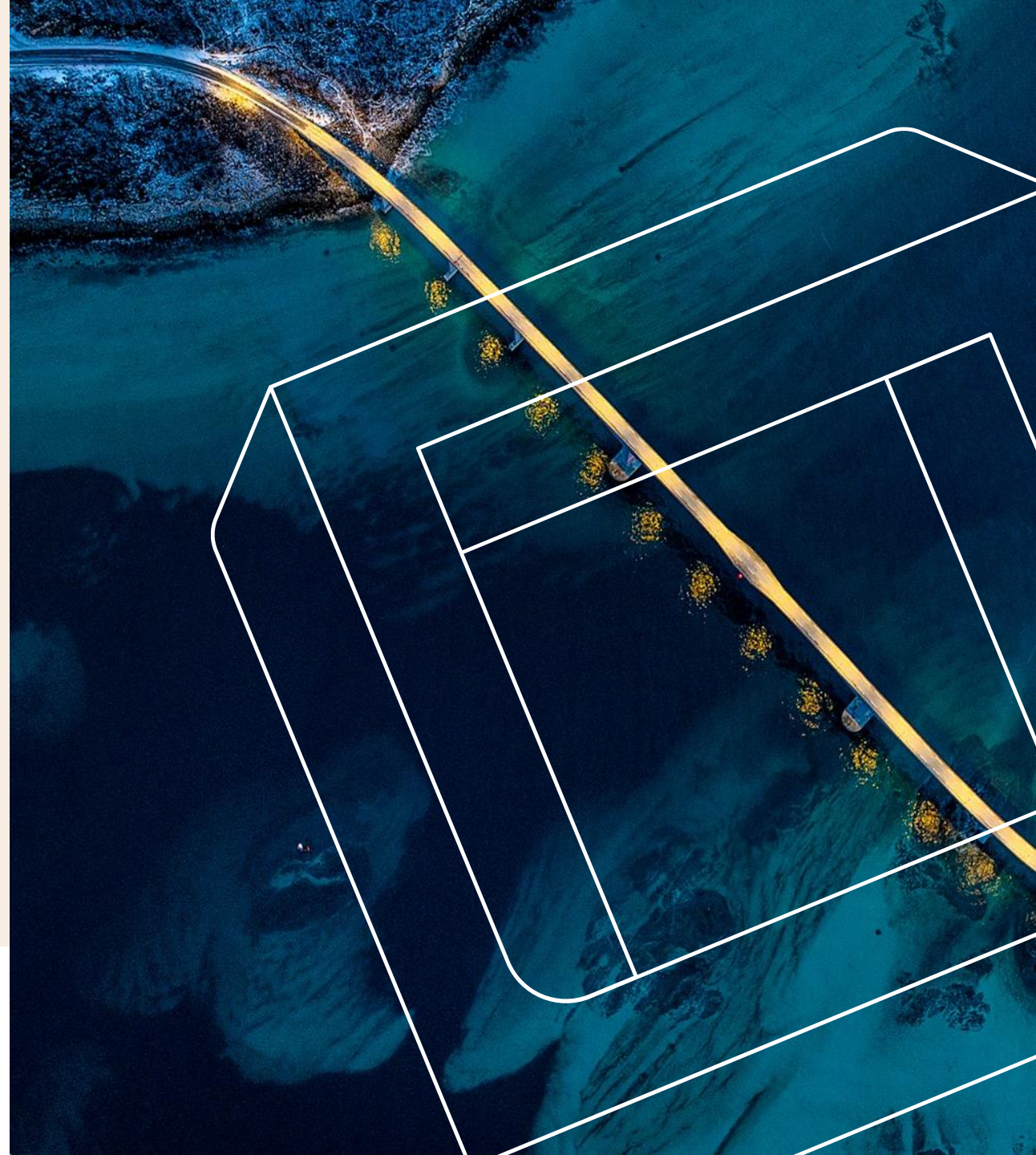


Election Talk: 2025 German Federal Election

Dr. Roland Abold, Nicolas Bécuwe, Julien Zalc

18 February 2025



Housekeeping points



01

This session will be recorded.

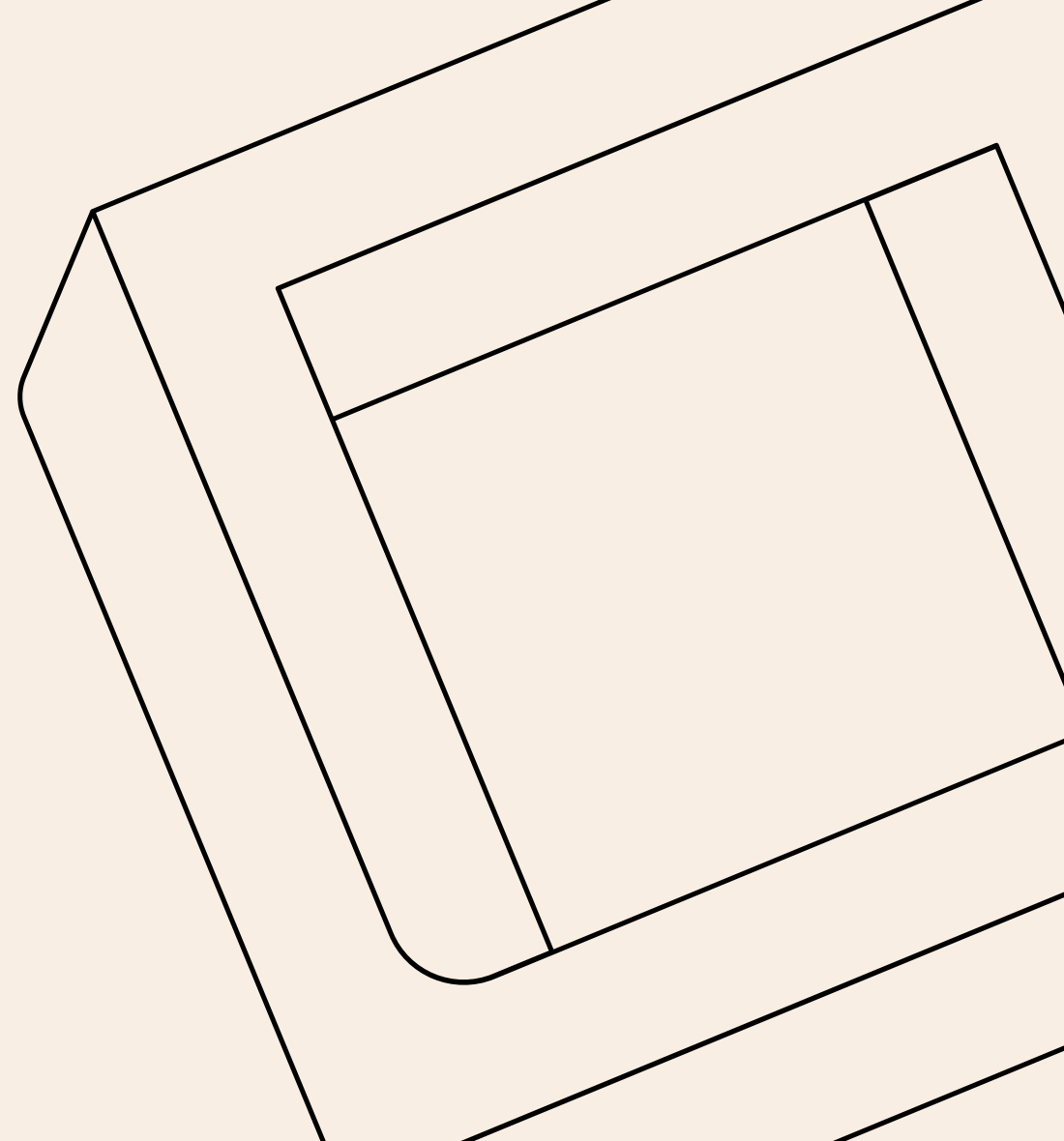


02

Please use the Q&A function to ask any questions
– all questions will be captured and sent to the presenters

Le Centre Verian sur le Futur de l'Europe

*Verian's internal think tank on topics related to Europe
and the European Union*



Our main data source: The Eurobarometer

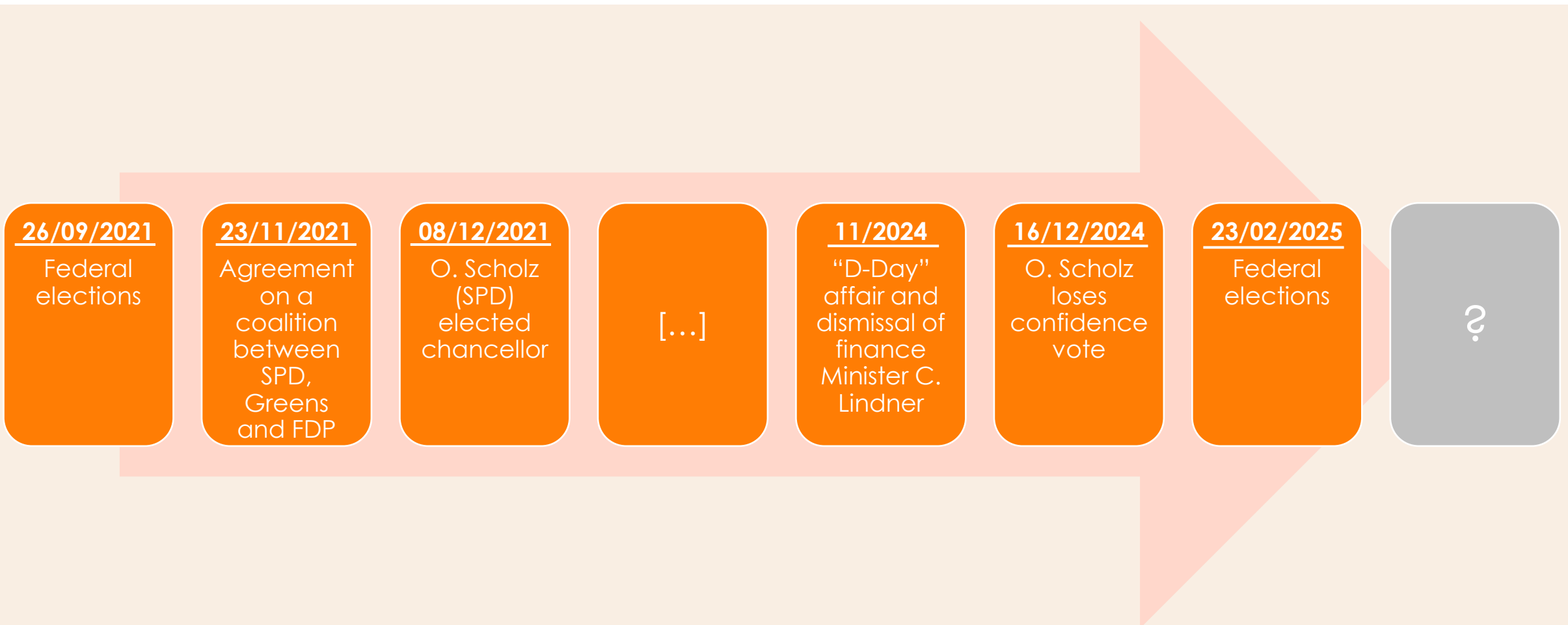
The social survey of reference to analyse public opinion in Europe



Eurobarometer is the polling instrument used by the European Commission, the European Parliament and other EU institutions and agencies to regularly **monitor the state of public opinion in Europe** on issues related to the European Union as well as attitudes on subjects of political or social nature.

