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EUROPEAN POLICY ANALYSIS

Germany votes – will its EU policy change?

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Summary

Germany holds its federal election on 23 February 2025, so what is likely to change in the country's EU policies under a new government? More specifically, what can one expect from different governing coalitions in terms of how they would deal with some key EU policies? It is currently difficult to predict which parties will be in government, which parties will be in opposition and which parties will pass the 5% threshold because public opinion is volatile. What is clear, however, is that it will be a difficult task to build a stable government in a fragmented party system after a polarised election campaign.

In this European Policy Analysis, Valentin Kreilinger (SIEPS) examines German EU policy, the challenges for the economy, defence, infrastructure and the green transition in a European context with transatlantic uncertainty. The main political parties' announcements on European affairs lead in different directions for German EU policies under five coalition scenarios. Lengthy exploratory talks and coalition negotiations will take place in spring 2025 before a vote in the Bundestag ultimately determines who will be the next Chancellor.

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The opinions expressed in the publication are those of the author.

Introduction

After less than three years in office, Germany's traffic-light coalition of Social Democrats (SPD), Greens (Alliance 90/The Greens) and Free Democrats (FDP) broke apart on 6 November 2024 when the three parties were unable to plug a hole in the budget for 2025 and Chancellor Olaf Scholz sacked Finance Minister Christian Lindner. Their mandate was marked by Russia's war of aggression against Ukraine, an energy crisis, high inflation and an economic recession. Times have changed dramatically: back on 27 February 2022, Chancellor Olaf Scholz coined the phrase "Zeitenwende" to capture this turning point in the history of Europe (Federal Government 2022a).

Now, after Olaf Scholz lost his vote of confidence in the Bundestag on 16 December 2024, Germany is facing a snap election on 23 February 2025. The outcome of the election is difficult to predict even only two weeks in advance, because the polling numbers are volatile. This is due to an increasingly fragmented party system, which creates even more political uncertainty. The latest addition to the political landscape is Bündnis Sahra Wagenknecht (BSW) with a left-wing populist and pro-Russian platform that reached 5.2% in the European Parliament elections in June 2024 and won more than 10% in regional elections in Eastern Germany in September 2024.

> "European issues have never been an outstanding or highly controversial topic in German federal elections."

European issues have never been an outstanding or highly controversial topic in German federal elections. Rather than moving centre stage as in recent elections in other member states, European issues have not dominated a national electoral campaign, they have only become slightly more important in domestic debates. This is also true for 2025. Although the EU is discussing how it can catch up economically, spend more money and strengthen Europe's own defence, the differences between the mainstream parties remain narrow. The far-right Alternative für Deutschland (AfD), however, challenges the other parties with its anti-EU course, and is the second-largest party in the opinion polls.

The overall question examined in this analysis is: what is likely to change in German EU policies under a new government? In particular, this paper examines how one can expect different governing coalitions to deal with some key EU policies and how the election on 23 February 2025 could therefore affect the Future of Europe.

At this stage, Friedrich Merz, the candidate of the Christian Democratic Union (CDU) and the Bavarian Christian Social Union (CSU), is the frontrunner to become the next Chancellor, while the party of the current Chancellor Olaf Scholz lags in the polls. But the 2021 election showed that the opinion polls can easily shift several percentage points in the weeks to come. After the election, the question as to who is able to build a stable coalition with a majority in the Bundestag will depend on the negotiation skills of the winning candidate and on each party's leadership. In recent years, Germany has become more like its neighbours and particularly more like Scandinavian countries where the party of the Prime Minister often obtains only around 25% of the vote.

This paper proceeds in six steps. Section 1 briefly examines continuity and change in German EU policy. After that, Section 2 describes the German electoral system. The following sections analyse the challenges for the Future of Europe (Section 3) and the dividing lines between Germany's political parties in European and international affairs with a particular emphasis on their electoral manifestos for the 2025 election (Section 4). Finally, Section 5 explores different coalition scenarios and their impact on EU affairs before Section 6 briefly discusses the leadership role expected from a German Chancellor at the EU level.

1. German EU policy: Continuity and change

The EU policies of the reunified Germany have been marked by continuity and change. The successive Merkel governments between 2005 and 2021 were often criticised for not developing a vision for the Future of Europe. However, despite promising EU policy objectives in its coalition agreement (Kreilinger 2022), the government led by Olaf Scholz did not take decisive positions in its EU policy from 2021 to 2024 either.

Besides the personality and leadership style of the next Chancellor and how he or she interacts with other European leaders, the exact composition of the government matters. The SPD itself has been in government since 1998 except for the period from 2009 to 2013 when the Liberals were the junior coalition partner of Merkel's CDU/CSU, which governed with the Social Democrats in a Grand coalition from 2005 to 2009 and again from 2013 to 2021.

In the euro crisis, Germany was described as a "reluctant hegemon" (Bulmer and Paterson 2013) whose pre-eminence was largely economic, under domestic constraints and politically contested – even in this area. But there is remarkable continuity from the beginnings of Germany's post-war European policy to the present that has helped the country manage and overcome the different crises of the EU. In the COVID-19 crisis, Germany abandoned ordoliberal principles and accepted joint debt, which can be explained by the nature of the pandemic, Germany's long-term support for European integration and its overarching interest in maintaining the cohesion and staging a recovery of the EU-27.

> "[...] the traffic-light coalition disturbed the well-oiled and usually quite predictable consensus-oriented legislative machinery in the EU's two-chamber system."

During the three years of the traffic-light coalition, a situation known as the "German vote", which refers to the German government abstaining from decisions in the Council (Wimmel 2024), occurred more often than in the past (Zimmermann and Guillot 2024). Four cases on different legislative and non-legislative files attracted a lot of public attention: phasing out the combustion engine, the supply chain directive, the asylum and migration pact, and tariffs against electric vehicles from China. Due to the numerical weight of Germany in the Council, the country's behaviour with a mix of internal divisions leading to indecisiveness and last-minute attempts to mend the result, the traffic-light coalition disturbed the well-oiled and usually quite predictable consensus-oriented legislative machinery in the EU's two-chamber system:

- Under pressure from the FDP, the German government reopened the debate on the combustion engine phase-out, even though the negotiations had already been concluded, and pushed through an exemption for e-fuels (Posaner 2023).

