double its election results within the past 3.5 years. The same applies to Die Linke.

This reflects a polarisation of German society that builds upon an apparent strong loss of trust in German politics and political institutions. Interestingly enough, the highly politicised debates about the break-up of the so-called *cordon sanitaire vis-à-vis* the AfD by the CDU/CSU in relation to migration policy shortly before the elections neither benefited the AfD nor the CDU/CSU. Instead, Die Linke appears to have attracted a substantial amount of so-called protest voters. Another interesting fact worth mentioning is the voting behaviour of the younger generation. As already highlighted by the results of the European elections in 2024, young people cannot be expected to vote progressively. While this assumption held true for the general elections in 2021, parties like the FDP or the Greens substantially lost young voters' support in 2025. It is Die Linke (25%) and the AfD (21%) that can account for the highest shares of the youth vote.

Another detail worth mentioning is the fact that the seats in the Bundestag gained by the parties of the extreme right and extreme left

add up to 216 out of 630, representing a blocking minority when it comes to constitutional reforms and other decisions requiring a 2/3 majority. This can have implications for reforms of the German debt brake or a potential special asset for supporting Ukraine. Both issues are highly contested among the political parties.

Few coalition options – but if this goes wrong things might get messy

Political parties in Germany are aware of the fact that “neither the world nor Europe are waiting for Germany to form a coalition government”. At least this was widely cited by representatives of different political parties on election night. And rightly so: given the transformation in transatlantic relations and the urgent need to restructure Europe's security order, Germany should not be a bystander but should play an active part. Still, Friedrich Merz and his CDU/CSU are facing the dilemma of wanting to finalise coalition negotiations no later than April while having very few options to choose from. Starting again with the good news: since neither the FDP nor the BSW entered the Bundestag, there is no need to form a three-party[1] coalition. After three and a half years of the traffic-light coalition, there is very little appetite for repeating that kind of exercise. Nevertheless, before the election, possible coalitions like the so-called Germany coalition (CDU/CSU, SPD and FDP) or Kenya coalition (CDU/CSU, SPD and the Greens) had been discussed. Now, Merz has the luxury to opt for a two-party coalition, but not the luxury of being able to pick and choose his preferred version of it. Arithmetically, there are

[1] Given that the CDU and CSU are separate parties one could even speak of a four-party coalition. But since the CDU and CSU form the so-called Union and coordinate their policies, this commentary uses the terms three-party or two-party coalition.

two options to form a coalition either with the SPD or with the AfD. Yet, politically the CDU/CSU have ruled out the latter option. Therefore, the CDU/CSU's only option is to team up with the SPD and form a coalition formerly known as the grand coalition. If negotiations with the SPD prove unsuccessful, there would be practically no alternative for Germany, which of course impacts coalition negotiations. The Social Democrats are not too keen to enter another coalition with the CDU/CSU. Back in 2017, they had already been on their way into the opposition, when the Liberals broke off coalition negotiations with the CDU/CSU and the Greens and there was no alternative to a grand coalition either. Currently, there are voices among Social Democrats that demand to opt for being part of the opposition in the new legislative term. However, the SPD is also aware that options to build alternative coalitions are non-existent. Hence, those voices might only try to raise the price tag of entering a coalition with the CDU/CSU. In any case, coalition negotiations will be anything but easy, because differences in party positions on some of the key challenges ahead do exist.

What does this mean for Europe

As long as there is no coalition and coalition agreement, it will be difficult to evaluate how German European policies are going to be shaped in the years to come. However, even without a finalised coalition agreement some observations based on the party programmes and statements by political stakeholders are possible and might guide expectations.

Starting again on a positive note, it is important to point out that, even though parties of the democratic centre lost in the elections, there still is a solid pro-European bloc of 56.6% in the German Bundestag. However, the AfD, which strongly opposes the EU and hence promotes a destructive Euroscepticism, and Die Linke,

whose Eurosceptic approach is more constructive by demanding a restructuring of the EU including repatriation of competences, add up to almost 30%. As pointed out above, this Eurosceptic bloc has a blocking minority when it comes to constitutional matters and hence some leverage over Germany's European policies.

The party programmes of the CDU/CSU and SPD show sufficient overlaps to promise a constructive European policy. Both parties agree on the need to strengthen the EU's competitiveness and on prioritising deregulation. With an eye on China, both parties acknowledge the rivalry of systems and the need to develop a sovereign China policy, including de-risking. They also agree on establishing a European Defence Union and the need for common defence projects. When it comes to common defence financing, the CDU/CSU are more hesitant, but statements by Merz highlight that this might not be a definite opposition. Additional issue areas with little points of contention are future EU reforms and EU enlargement as well as support to Ukraine. Having said this, the devil lies in the detail. For example, while there is shared support for Ukraine, there is no clear agreement on how to fund this. Additionally, one area of conflict is migration policy. The SPD perceives the CDU/CSU's 'five-point plan', forced into a vote in the German Bundestag prior to the elections, to be in breach of European law and regulations. This issue polarises the two parties because the CDU/CSU accepted the votes of the AfD when it attempted to pass the plan through parliament. The SPD accuses the CDU/CSU of having taken down the *cordon sanitaire* and finds this unacceptable. Representatives from the SPD have requested Friedrich Merz to change his tone and course of action and made this a precondition for successful coalition negotiations.

Both parties are determined to reduce the so-called 'German Vote' in Brussels institutions. In

the past years, Germany had been repeatedly forced to abstain from the voting in the Council because the traffic-light coalition had not been able to find a common position on the matter at hand. Although this is rightly criticised, because it often affected the final stages of decision-making, German Votes have been part of the history of German European politics, and are not an exclusive phenomenon of the traffic-light coalition. Still, the new coalition will be well advised to reform and improve its European policy coordination – even though this is highly unlikely to render German Votes an issue of the past.

A final observation relates to the fact that the CDU/CSU belongs to the European People's Party (EPP). The EPP has a majority in the European Parliament and is represented by 12 Heads of State or Government in the European Council. Additionally, the President of the European Commission belongs not only to the EPP but is a member of the CDU. This means that elections in Germany reflect a general trend within the EU, which is the rise of conservative parties. In some Member States, those conservative governments are either backed by or include right-wing parties. In the European Parliament, majorities have already been formed with the right-wing European Conservatives and Reformists. It remains to be seen how this trend will further develop.

coalition that finds solutions to the most pressing topics. In doing so, they need to reestablish trust in political institutions and overcome polarisation in German society. If they fail to accomplish this, Germany cannot take an active part in restructuring Europe's security order. Additionally, if this new government fails to deliver, prospects for pro-European liberal and progressive parties in the next elections will be very bleak.

Conclusions: A failing government is not an option - neither for Germany nor for Europe

Germany faces the dilemma that the current circumstances require a stable, strong and functioning government as soon as possible, whereas coalition negotiations take time and can only be sped up so much. It will be important that the CDU/CSU and SPD build a

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