Disclaimer: The Eurobarometer surveys are conducted under a contract with the European Commission, the European Parliament and other EU institutions. The views expressed in this presentation are solely ours.

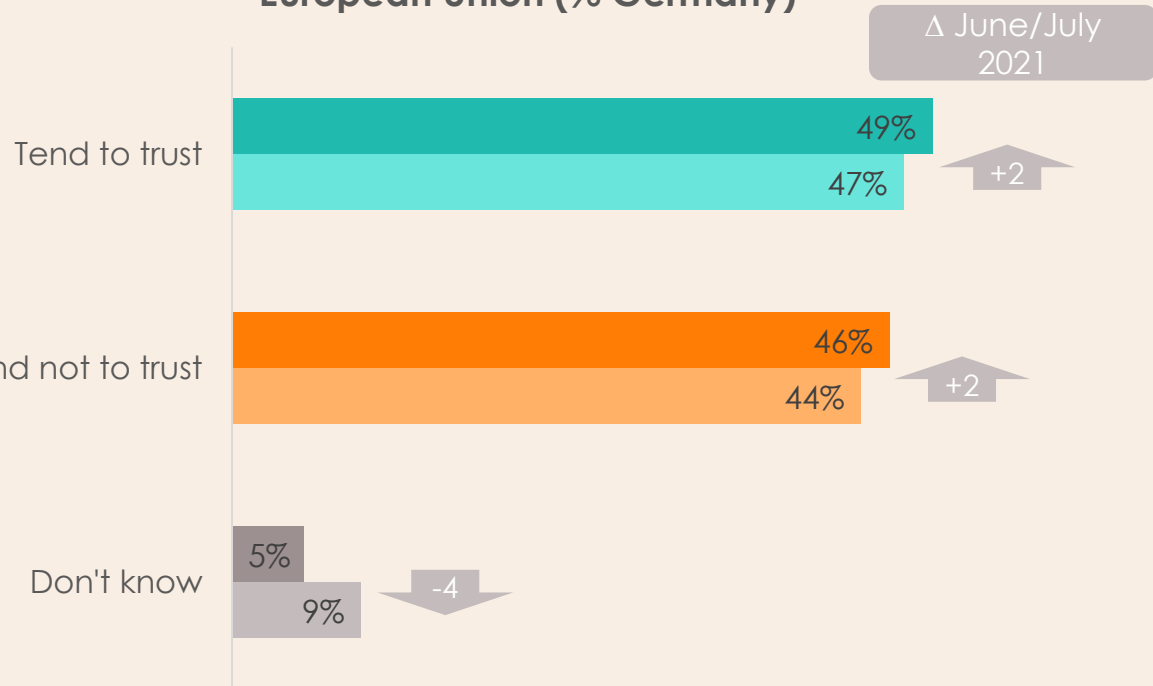
2025 German federal election - A brief timeline



1. Current perceptions of the EU and its institutions

Trust in the EU

QA6.8. How much trust do you have in certain institutions? For each of the following institutions, do you tend to trust it or tend not to trust it? The European Union (% Germany)



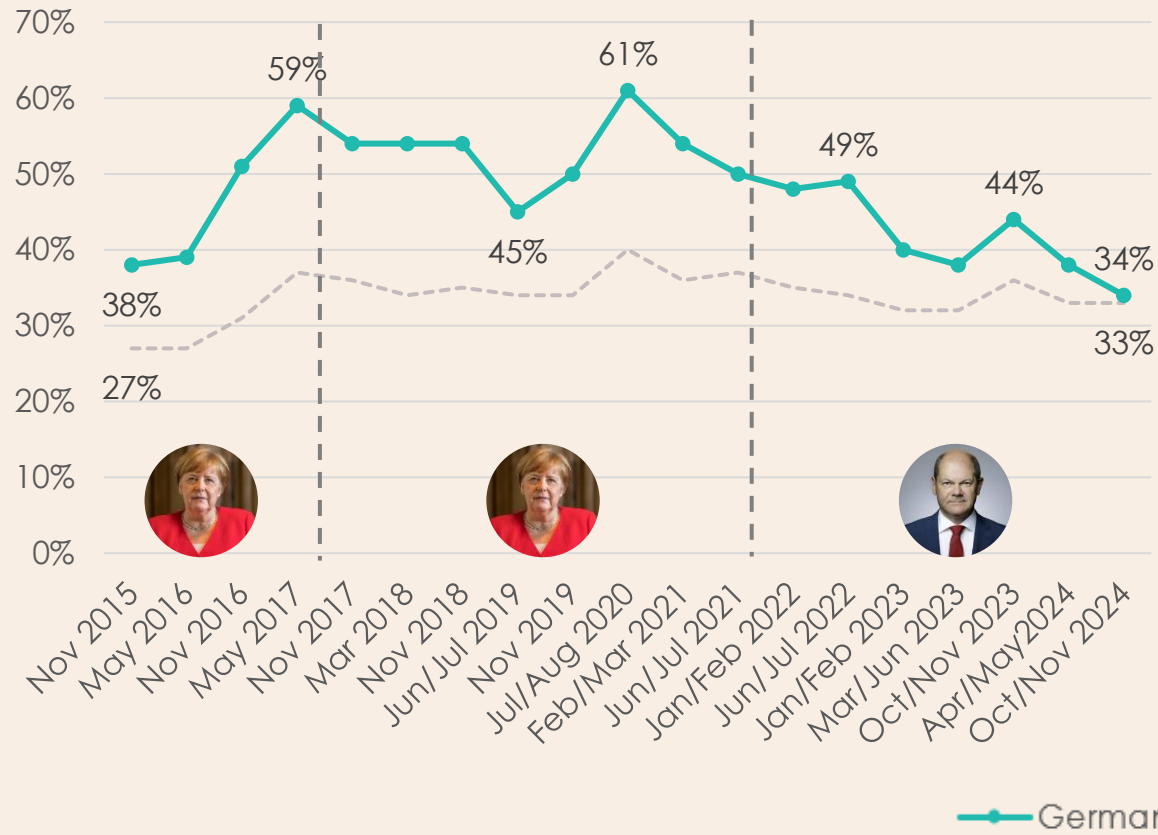
Compared to the last federal elections in 2021, respondents in Germany remain divided in their trust in the EU



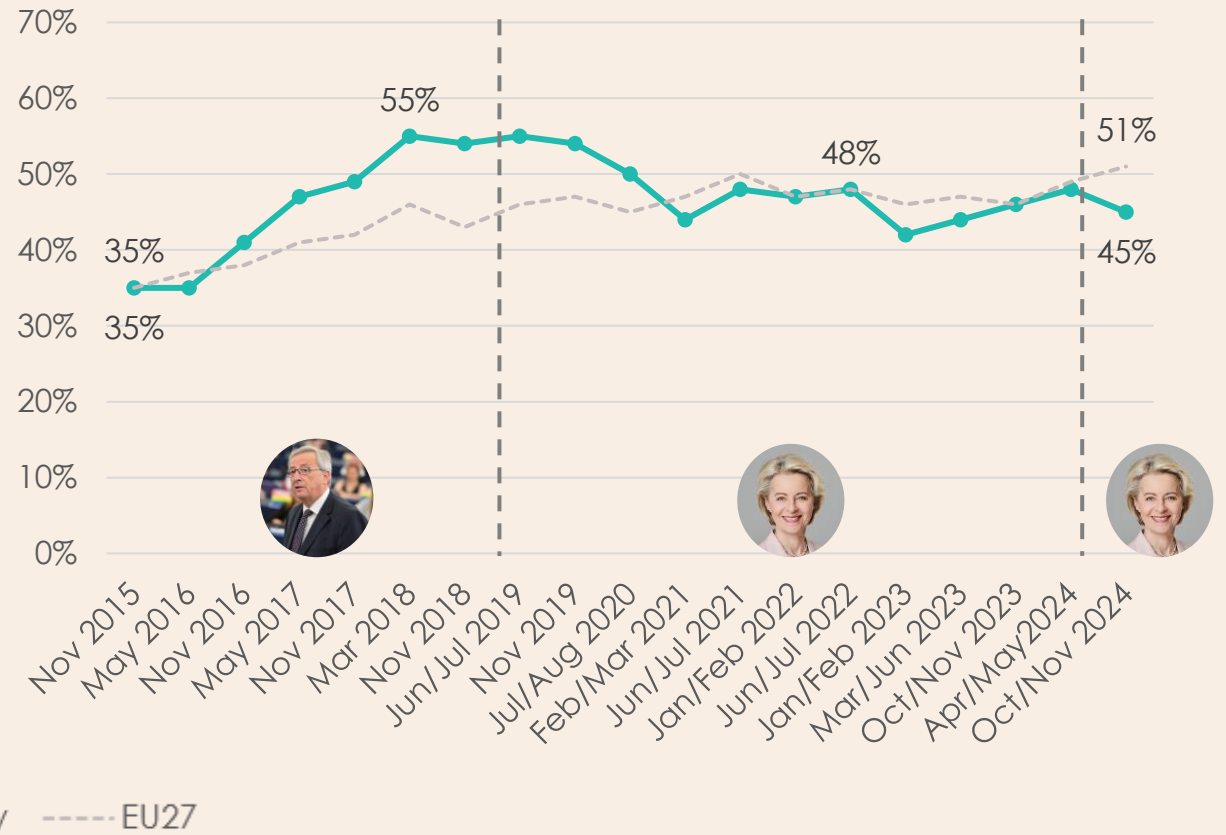
In the same time span, the share holding a positive image of the EU has decreased by 8 pp