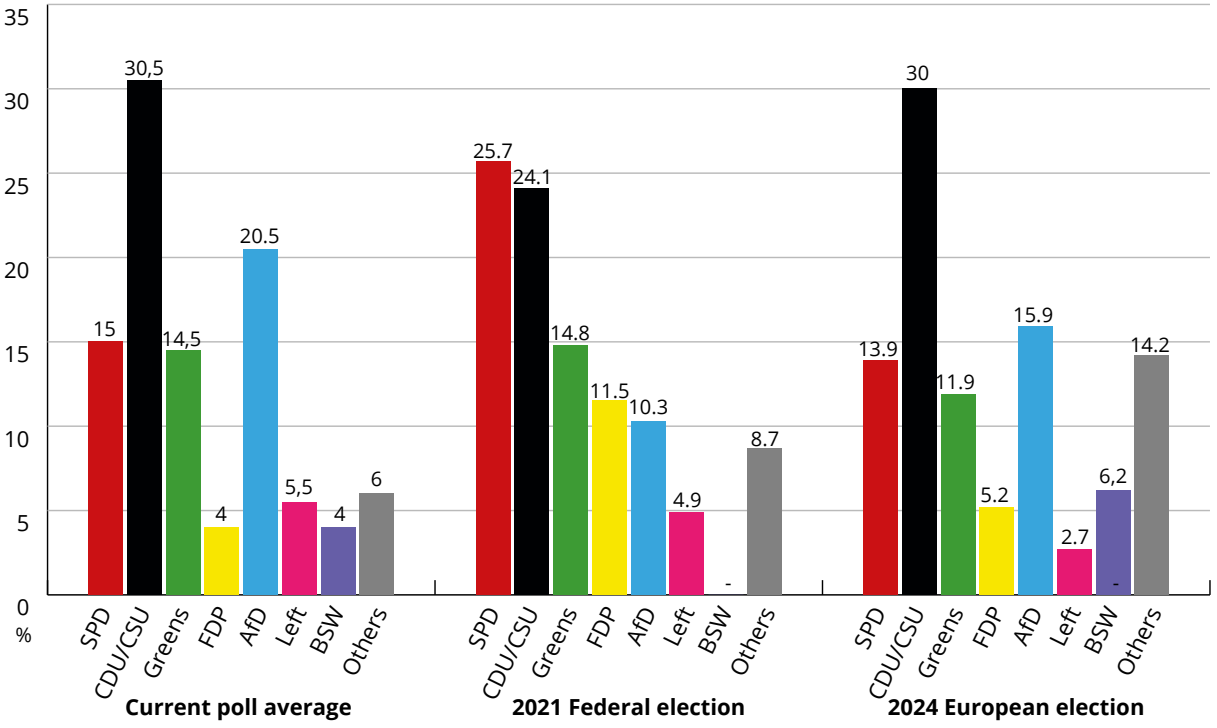
- Furthermore, the EU supply chain law (Corporate sustainability due diligence directive) was in danger of failing at the very end of the legislative process. The possibility that the German government might abstain prompted other countries to reconsider their position too, but Germany was ultimately outvoted when it abstained (Federal Ministry for Economic Affairs and Climate Action 2024).

- In the case of the asylum and migration pact, it remained unclear for a long time whether Germany would support the political agreement with its different elements and only agreed after the Chancellor had put his weight behind the reform, overruling reservations from the Greens (Balser et al. 2023).

- Finally, on the duties on unfairly subsidised electric vehicles from China, the government could not find a common position and Chancellor Scholz decided to vote against. But Germany and its allies could not reach the necessary majority threshold to prevent the tariffs that the European Commission had proposed (Reuters 2024).

In recent years, German EU policy seems to have changed for the worse. The internal disagreements of the traffic-light coalition have stirred up fears that the EU compromise machine was breaking because of Germany (Zimmermann and Guillot 2024). The next government will have to repair this damage caused by its predecessor and improve its EU coordination. But in fact, Germany has only become more like other EU countries that make their voice heard and go on the record with their opposition to certain (legislative) files in the Council. To sum up, despite internal and external pressure on the country to be a more coherent and united actor in the EU legislative process, the EU policies of Germany will certainly not change fundamentally, and continuity will prevail after the election on 23 February 2025: German action (or inaction) will to a great extent define the EU's crisis response – regardless of who will be the next Chancellor and which parties will form the next government.

Figure 1: Opinion polls and election results



Source: Own elaboration. The "current poll average" calculated above consists of Infratest dimap (ARD) of 6 February 2025 and Forschungsgruppe Wahlen (ZDF) of 7 February 2025, obtained from Wahlrecht.de (https://www.wahlrecht.de/umfragen/)

2. Electing the Bundestag, building a governing majority

In the rather complicated electoral system for the German Bundestag, building a stable governing majority is key for being elected Chancellor. Minority governments have only occurred in exceptional circumstances and lasted a few weeks until snap elections took place, as in the current situation between November 2024 and February 2025. In this respect, Germany differs from many Scandinavian countries, including Sweden.

Current opinion polls put the CDU/CSU in first place, followed by the AfD, with the SPD and the Greens neck and neck in third and fourth place. The Left Party is standing just above the 5% threshold. The FDP is struggling to make it into the next Bundestag after revelations that it systematically planned to blow up the coalition. The BSW is also below the 5% threshold. A result similar to the current opinion polls would bring major shifts compared to the 2021 election but would be roughly in line with the June 2024 European Parliament election results (see Figure 1).

In terms of the voting behaviour of men and women, men were much more likely to vote AfD in 2021 (13% compared to 7.8%), according to the Representative election statistics (Bundeswahlleiter 2021). This is in line with observations for the US election in November 2024 and regional elections in Eastern Germany in September 2024. Germany will in all likelihood once again have a male Chancellor as all leading candidates from mainstream parties in 2025 are male. Only two parties at the fringes of the political spectrum, the AfD and the BSW, have female lead candidates for Chancellor.

For electing its MPs Germany uses a mixed-member proportional system that is the outcome of both inter-party bargaining and judgements from the Federal Constitutional Court. Voters will have two decisions to make: their "first vote" determines their choice of constituency candidate; their "second vote" determines the relative strengths of the parties in the Bundestag. The "second vote" is therefore the decisive vote. In 2025, the German Bundestag will have a fixed number of 630 MPs

for the first time. If more candidates of a party win constituencies than the number of Bundestag seats that their party is entitled to according to its share of the "second votes", not all of the party's direct candidates enter the Bundestag. In addition, the so-called "basic mandate clause" exists: if at least three MPs of a party are elected nationwide in their constituencies, the 5% threshold does not apply to that party.