Trust in political institutions

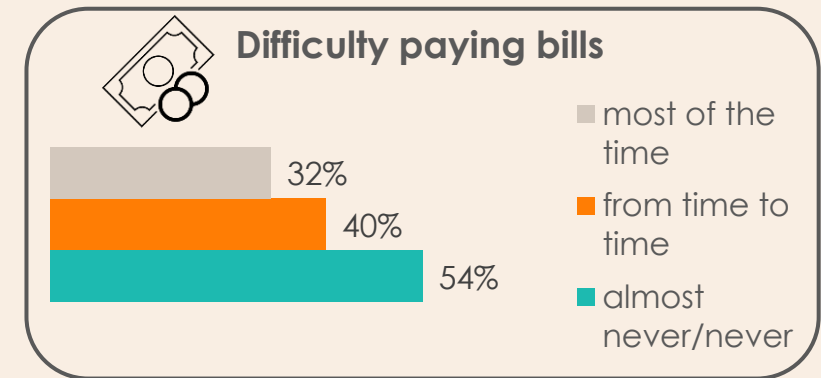
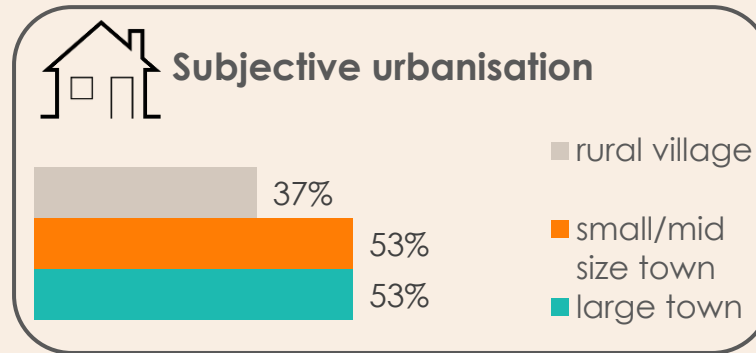
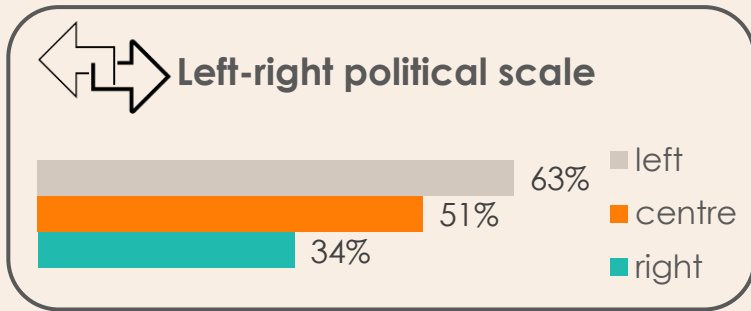
QA6.6 Trust in the (NATIONALITY) government (% Germany & EU)



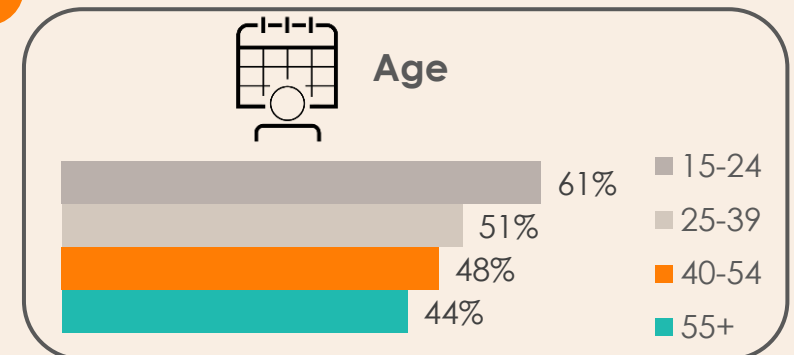
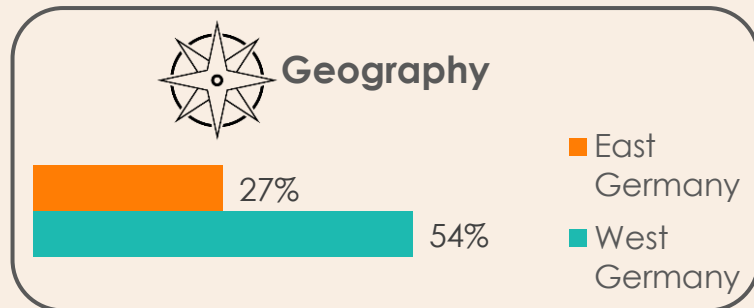
QA9.2 Trust in the European Commission (% Germany & EU)



Trust in the EU – Divisions within the German population



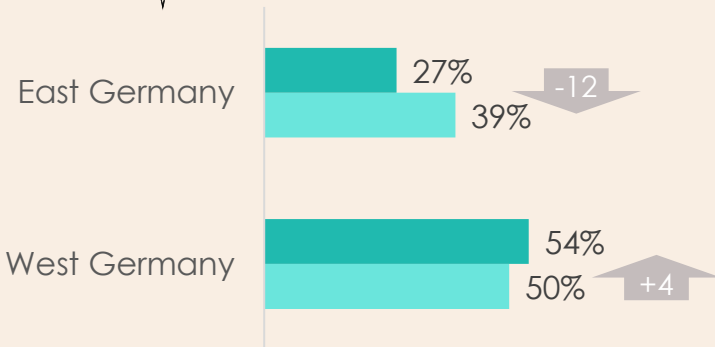
Significant divisions exist within the German population



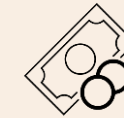
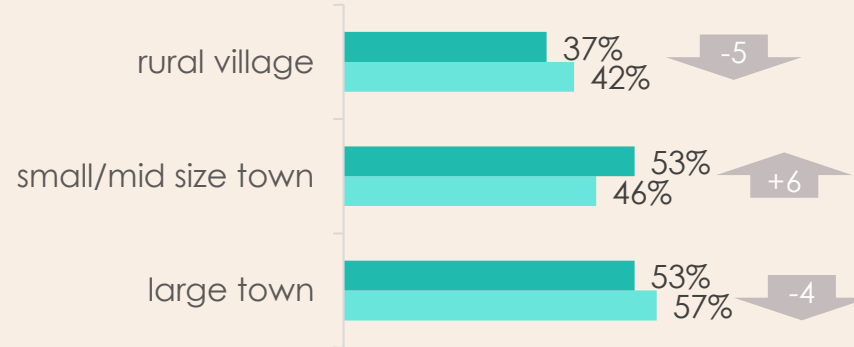
Trust in the EU – Divisions since the last federal elections