The Federal Republic of Germany has only witnessed a complete change of government once, in 1998, when Helmut Kohl's coalition government between the CDU/CSU and the FDP was replaced by Gerhard Schröder with a coalition composed of the SPD and Greens. In all the other cases of government change, one of the previous coalition partners remained in power.

Forming a coalition government and building a majority are decisive, because no party will obtain, on its own, more than half of the seats in the Bundestag and, as stated above, there is no tradition of minority governments in Germany. The stakes in a federal election are also high because despite Germany being a federal state, most of the key competencies, except for home affairs (police) and education, lie with the central government. The regions, however, participate in the federal decision-making process and have veto powers in many policy areas.

3. The Future of Europe and domestic challenges

There are many pressing European issues that a new governing coalition in Berlin will have to address. In addition, the domestic responses of the next German government will have European implications. For instance, Germany's fiscal and economic policies, the state of its infrastructure, German defence spending and support for Ukraine, the country's role on the international stage, its relations with the Trump administration and German policy towards Russia and China are just some of the areas in which domestic decisions in Germany will have a profound impact on the EU. As for the first domestic challenges, the country will have to substantially increase its defence spending by tens of billions of euros a year once the special fund for the armed forces has been exhausted, and Germany will have to use subsidies to ensure that the green transition does not overburden households and industry. However, the Federal Constitutional Court's ruling against creative use of previously agreed debt allowances limits the funds available while respecting the debt brake.

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In terms of public opinion, 37% of Germans currently consider immigration and refugees to be one of the two most important political problems in Germany that politicians need to address. This issue has gained importance recently and is now tied with the economy (34%). Foreign policy issues relating to war and peace (14%), the environment and climate (13%) and social injustice (11%) follow some way behind, according to ARD Deutschlandtrend (Tagesschau 2025). In the 27 member states, trust in the European Union as measured by the Eurobarometer survey reached 51% in 2024, the highest level since 2007, with Germans' trust closely behind at 49% (European Commission 2024b).

Three EU reports, by Mario Draghi, Enrico Letta and Sauli Niinistö put forward concrete proposals concerning EU competitiveness, the Single Market, and defence and civil security. These reports must be followed by concrete action and financial resources to underpin the efforts. Ursula von der Leyen has outlined her plans for the 2024–2029 term in the "Political guidelines" for the new Commission (European Commission 2024a). In recent weeks and months, an idea for a "€500bn defence fund" (Tamma and Foy 2024) has apparently been discussed by EU countries, and besides the need to boost research and innovation spending in the EU to €750–800bn annually, as stated in the Draghi report, the next medium-term financial framework from 2027 onwards faces many contradicting priorities concerning what to spend money on. Germany and the EU will face tough choices and will need to find solutions

that do not cross the red lines imposed by the Federal Constitutional Court in its judgements on the European Stability Mechanism and the Next Generation EU recovery fund.

Classic foreign policy is an area where Germany had long imposed self-constraint on itself. Russia's war against Ukraine has forced the country to play a more active role. But German *Europapolitik* also matters: how will Germany pursue the EU's aim of strategic autonomy? In terms of decision-making in European foreign policy, the question is whether Germany would be willing to accept being outvoted by its EU partners if decisions were taken by a qualified majority.

Beyond external action, internal reforms will be on the EU's political agenda in the coming years in order to make the Union fit for enlargement. Chancellor Olaf Scholz outlined his plans for EU reform in a speech at Charles University in Prague (Federal Government 2022b) and in another before the European Parliament (Federal Government 2023). The first speech was designed as a (very late) reply to Emmanuel Macron's 2017 Sorbonne speech. Institutional issues that he wanted the EU to address included the need to extend qualified majority voting in the Council, the working methods of the Commission, as well as the composition and representativity of the European Parliament (Federal Government 2022b).

"Is the country ready to embark on changing the EU treaties or is it slowly 'becoming Eurosceptic' and putting its own national interest first?"

But is Germany able and willing to cede more sovereignty to supranational institutions? For many years, the country preferred intergovernmental solutions in the area of fiscal and economic policies. In 2020, it then proposed anchoring the EU's recovery fund in the Community system. Is the country ready to embark on changing the EU treaties or is it slowly "becoming Eurosceptic" (Leonard and Puglierin 2021) and putting its own national interest first? Germany followed many other member states in their reluctance to endorse the possibility of treaty change after the Conference on the Future of Europe. But even though formally the last substantive revision came with the Treaty of Lisbon in 2009, the functioning of the EU has evolved considerably, notably due to Germany's insistence. This suggests that in the tradition of German EU policy on constitutional issues, the country might push for a combination of changes that require an ordinary treaty revision and changes that can be achieved without opening the treaties or via existing passerelle clauses.

Although this is not a complete overview of the challenges that the EU and Germany face, and although some argue that economically Germany has become the "sick man of Europe" again (Wolf 2024), a lot will depend on how the next government addresses these issues, if it adopts a wait-and-see approach or if the next Chancellor pushes forward bigger domestic and European initiatives. France will probably continue to be paralysed in its domestic politics and Emmanuel Macron will not be standing for re-election in 2027. It is therefore not certain that the Franco-German axis will be able to trigger a new momentum for the Future of Europe after the German election.

4. What divides the political spectrum in European and international affairs, security, economic and fiscal policy?

The main political parties are aligned with their respective European party families and often play a decisive role within them: the SPD has considerable weight within the Party of European Socialists (PES), the CDU and CSU dominate the European People's Party (EPP), Alliance 90/The Greens belong to the European Green Party, the FDP is part of the Alliance of Democrats and Liberals (ALDE), the AfD dominates the new Europe of Sovereign Nations group in the European Parliament while the Left Party is a member of the European Left, and only the BSW is non-aligned.

Germany's federal governments have always endorsed European integration and international cooperation, but there are substantial differences between the parties that have been part of a government and particularly with those that have remained in opposition. So, according to their electoral manifestos for the 2025 federal election,

the question is how do the SPD, CDU/CSU, Greens, FDP, AfD, Left Party and BSW want to change domestic and EU policies?[1]

"Olaf Scholz also wants to take on more debt and reform the debt brake: The security of the country should not be set against social security in view of the threat from Russia."