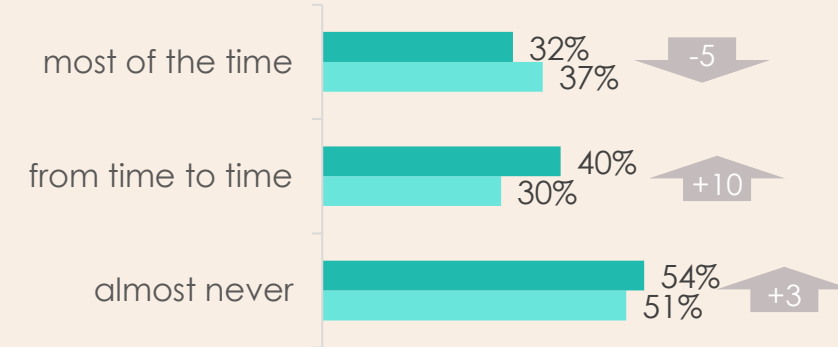
Geography



Subjective urbanisation



Difficulty paying bills



■ Oct/Nov 2024 ■ Jun/Jul 2021

△ June/July 2021

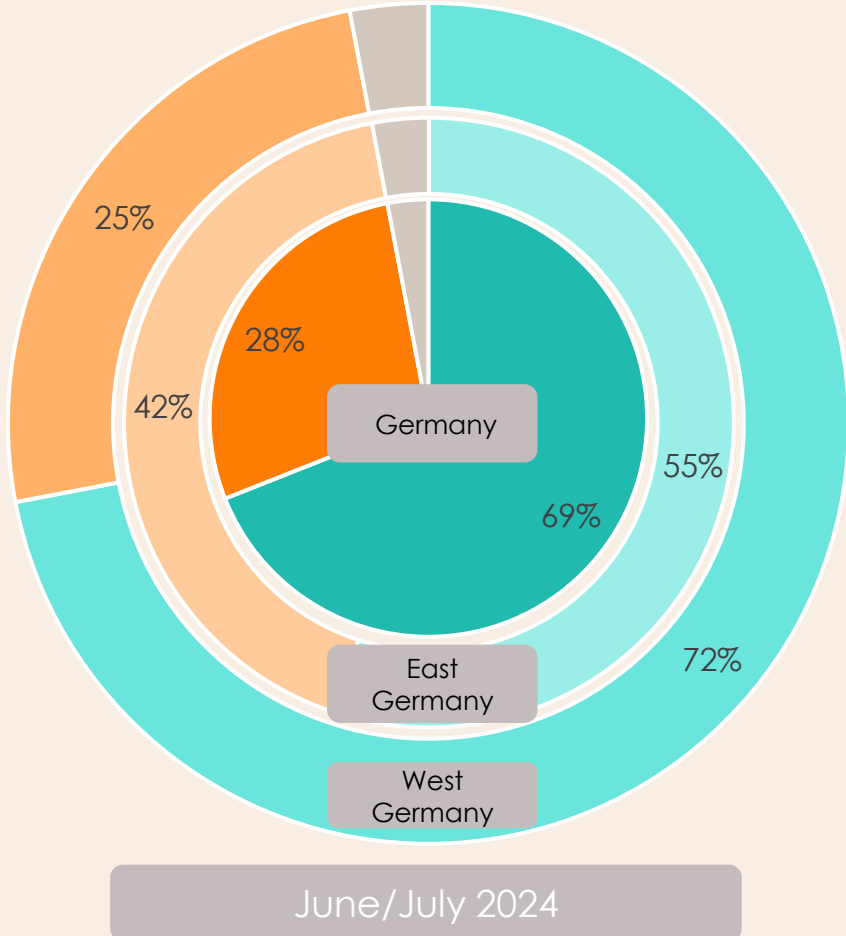
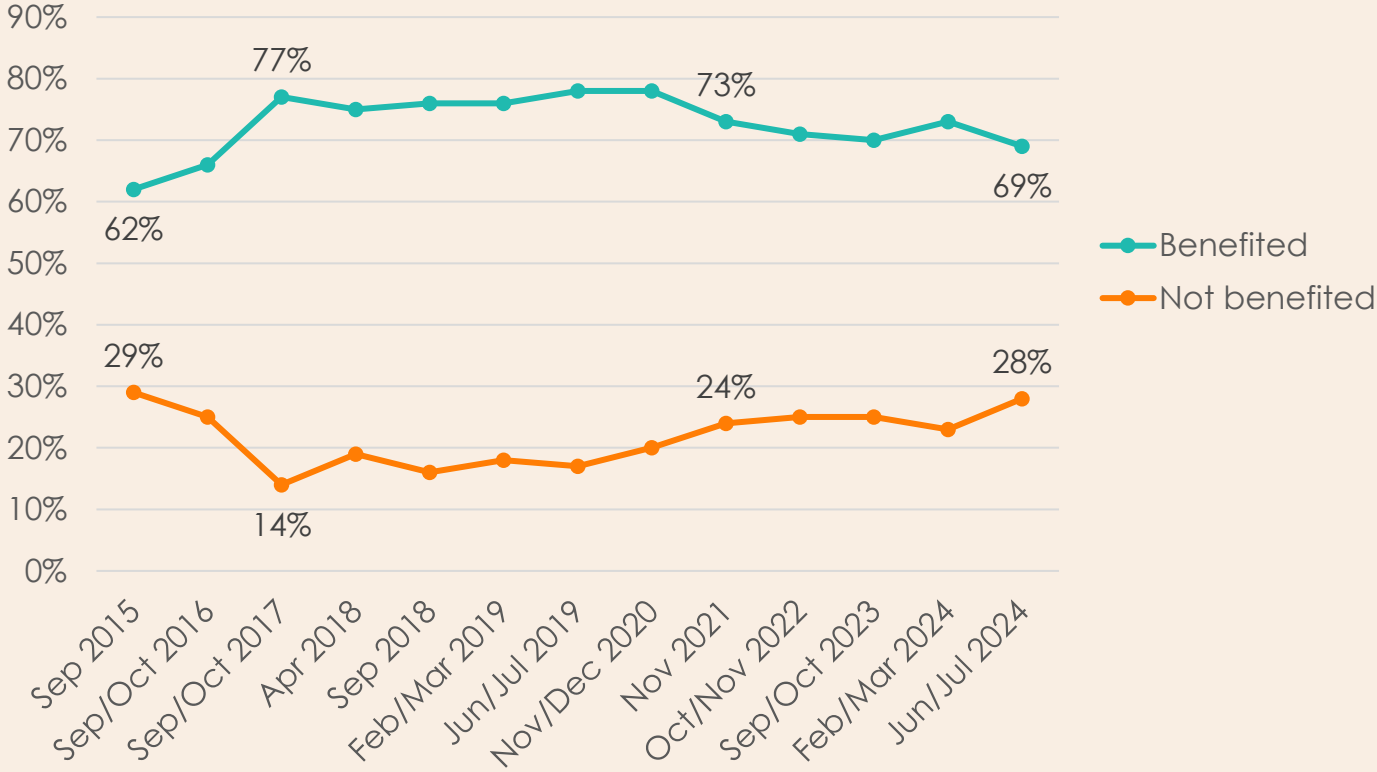


Increased geographical and economic polarisation since the last elections

2. Views on Germany's EU membership

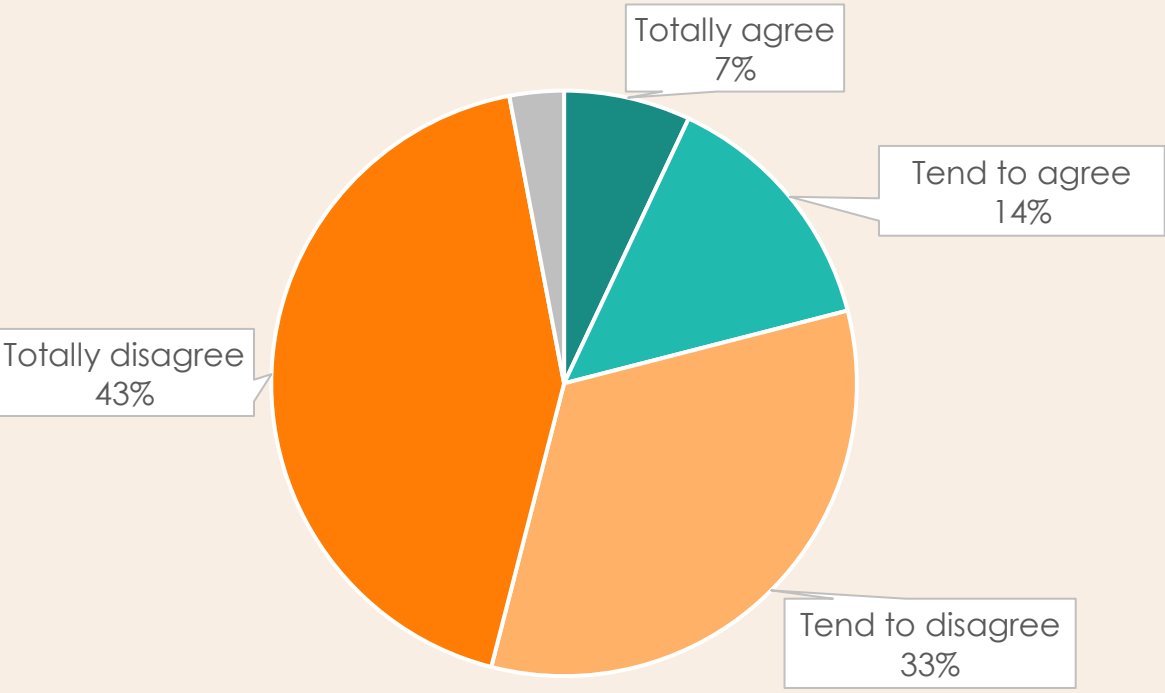
Perceived benefits of EU membership

QA19. Taking everything into account, would you say that Germany has on balance benefited or not from being a member of the EU?

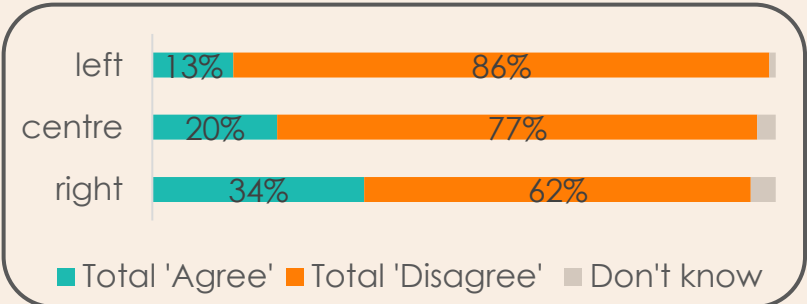


DEXIT - A future outside of the EU?

QA10.2. To what extent do you agree or disagree with each of the following statements? Germany could better face the future outside the EU



A majority of respondents in Germany across all socio-demographic groups **disagree** that Germany could better face the future outside the EU