The *SPD* wants to campaign on the topics of family, pensions and wages. Back in October 2024, even before the traffic-light coalition came to an end, the SPD decided on important campaign promises such as relief for 95% of taxpayers, a purchase premium for electric cars and a minimum wage of 15 euros (Deutschlandfunk 2024a). Olaf Scholz also wants to take on more debt and reform the debt brake: the security of the country should not be set against social security in view of the threat from Russia (ibid.). The SPD welcomes the reports by Letta and Draghi and promises to support the European Commission in their implementation (SPD 2025, 7). It wants to reform the Multiannual Financial Framework and focus it more strongly on central policy areas of the EU that deliver recognisable European added value and invest more in them (ibid., 15). The specific EU part of the election manifesto is called "[w]e are fighting for a strong and effective Europe" with a pledge that the SPD wants a European Defence Union as a priority. The party is in favour of the swift accession of the Western Balkan states and emphasises that Ukraine and Moldova should also become part of the EU while "[t]he Copenhagen criteria must always be fulfilled" (idid., 53). The SPD wants to take even more consistent action against all those who violate the common values. To this end, existing protective instruments for violations of the rule of law, from infringement proceedings to the withdrawal of voting rights, should be utilised and further developed much more consistently than before. European treaty reforms must take place at the latest with EU enlargement, the party is in favour of setting up a results-oriented European Convention, and an "essential component of institutional reforms" is to replace the principle of unanimity in the European Council and the Council by introducing majority voting (ibid., 53).

The *CDU/CSU* is planning a general year of service for both men and women that can be completed in social organisations, in civil protection or in the German armed forces (Doll 2024). The CDU/CSU wants to return to nuclear energy as a transitional technology and is in favour of a return to the combustion engine to strengthen the competitiveness of the German automotive industry (ibid.). It also wants to make Germany more competitive internationally, particularly in the areas of digitalisation and artificial intelligence. The CDU/CSU is committed to the debt brake, but Friedrich Merz has recently hinted that a reform might be possible (Frühauf 2024). On specific EU policies, the CDU/CSU call for setting priorities and "[m]ore Europe only where Europe creates an added value for all". A "deal for competitiveness" and less bureaucracy is also among their demands. The EU's capability to act should be strengthened via institutional reforms, a simplified subsidiarity monitoring and a more effective defence of the rule of law. The parties also want to recalibrate the EU's enlargement and neighbourhood policy with intermediate steps for candidate countries while sticking to the criteria (CDU/CSU 2024, 52–53).

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Alliance 90/The Greens want more distributive justice and a human rights-orientated migration policy (Deutschlandfunk 2024b). They also call for more efforts in climate protection and a relaxation of the debt brake. In view of the Russian war of aggression in Ukraine, the Greens are calling for a stronger commitment to civil defence and disaster control as well as internal and external security. The Spitzenkandidat of the Greens, Robert Habeck, is also in favour of a further special fund for the Bundeswehr (ibid.). With respect to a "strong European Union", the Greens want a European

[1] The parties are sorted depending on their election result at the last federal election in descending order.

Union "that defends our democracy", emphasise Germany's responsibility as the largest and economically strongest member state, and want to extend QMV on the rule of law and, elsewhere, a full right of initiative for the European Parliament, transnational lists and to strengthen the citizens initiative. The party supports the accession of the Western Balkans, Ukraine and Moldova. The Greens' vision is a "Federal European Republic with its own Constitution". The next medium-term budget should be more focused on innovation and the future of the European economy, have new own resources and argues that common bonds via the European Investment Bank have proven their value (Bündnis 90 Die Grünen 2024, 60–62).

"The AfD renounced a German EU exit ('Dexit') in its election programme."

"Everything can be changed" – this is the *FDP*'s central slogan for the federal election campaign with which the Liberals want to create optimism amid a deep economic crisis (Buchwald 2024). The key issue therefore remains the economic turnaround for which the FDP has long been calling. Citizens and companies must be relieved not only of high taxes but also of bureaucracy and energy that is far too expensive. The FDP's defence of the debt brake is that it is a constitutional requirement and not a ban on debt (ibid.). It wants "the EU's strategic sovereignty to be further developed" and demands that the ambitious objectives of the Strategic Compass are pursued more consistently by the member states. The party is "particularly in favour of a reduction in the size of the Commission, a right of initiative for the European Parliament and qualified majority decisions in the EU's common foreign and security policy" (FDP 2025, 50). Institutional reforms are also necessary to prepare the EU for the next round of enlargement: "The accession of the Western Balkans, Moldova and Ukraine to the EU in accordance with the Copenhagen criteria is in the interests of Germany and Europe" (ibid.). The party demands that the financial resources of the European Union are better distributed, in line with future tasks, towards innovation, research and foreign and defence policy.

One focus for the *AfD* besides migration policy is the reduction of energy costs in order to stop the "deindustrialisation of Germany"; there should also be no more financial or military support for Ukraine (Deutschlandfunk 2024c) and the party calls for reopening the North Stream II pipeline. The AfD renounced a German EU exit ("Dexit") in its election programme: "The party apparently wants to soften the radical nature of the 'Dexit' demand" (Frankfurter Rundschau 2025) but is still pursuing a rigorous EU course. The "European economic and interest community", which the AfD also refers to as a "Europe of fatherlands", reflects a desired isolation course that is also visible in the pledge to renegotiate relations with all member states and other European countries (ibid.).

At the centre of the *Left Party*'s proposals are a reduction in the cost of living for average and low earners, the reintroduction of a wealth tax, a special tax for billionaires, a one-off wealth levy for the super-rich and an increase in the top rate of inheritance and income tax (Beucker 2024). In terms of foreign policy, the Left Party rejects the stationing of US medium-range missiles in Germany as well as foreign deployments of the Bundeswehr, the reinstatement of compulsory military service and German arms exports (ibid.). With regard to Russia's war against Ukraine, the party is in favour of "more targeted sanctions aimed directly at the Kremlin's war chest". These could be an "important means of exerting pressure for a just peace for Ukraine" (ibid.). The party argues that the EU-27 needs to be reformed in order to become fit for enlargement, and wants the European Parliament "to finally be given the full right of initiative" and EU-wide referendums and plebiscites. The party calls for a "Peace Union instead of Fortress Europe", and it opposes the further armament of the EU and the militarisation of Europe's borders. The party also demands that the Frontex agency be transformed into a "European rescue mission" (Die Linke 2025, 1000–1039).

The *BSW* is mainly concerned with economic and peace policy, social justice and migration (Deutschlandfunk 2025). Foreign and peace policy is particularly important to the BSW. The party is against the supply of weapons to Kiev and would also like to lift Western sanctions against Russia: energy and raw materials from Russia should help the German economy to overcome its weak growth (ibid.). Furthermore, the party rejects the stationing of US medium-range missiles in Germany. With

respect to the EU specifically, the BSW argues that "the EU has completely lost sight of its founding mission of peace and prosperity" and wants to make the EU what it was founded for: it "must be a peace broker and must not become a party to war" (BSW 2025, 30). The party does not want any further centralisation of power at the European Commission, but a transfer of competences back to the member states. Europe must achieve digital sovereignty vis-à-vis the powerful data octopuses of the Silicon Valley. The BSW wants a "stop to EU enlargement, that also applies to Ukraine, which would otherwise become a bottomless pit for German taxpayers" (BSW 2025, 31).

This is, in short, what the electoral manifestos for the 2025 federal election say. To sum up, what are the differences between Germany's main political parties in terms of their priorities in European and international affairs? Four manifestos (CDU/CSU, SPD, FDP and Greens) adopt a generally pro-European tone in favour of international cooperation, while the AfD, finally, advocates an anti-EU course in its 2025 manifesto and, unlike other extreme right parties in Europe, has not softened its Eurosceptic stance in recent years. The Left Party and the BSW share some peace policy goals with respect to Russia and Ukraine, but the BSW has the more radical stance.

5. Coalition scenarios and their EU impact

More than the name of the next Chancellor, it is the governing coalition that matters in German politics. In July 2021, for example, 69% of the population considered the party-political composition of the next government important while only 22% thought that it was more important who will be the next Chancellor (Kornelius 2021).

Germany's coalition negotiations can take several months. After the election on 23 February 2025, one should not expect a new Chancellor to enter office before late spring. In 2017/18, it took more than five months from the election to a new government after negotiations between the CDU/CSU, the Greens and the FDP had collapsed.

Since the new European Commission took office on 1 December 2024, the EU's next institutional cycle has fully started and the EU executive has announced many files and initiatives – for example, on agriculture, the Single Market and competitiveness, and defence. The arrival of Donald Trump makes decisive European responses at the intergovernmental and supranational level even more important. With the current minority government being a caretaker government instead of a fully operational new coalition, Germany would certainly not, for example, be able to agree on any new joint financing or borrowing.

> "The arrival of Donald Trump makes decisive European responses at the intergovernmental and supranational level even more important."

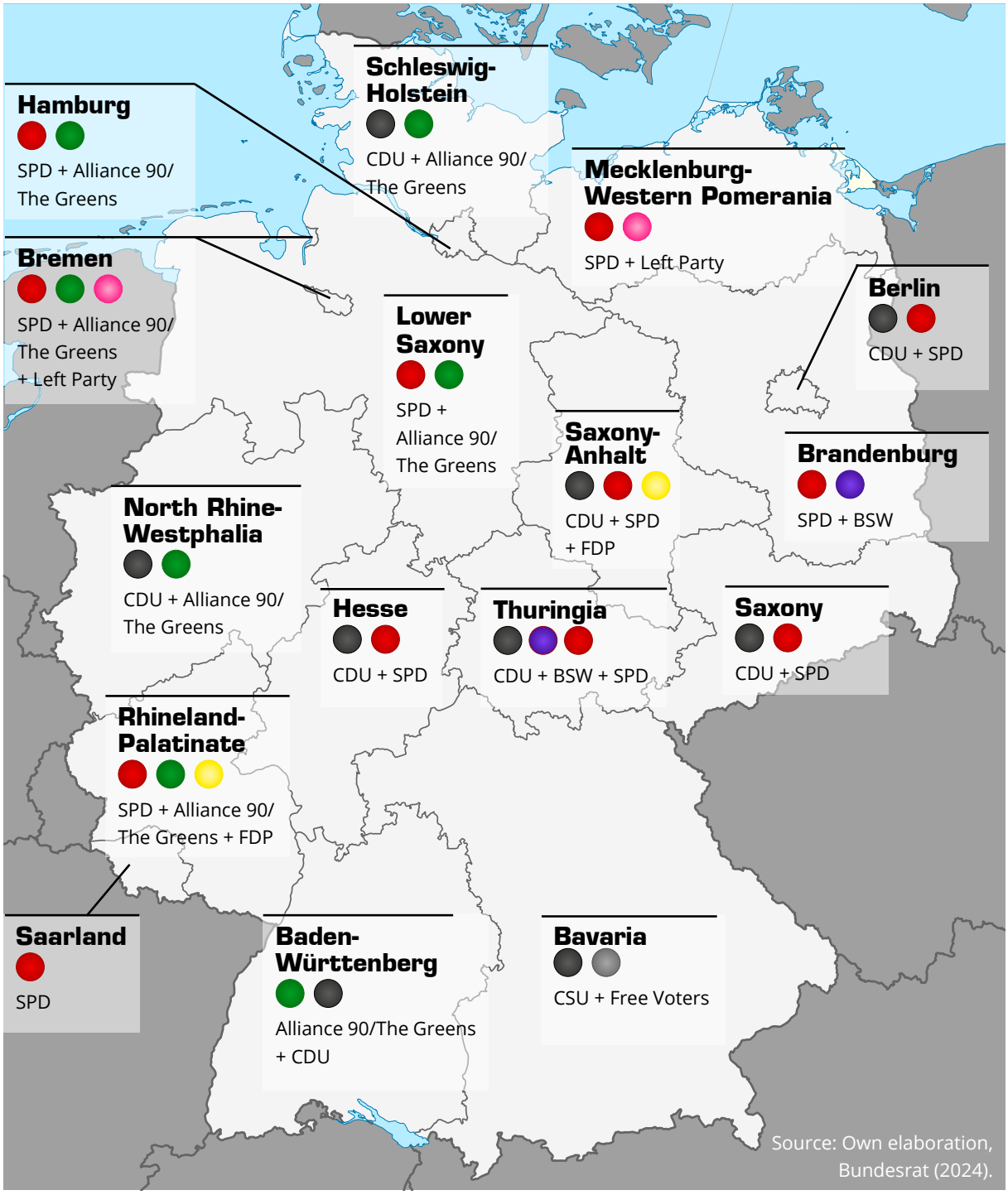
Before the start of formal negotiations, parties will conduct exploratory talks (Sondierungsgespräche) in different constellations to examine the intersections with their possible partner(s). At different stages of the process, committees, congresses or even all registered members of an individual party can be asked for their view or make a decision on entering, continuing or concluding talks or negotiations. For Social Democrats and Greens, such an involvement is certain and strengthens their hand in any constellation.