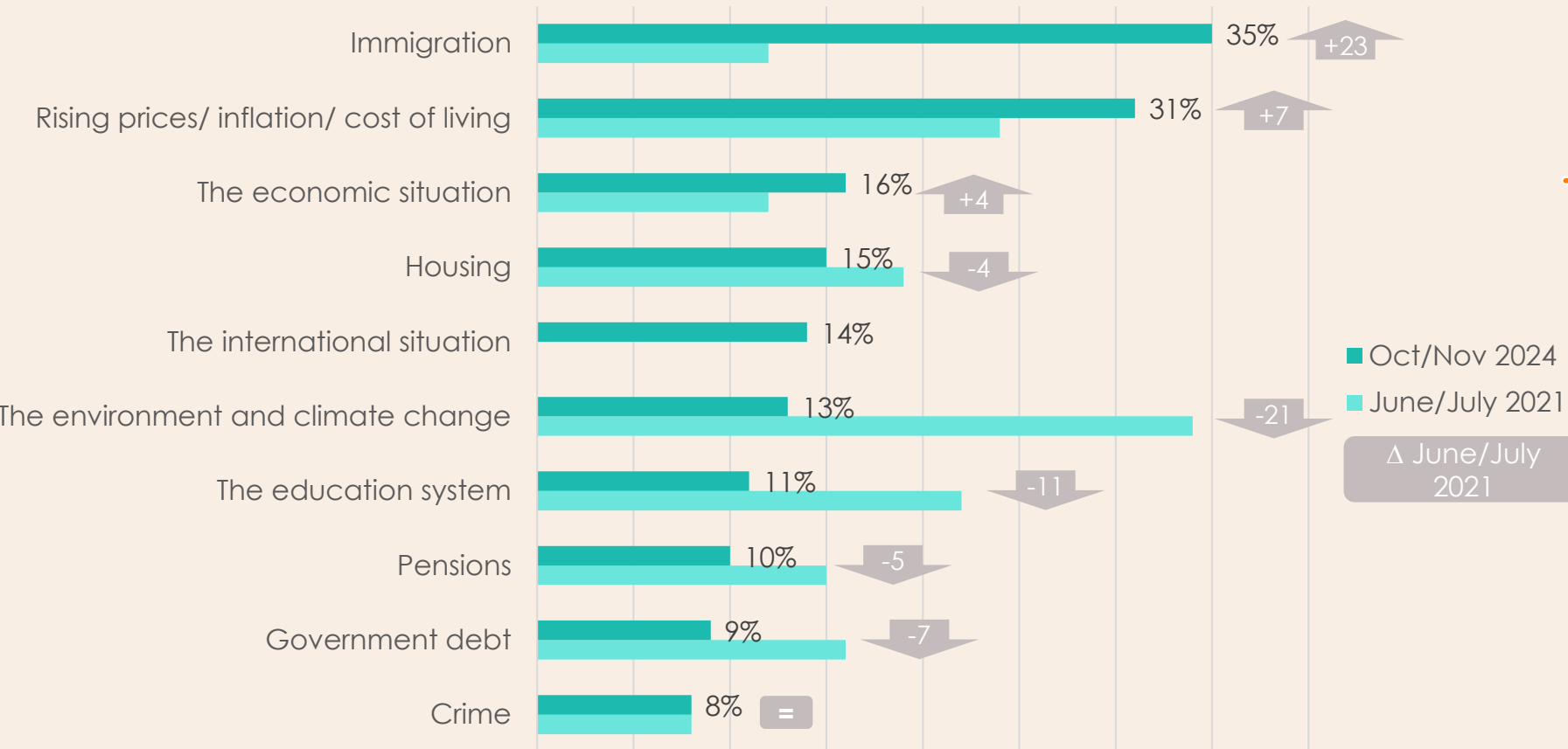


3. Polarising issues: national concerns

Polarising issues – National concerns

Significant changes since the last elections

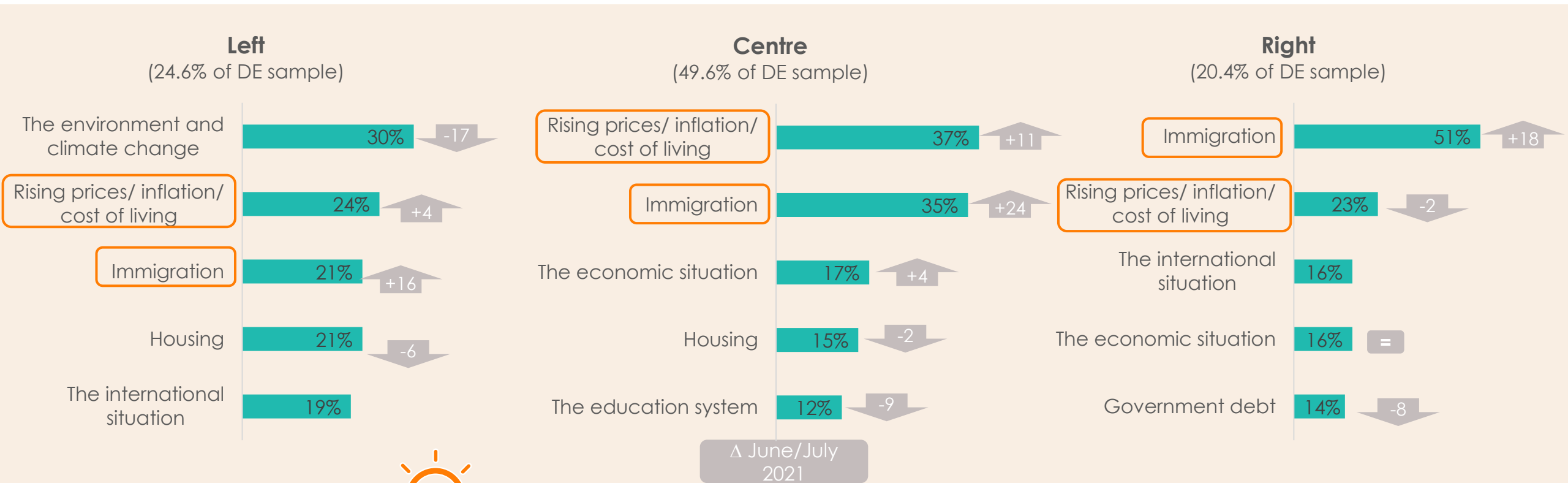
QA3. What do you think are the two most important issues facing Germany at the moment?



Immigration and socioeconomic concerns dominate respondents' concerns in Germany

Polarising issues – National concerns

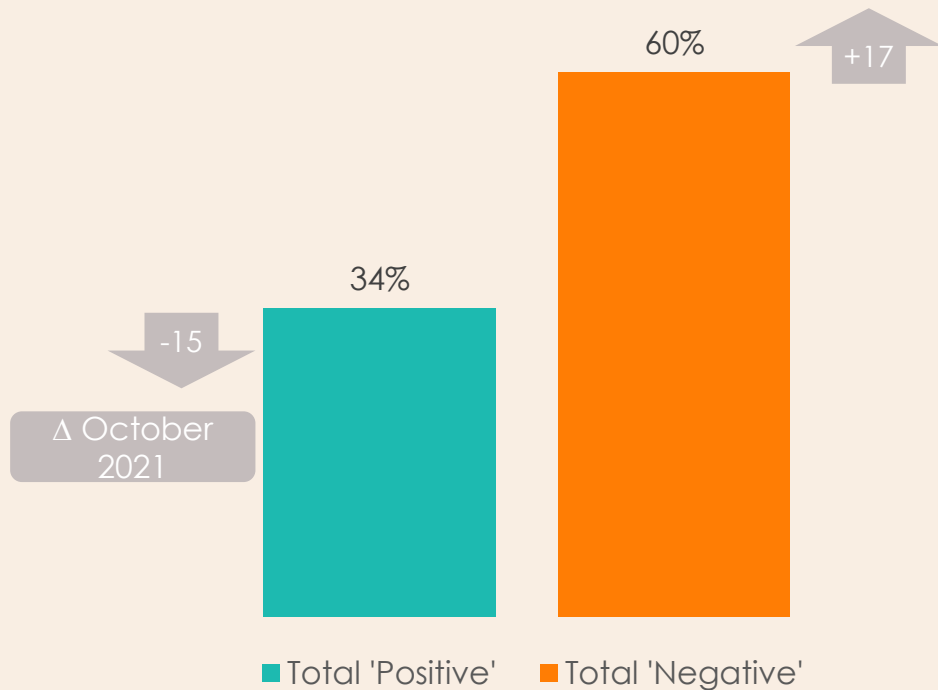
A left-right divide?



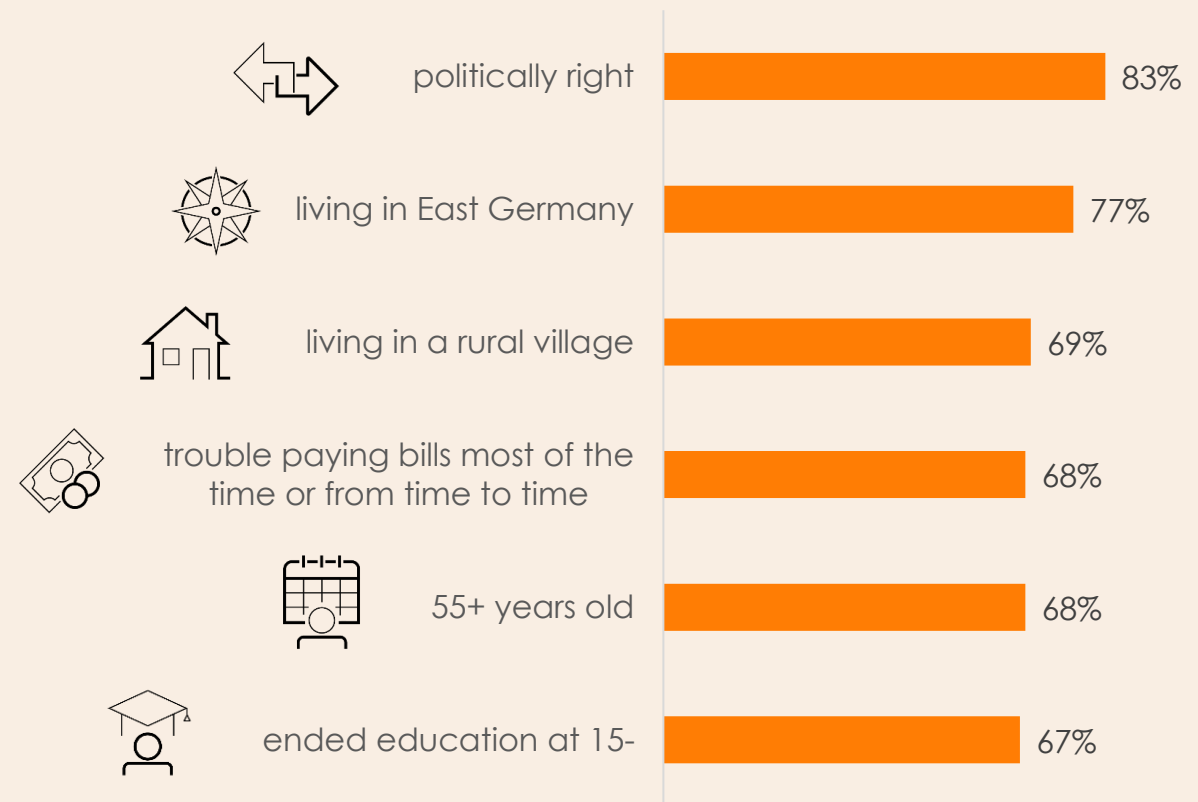
Immigration and rising prices/ inflation/ cost of living are the only items that rank in the top 5 for all groups

Polarising issues - Migration

QB4.2. Please tell whether each of the following statements evokes a positive or negative feeling for you. Immigration of people from outside the EU (% Germany)