The written coalition agreements are very lengthy too. They have been over 100 pages long and their precooked compromises set the course for government policies over the next four years, so their importance can hardly be overestimated (Kreilinger 2022).

5.1 Germany's coalition landscape at the regional level

Previously usually formed by two parties, governing coalitions have already become quite motley at the regional level due to a more fragmented party system. Only in Saarland one party, the SPD, can govern alone. As can be seen below (Figure 2), the other 15 regions are governed by ten different types of coalitions: five governments are classic centre-right or centre-left (Hamburg and Lower Saxony are governed by the SPD and Greens; the SPD, Greens and the Left Party form the

Figure 2: Governing coalitions at the regional level



government in Bremen; the SPD and the Left Party govern Mecklenburg-Western Pomerania; Bavaria is governed by the CSU and Free Voters). There are two further two-party coalitions: the CDU and Greens govern together in Baden-Württemberg, North Rhine-Westphalia and Schleswig-Holstein; and a Grand coalition of the CDU and SPD exists in Berlin, Hesse and Saxony (minority government). Finally, some coalitions are unorthodox combinations of one big party (the CDU or SPD) and smaller parties: in Saxony-Anhalt between the CDU, SPD and FDP, while Rhineland-Palatinate is governed by the SPD, Greens and the FDP. Two newly formed coalitions

involve the BSW: the CDU, the BSW and the SPD form a minority government in Thuringia, while the SPD and the BSW govern Brandenburg.

> "[...] the next federal government will not have an outright majority in the Bundesrat. Negotiations with the opposition will therefore be necessary for many legislative files [...]"

In the German bicameral system, the above-mentioned regional governments are represented in the Bundesrat. Contrary to many other federal states, Germany's 16 regional governments participate directly in the decisions taken at the federal level, through the Bundesrat. For roughly half of the legislative files, the Bundesrat must give its consent by absolute majority (abstentions count as "no" votes). Votes are distributed in accordance with degressive proportional representation according to the population, ranging from six votes for North Rhine-Westphalia (18 million inhabitants) to three votes for Bremen with 700,000 inhabitants. Each region's votes can only be cast together. Given the multitude of different coalitions, the next federal government will not have an outright majority in the Bundesrat. Negotiations with the opposition will therefore be necessary for many legislative files, including possible EU dossiers that the regions monitor closely. EU treaty changes or a revision of the debt brake would require a two-thirds majority and thus need even broader support.

As this brief overview has shown, "motley" coalitions are daily business at the regional level. But before the traffic-light coalition that lasted from 2021 to 2024, federal governments had only consisted of coalitions between two partners.

5.2 Five conceivable coalitions at the federal level

According to current opinion polls, a couple of different coalitions are theoretically possible at the federal level. Just like in 2021, this time it is quite uncertain which parties will be in government after the election. There is also no clear-cut alternative between a centre-left and a centre-right block as had been the case at least until 2013.

All parties have ruled out cooperation with the AfD. Similarly to the "cordon sanitaire" of democratic parties against the far-right in the European Parliament, the term "firewall" (Brandmauer) is used as a metaphor in German politics – "firewall against the AfD" – and is used by and in relation to the CDU/CSU in particular to draw a line between them and the AfD. When the party accepted to rely on the AfD in Bundestag votes to pass a motion on migration policy on 29 January 2025, this was widely criticised by many, including former Chancellor Angela Merkel. Two days later, the CDU/CSU failed to secure a majority with FDP, AfD and BSW for a more restrictive immigration law.

A few other coalition options would contain partners that are ideologically very remote from one another. The CDU/CSU excludes any type of cooperation with the Left Party, but not with the BSW, with which the CDU (and the SPD) entered a coalition in Thuringia, just like in Brandenburg where the SPD and BSW have formed a government. The demands of the BSW leader and founder Sahra Wagenknecht to stress the need for a diplomatic solution in Russia's war against Ukraine, her position against financial and military support for Ukraine and her opposition to stationing US medium-range missiles in Germany did not block cooperation in these two regions but are seen as unacceptable for both the CDU/CSU and the SPD at the federal level (Deutschlandfunk 2025).

This leads to a total of five conceivable coalitions, but it is necessary to remember how volatile the opinion polls were in the run-up to the 2021 election. With respect to the future government, two coalitions between only two political forces, a *Grand coalition* (CDU/CSU and SPD) and a *Black-Green coalition* (CDU/CSU and the Greens), would, according to current opinion polls, achieve a majority of seats. A coalition between the CDU/CSU, SPD and Greens (Kenya coalition) would have around 60% of the seats in the Bundestag but does not seem plausible because parties are striving for minimum winning coalitions. The three options including the FDP, *Jamaica coalition, traffic-light coalition and Germany coalition*, complete the set of five. For these coalition options, the FDP would have to surpass the 5% threshold and at the same time the CDU/CSU and their respective junior coalition partner would have to fall short of the majority required for a two-party coalition, which is more likely if the FDP enters the Bundestag.

The five conceivable governing coalitions might allow the country to produce, once again, the mainstream consensus policies that have characterised the EU since its creation. Although nobody knows the strength of individual parties in the next parliament and government, let alone the allocation of key portfolios such as the Chancellor, the Foreign Minister, the Finance Minister, the Minister of State for EU affairs and the EU advisor to the Chancellor, one can also make some speculative assumptions about a few general EU policy implications that the five above-examined coalitions would have. In terms of the allocation of ministries and gender balance within the government, Olaf Scholz's team was the first gender-balanced cabinet at the start of the term (gender balance became distorted when the female defence minister was replaced with a male). Friedrich Merz went on the record saying that "he does not necessarily want to fill half of his government with women" (Tagesschau 2024).

Grand coalition: CDU/CSU + SPD

For 12 of the past 20 years, Germany was governed by the CDU/CSU and the SPD. After 2021, the Social Democrats had little appetite for continuing to govern with the CDU/CSU and – probably weakened compared with their previous result – they would find it even more difficult in 2025 to push for their policies than during the Merkel years. Currently, the CDU and SPD govern together in Berlin and Hesse. The CDU opted for the Social Democrats as its junior coalition partner after the 2023 election in Hesse and dropped the Greens, its long-time coalition partner. In Saxony, the CDU and SPD form a minority government. At the EU level, many compromises in the European Parliament are forged between the EPP and the Progressive Alliance of Socialists and Democrats (S&D), with German MEPs in leading roles in both groups. However, previous Grand coalitions at the national level (from 2005 to 2009 and 2013 to 2021) often only agreed on the lowest common denominator and are blamed for Germany's weak economic growth, crumbling infrastructure and lagging digitalisation. Yet, the first Grand coalition that lasted from 1966 to 1969 has generally been viewed as successful.

Black-Green coalition: CDU/CSU + Greens

In three states, Baden-Württemberg, North Rhine-Westphalia and Schleswig-Holstein, the CDU and Greens govern together (with a premier from the Greens in Baden-Württemberg and CDU premiers in North Rhine-Westphalia and Schleswig-Holstein). The Greens have recently been "cozying up to Merz's CDU" (Nöstlinger 2024) by emphasising that both are more supportive of Ukraine in its war with Russia than Scholz. Bavarian CSU leader Markus Söder has, however, announced that he would veto a Black-Green coalition. Cooperation between the CDU and Greens is working at the regional (and local) level but has not emerged at the national or EU level yet. The two possible partners have often found themselves in opposition to each other on EU legislative files. At the re-election of Commission President Ursula von der Leyen in July 2024, the Greens/EFA group in the European Parliament reportedly supported her but experienced a three-way split in the vote on the Commission as a whole: Greens/EFA MEPs from Germany abstained or voted in favour (European Parliament 2024, 14–15). While the Greens have positioned themselves as strong advocates of deepening European integration, it is important to bear in mind that many in the CDU no longer have the integrationist mindset of the Kohl years but a more pragmatic, rational, cost-benefit approach to European integration, which was already visible in the German "Zahlmeister" (paymaster) narrative of the 1990s.

Jamaica coalition: CDU/CSU + Greens + FDP

If the CDU/CSU and Greens fall short of a majority on their own and if the FDP manages to re-enter the Bundestag, a Jamaica coalition that takes its name from the colours of the country's flag could become an option. Talks to form such a coalition failed at a late stage in 2017 when the FDP walked away, partly because of disagreements over the further development of the European Stability Mechanism (Gammelin 2017). Despite adding the Free Democrats as the third partner to the Black-Green coalition if these two parties do not reach a majority, it is still possible to identify EU issues on which the parties agree – for example, on strengthening EU foreign policy and the European Parliament. The participation of the FDP would, however, strengthen those voices within the CDU/CSU that are opposed to further fiscal integration at the EU level and make any steps into that direction more difficult.

Traffic-light coalition: SPD + Greens + FDP
The traffic-light coalition lasted almost three years from 2021 to 2024 before it broke apart over the budget for 2025. Trust between the FDP and its two former partners has completely broken down after the collapse of the government, which adds another major obstacle for this constellation in addition to overcoming policy differences between the centre-left and the Liberals. Currently only Rhineland-Palatinate is governed by a coalition composed of these three parties. For a new traffic-light coalition to be conceivable, a lot of damage would have to be repaired, key players like Christian Lindner would have to be removed from their responsibilities and the FDP would have to surpass the 5% threshold. But even in a scenario where a traffic-light coalition was the only option for the SPD or Greens to enter the Chancellery, both of the two parties might be more tempted to be the junior coalition partner of the CDU/CSU than to repeat the failed 2021–2024 experiment.

Germany coalition: CDU/CSU + SPD + FDP
The name of this coalition comes from the colours of Germany's flag. In Saxony-Anhalt this type of coalition exists, but it has not really caught public imagination for the federal level yet. The Social Democrats would find it even more difficult than in a Grand coalition to push for their policies against the combined centre-right strength of CDU/CSU and FDP. At the EU level, many compromises in the European Parliament are forged between the three political groups to which these three national parties belong to. Compared to a Grand coalition, with the Liberals joining lowest-common denominator compromises are even more likely. The absence of the Greens would probably lead to less ambitious EU climate policies and national climate actions while the presence of the FDP in government would hamper further fiscal integration at the EU level.

5.3 More like other member states

After three and a half years in opposition, the CDU/CSU seems likely to return to power. With the Commission Presidency in its hands, the EPP dominating the Commission, an EPP-led government in Poland, and the EPP with the median MEP in the European Parliament able to build majorities with the centre and with the groups to its right (Hix et al. 2024), the CDU/CSU has a powerful network in Europe. Politically, with the CDU/CSU as the strongest party in the federal election, the result would be in line with the current political landscape in the EU and most of its member states.

But when the party of the next Chancellor obtains 25% or 30% it will be comparatively weak in any governing coalition. In addition, the role of the pro-European opposition party (the CDU/CSU or the SPD or the Greens) will matter even more in the coming years, because the EU might consider treaty changes. In order to set up the €100bn special fund for the armed forces that was announced by Scholz in his Zeitenwende speech on 27 February 2022 (Federal Government 2022a), the government needed the support of the CDU/CSU to reach the two-thirds majority required for the necessary modification of the basic law as an exemption to the debt brake.

Inside the Bundestag a block composed of the AfD, the BSW and the Left Party, which do not support the current German security and defence policy, could reach more than 30% of the seats after the 2025 election.[2] These parties are Eurosceptic, albeit to different degrees. While they are short of a majority, their collective strengthening could easily constrain a government in EU affairs both on ordinary legislative files and on far-reaching changes, such as treaty modifications or new joint borrowing or financing that might require a two-thirds majority in the Bundestag. It is also difficult to imagine that the FDP could approve any kind of "Eurobonds", which would make the possible support base for such a move even smaller.