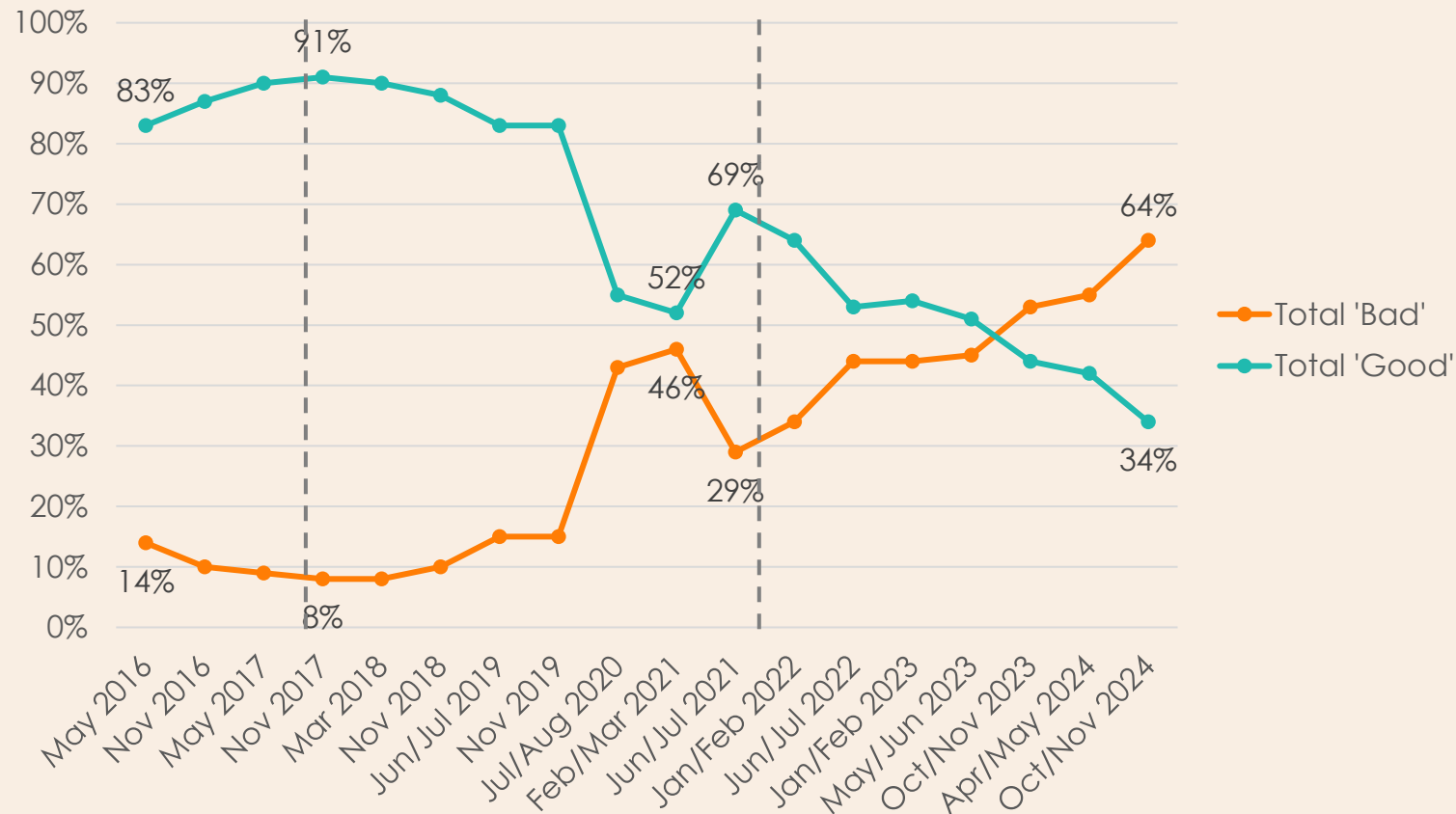


% Total 'Negative' among socio-demographic groups



Polarising issues – Socioeconomic situation

QA1.2. How would you judge the current situation in each of the following? The situation of the German economy



EU27 ranking (Total 'Good')

June/July 2021	October/November 2024
1. Luxembourg (89%)	1. Denmark (87%)
2. The Netherlands (87%)	2. Luxembourg (86%)
...	...
5. Germany (69%)	16. Germany (34%)
...	...
26. Portugal (11%)	26. France (15%)
27. Greece (9%)	27. Greece (14%)

Election Talk: 2025 German Federal Election

Findings from the latest national polls



- 1. Background: Electoral system & coalitions**
2. Main trends in German public opinion
3. Latest Poll: Ahead of the German Federal Election

German Electoral System

Personalized proportional representation

- Two votes:



No. 1 for candidate in constituency



No. 2 for party list

Stimmzettel

für die Wahl zum Deutschen Bundestag am 23. Februar 2025
im Wahlkreis 26 Friesland – Wilhelmshaven – Wittmund

Sie haben 2 Stimmen

hier 1 Stimme
für die Wahl
einer Wahlkreisbewerberin/
eines Wahlkreisbewerbers

Erststimme

hier 1 Stimme
für die Wahl
einer Landesliste (Partei)
– maßgebende Stimme für die Verteilung der Sitze
insgesamt auf die einzelnen Parteien –

Zweitstimme

1	Möller, Siemtje <small>Lehrerin Varel</small>	SPD <small>Sozialdemokratische Partei Deutschlands</small>	<input type="radio"/>
2	Janssen, Anne <small>Bundestagsabgeordnete Wittmund</small>	CDU <small>Christlich Demokratische Union Deutschlands in Niedersachsen</small>	<input type="radio"/>
3	Maus, Ulrike <small>Psychologische Psychotherapeutin Moorweg</small>	GRÜNE <small>BÜNDNIS 90/DIE GRÜNEN</small>	<input type="radio"/>
4	Wegener, Robert <small>Studienrat Wilhelmshaven</small>	FDP <small>Freie Demokratische Partei</small>	<input type="radio"/>
5	Sichert, Martin <small>Dipl.-Kaufmann Zetel</small>	AfD <small>Alternative für Deutschland</small>	<input type="radio"/>
6	Janßen, Vincent <small>Schüler Wilhelmshaven</small>	Die Linke <small>Die Linke</small>	<input type="radio"/>
			<input type="radio"/>

<input type="radio"/>	SPD	Sozialdemokratische Partei Deutschlands <small>Lars Klingbeil, Siemtje Möller, Boris Pistorius, Anja Troff-Schaffarzyk, Wolfgang-Hubertus Heil</small>	1
<input type="radio"/>	CDU	Christlich Demokratische Union Deutschlands in Niedersachsen <small>Dr. Mathias Middelberg, Gitta Connemann, Dr. Hendrik Hoppenstedt, Anne Janssen, Fritz Güntzler</small>	2
<input type="radio"/>	GRÜNE	BÜNDNIS 90/DIE GRÜNEN <small>Filiz Polat, Helge Limburg, Dr. Julia Verlinden, Swantje Michaelsen, Dr. Lena Gumlior</small>	3
<input type="radio"/>	FDP	Freie Demokratische Partei <small>Christian Dür, Konstantin Kuhle, Anja Schultz, Dr. Gero Clemens Hocker, Robert Reinhardt-Klein</small>	4
<input type="radio"/>	AfD	Alternative für Deutschland <small>Dirk Brandes, Jörn König, Martin Sichert, Danny Meiners, Angela Rudzka</small>	5
<input type="radio"/>	Die Linke	Die Linke <small>Heidi Reichennek, Cem Ince, Maren Kaminski, Maik Brückner, Anne-Mieke Bremer</small>	6
		PARTEI MENSCH UMWELT	

German Electoral System

Personalized proportional representation

- Fixed number of 630 seats, distribution according proportional representation based on the second vote
- No overhang and compensatory mandates (new electoral law)
- Winning candidate in constituency has no guarantee to enter the Bundestag
- 5% threshold or 3 direct seats



299
constituencies

Germany: Country of Coalitions

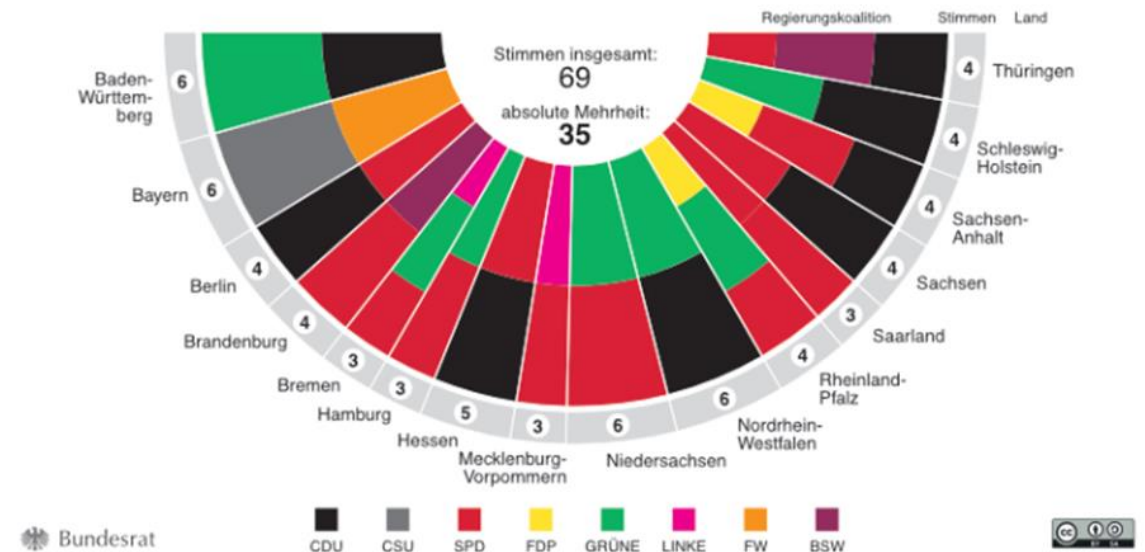
Differentiated political landscape



- Since 1949 a coalition government was formed after each Bundestag election
- Until the collapse in Nov 2024, the 'traffic light coalition' was the first real three-party-coalition on a national level

Die Zusammensetzung des Bundesrates

seit 18. Dezember 2024

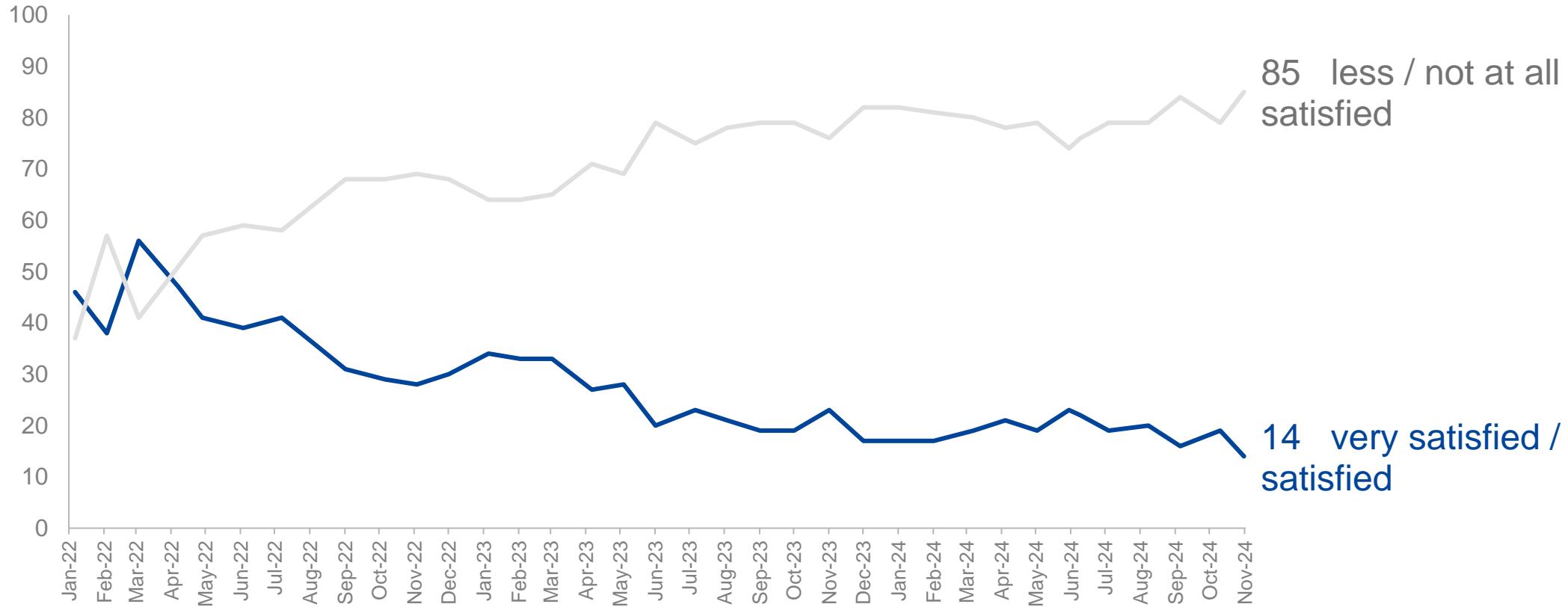


- Overall 11 different government coalitions in 16 states
- 1 single party government (Saarland), 11 two-party coalitions, 4 three-party coalitions

1. Background: Electoral system & coalitions
2. **Main trends in German public opinion**
3. Latest Poll: Ahead of the German Federal Election

Satisfaction with the federal government

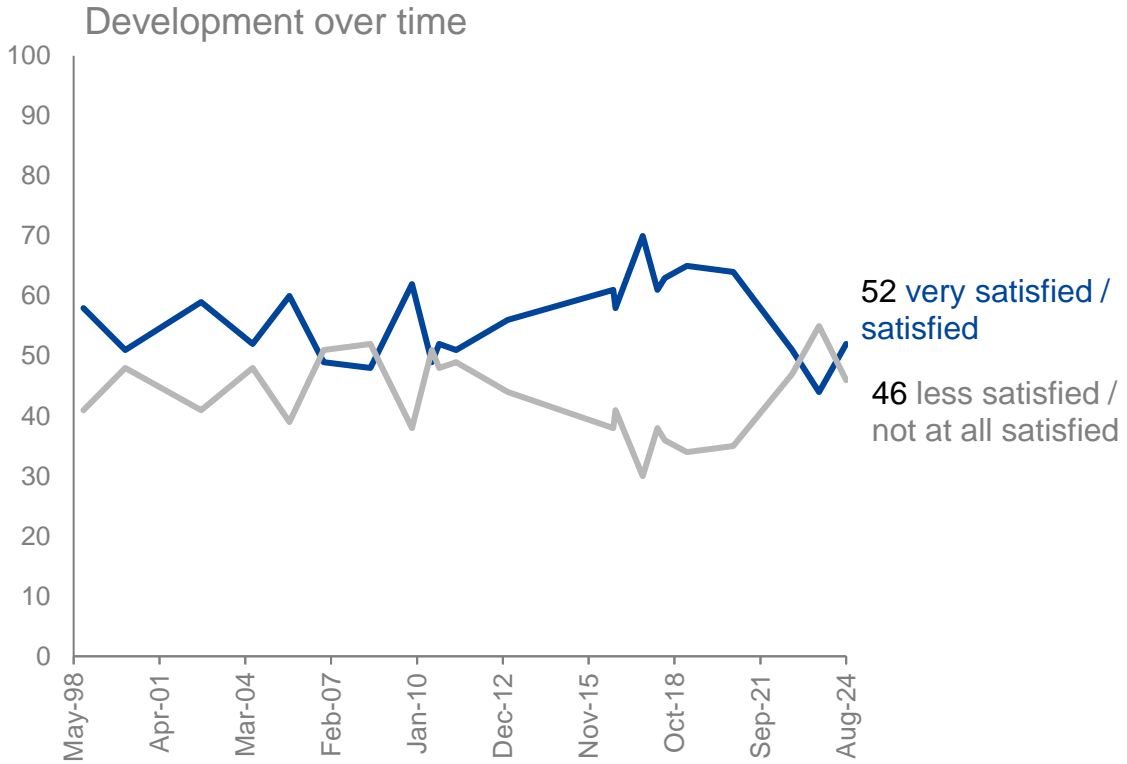
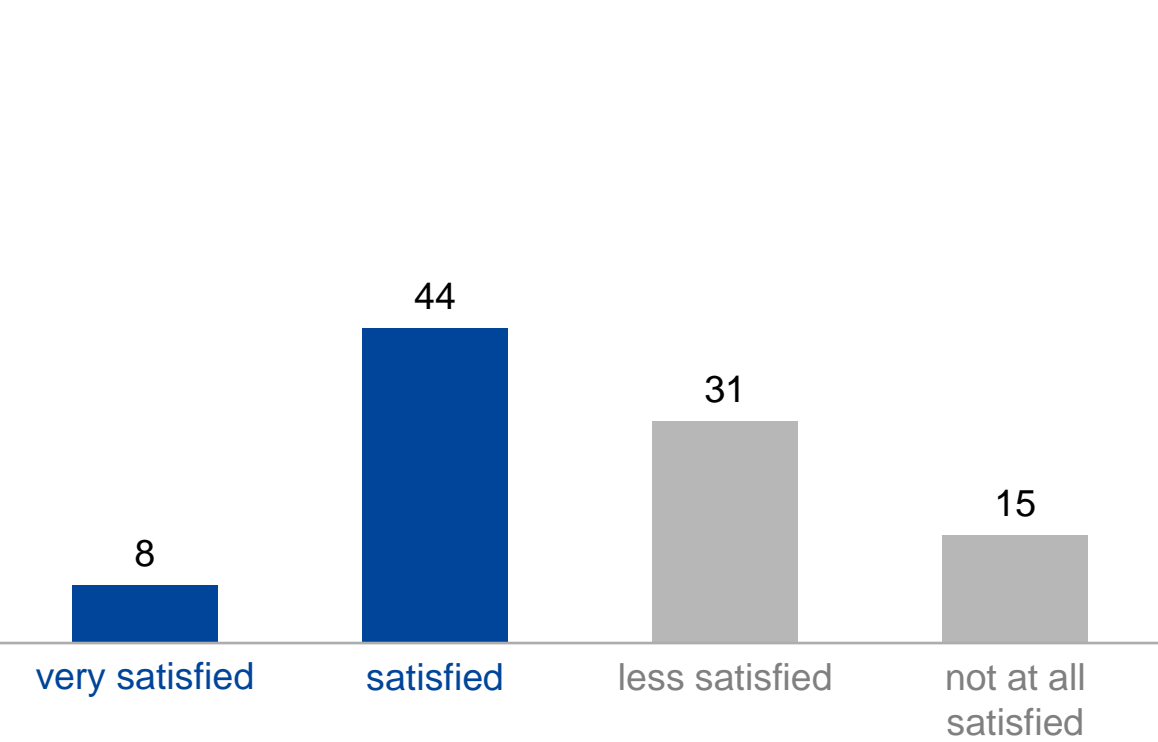
Development over time until break-up of the 'traffic light coalition'



How satisfied are you with the work of the federal government? (Source: ARD-DeutschlandTREND, Oct 2025 II)

Population: Eligible voters in Germany
Values in percent
Missing values to 100 per cent: Don't know / no answer

Satisfaction with the practice of democracy



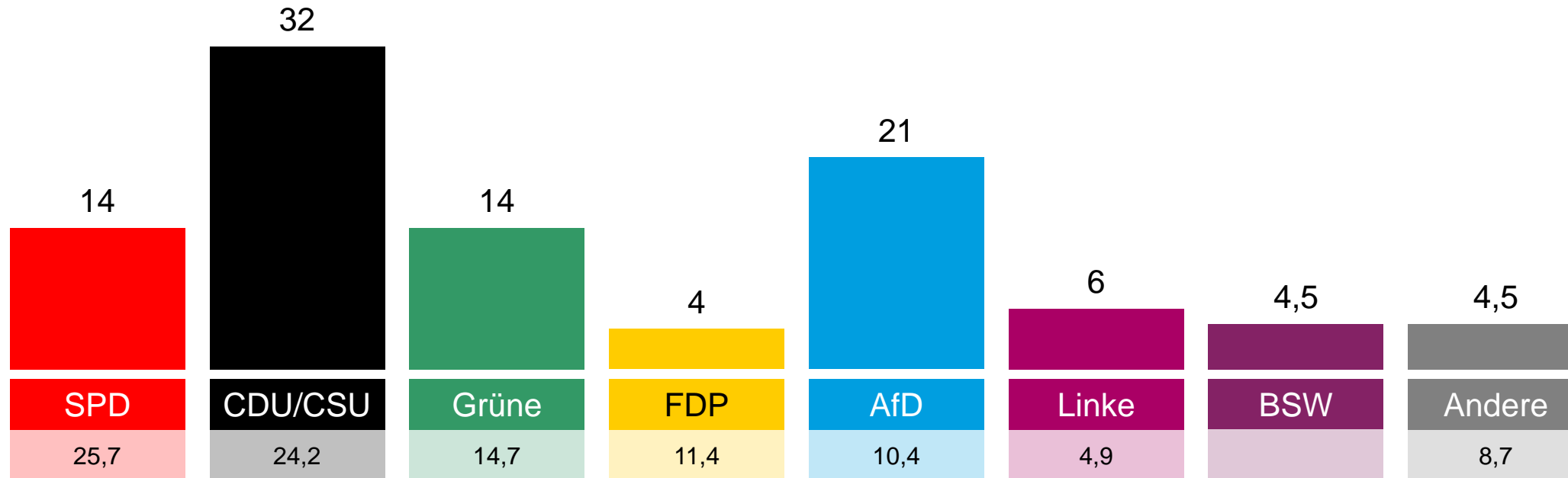
All in all, how satisfied are you with the way democracy works in the Federal Republic of Germany? (Source: Machen wir unsere Demokratie kaputt?, Aug 2024)