Among Germany's European partners, Emmanuel Macron had trouble both with Angela Merkel's Grand coalition and Olaf Scholz's traffic-light coalition. Frugal countries would probably be happy with the fiscally conservative policies of a governing coalition led by the CDU/CSU and a Chancellor Friedrich Merz. But the next head of government might have to reconsider this

[2] The current poll average (Table 1) puts the AfD at 20.5%, the Left Party at 5% and the BSW at 4%. The FDP also stands at 4%, while other parties (not entering the Bundestag) are at 7.5%.

position just like the Danish government did recently. The asylum and migration plans of the CDU/CSU are in line with the centre-right in the EU, but it would remain to be seen to what extent they would become government policy in a governing coalition. Both EU policies and the politics of Germany are increasingly becoming EU mainstream, and Germany's national parliament is unlikely to remain the pro-European exception that is surrounded by more and more Eurosceptic views in other parts of the EU.

6. The next Chancellor: Expected to lead at the EU level

When a new Chancellor (or the old Chancellor) travels to the first European Council meeting, after being elected or re-elected, possibly in June 2025, all eyes will be on Germany's head of government because the EU will have to take decisions.

The two main candidates for Chancellor are well known to the German public. Olaf Scholz is the incumbent and has prior executive experience as Finance Minister in the last Grand coalition (2018–2021), as mayor of Hamburg and as Labour Minister (2007–2009). Friedrich Merz was an MEP from 1989 to 1994 before he became a Member of the Bundestag. He served as head of the CDU/CSU parliamentary group and leader of the opposition from 2000 until 2002 when he was ousted by Angela Merkel and initially left politics in 2009. He has no experience in government. In 2018 and 2021, his first two attempts to become CDU leader failed, but he succeeded in 2022. Some observers also point to his business experience as chairman of the supervisory board of Blackrock Germany (Chazan 2024).

> "Friedrich Merz [...] would be the first Chancellor without any prior executive experience [...]"

Besides the coalition, the composition of government and the allocation of ministerial portfolios, it matters who is at the top. The Chancellor has a pre-eminent role on the European stage, not least through the greater role of the European Council in recent years. Angela Merkel's 16-year term was marked by multiple crises in European and international affairs such as the rejection of the constitutional treaty, the euro crisis, the migration crisis, Brexit and the pandemic. The Chancellor's crisis management skills as the longest-serving member of the European Council were widely acknowledged. Her departure left a vacuum that her fellow Heads of State or Government struggled to fill, although Olaf Scholz managed to avoid a veto by Viktor Orbán against opening accession negotiations with Ukraine by sending him on a "coffee break" when the vote took place (Malingre 2023). Friedrich Merz, who would be the first Chancellor without any prior executive experience, would probably be initially more preoccupied with domestic politics and not be able to take over these international files immediately, thus increasing a political vacuum that autocratic leaders will be eager to fill – to divide and rule Europe.

Furthermore, any current EU Head of State or Government attends so-called "pre-summits" of his or her political family ahead of meetings of the European Council. Angela Merkel was the key figure at EPP pre-summits. Olaf Scholz has bolstered the profile of PES pre-summits. If Friedrich Merz succeeds him, he will further strengthen the EPP's current dominance in EU politics and further increase the prominence of the CDU/CSU inside the EPP, if one thinks of Manfred Weber and Ursula von der Leyen. But the times when the EPP and the PES divided the European Council table between themselves are over. Among the five biggest EU countries (Germany, France, Italy, Spain and Poland) only Poland currently has an EPP member of the European Council, Donald Tusk. Germany and Spain have PES heads of government, while France's Macron and Italy's Meloni belong to Renew Europe and the European Conservatives and Reformists, respectively (Hix et al. 2024).

Conclusion

In Germany, the political landscape of a fragmented party system is in flux. The country is thus heading for more political instability and insecurity. The way in which Germany deals with European and international affairs changes according to many factors: the composition of the governing coalition is one of them, the leadership and style of the Chancellor is another, but the allocation of portfolios within the government, the international

environment, and general domestic developments are just a few other very relevant aspects that must be considered.

Nobody can currently reliably predict which parties will form the new government: even only two weeks in advance the outcome is difficult to foresee. This analysis has therefore highlighted the priorities in the EU sections of the electoral manifestos of the SPD, CDU/CSU, Alliance 90/The Greens, FDP, AfD, Left Party, BSW. An overview of the currently coexisting different types of coalitions in the 16 German regions has subsequently shown how fragmented the political landscape has become. But on this basis, the paper identified five conceivable coalitions. Each of them could govern Germany after the election if three conditions are met: a parliamentary majority, a successful conclusion of coalition negotiations and electing the jointly proposed candidate as Chancellor in the Bundestag.

The composition of the next governing coalition will make a difference to how individual EU policies are pursued by Germany. For each of the five coalition scenarios, German EU policies are likely to take a slightly different course. In sum, another *traffic-light coalition* of the SPD, the Greens and the FDP would struggle ideologically and in terms of personal relationships, but it is a coalition option that would (on condition of the SPD catching up considerably in the polls) keep Olaf Scholz in the Chancellery while a *Grand coalition* composed of the CDU/CSU and SPD would be able to precook centrist EU-wide compromises. A *Black-Green coalition* between the CDU/CSU and the Greens has been ruled out by the CSU despite an overture by the Greens and would not be easy in EU affairs because the two partners have often had different views on EU legislative files. In a *Jamaica coalition* (CDU/CSU, Greens and FDP), the entry of the Liberals would further complicate things, especially when it comes to EU finances. In a *Germany coalition*, the SPD would join CDU/CSU and FDP instead of the Greens, but governing in this configuration might not be easier. It is also important to bear in mind that each of these five coalitions has a significant part of the population disapproving that respective constellation.

This election really matters for Germany, for its European partners and for the EU as a whole. On the one hand, Germany's role in the EU is becoming even more important in the context of Zeitenwende and Trump II, although the country has always been an important player in EU politics. For other countries it is wise and even essential to engage with the next German government and to think about how the priorities of different governing coalitions align with their own priorities. On the other hand, the German Chancellor is naturally expected to lead at the EU level. The party affiliation of the German Chancellor is quite important, because if the CDU/CSU and thus the EPP win the German Chancellorship, this would further shift the political balance in the European Council to the centre-right.

> "This election really matters for Germany, for its European partners and for the EU as a whole."

Ultimately the increasing political fragmentation and uncertainty will not be immediately resolved after the election. This creates a situation in which Germany, a source of political stability and predictability for the entire EU, might not be able to provide this in the same way as it had done in the past.

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