Population: Eligible voters in Germany
 Values in percent
 Missing values to 100 per cent: Don't know / no answer

1. Background: Electoral system & coalitions
2. Main trends in German public opinion
3. **Latest Poll: Ahead of the German Federal Election**

Latest poll for the Bundestag election

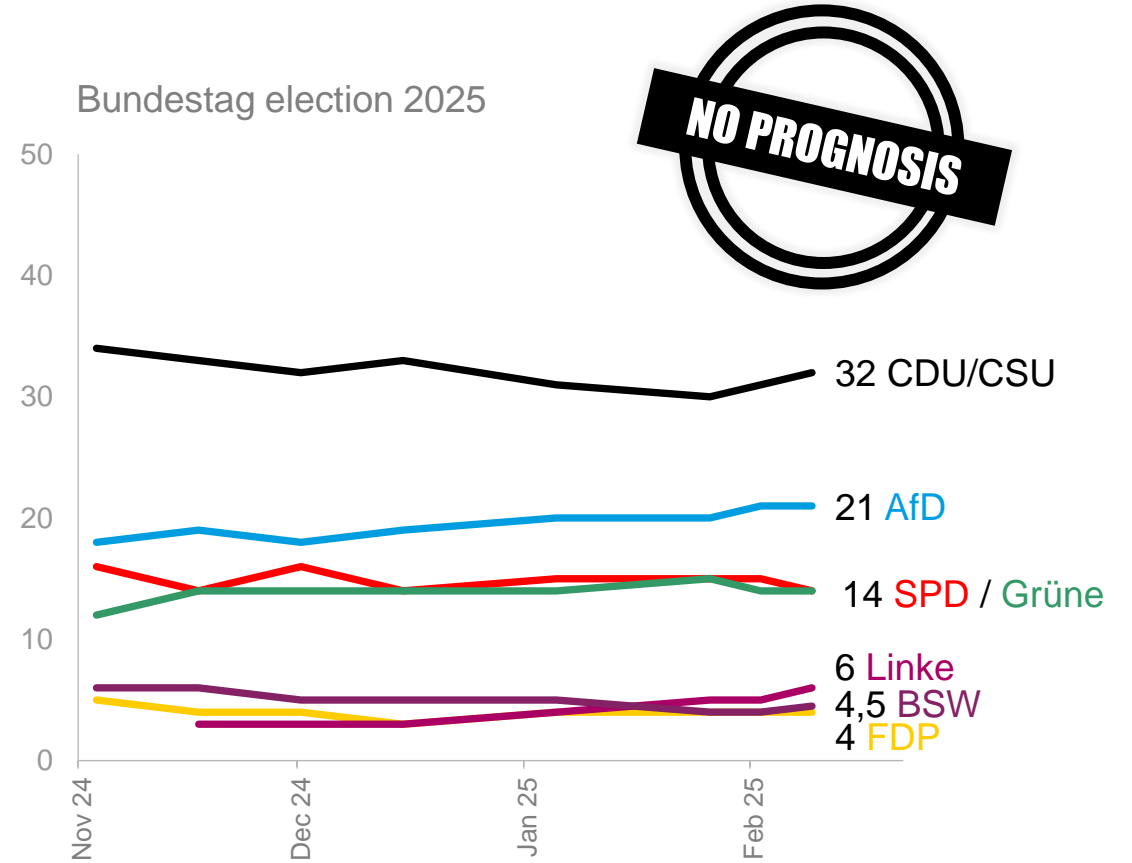
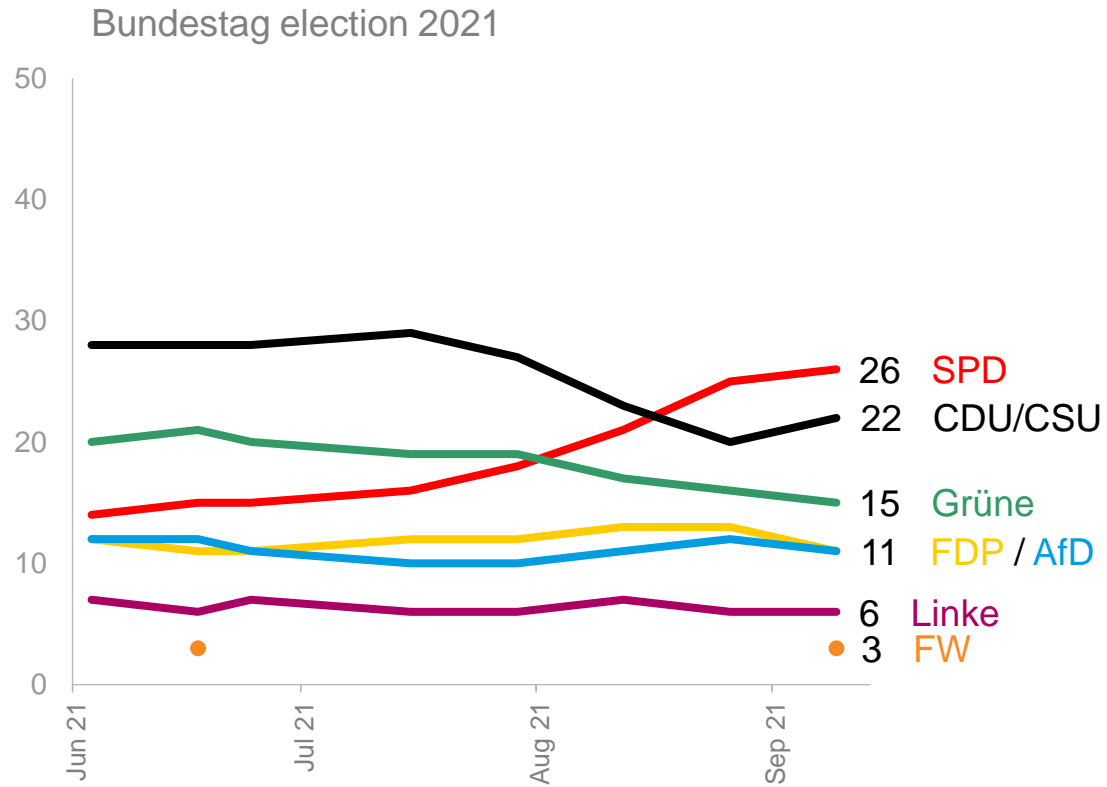
Compared to the results of the 2021 Bundestag election



Which party would you vote for if there were Bundestag elections next Sunday? (Source: ARD-DeutschlandTREND, Feb 2025 II)

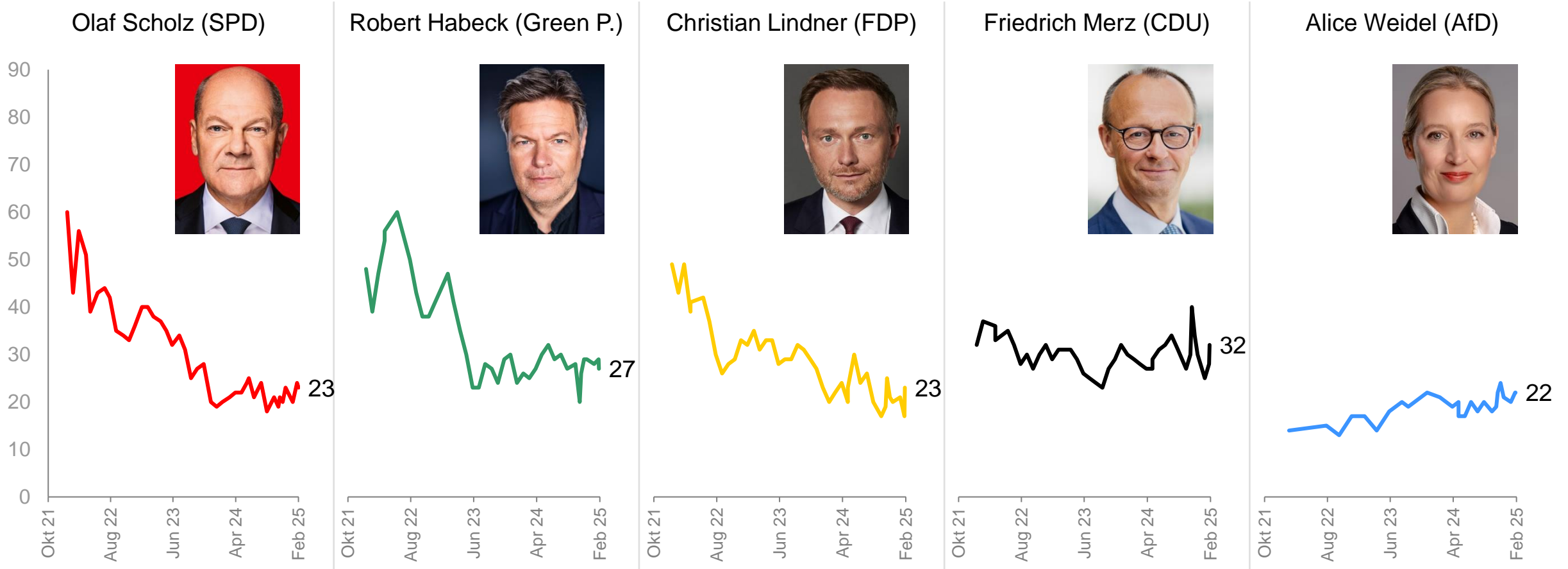
Population: Eligible voters in Germany, the order of the parties corresponds to the result of the last Bundestag election
Values in percent, lower values: Results of the 2021 Bundestag election (including a rerun in parts of Berlin in 2024)

Polls in the run-up to the last and upcoming federal elections



Which party would you vote for if there were Bundestag elections next Sunday? (Source: ARD-DeutschlandTREND, Feb 2025 II)

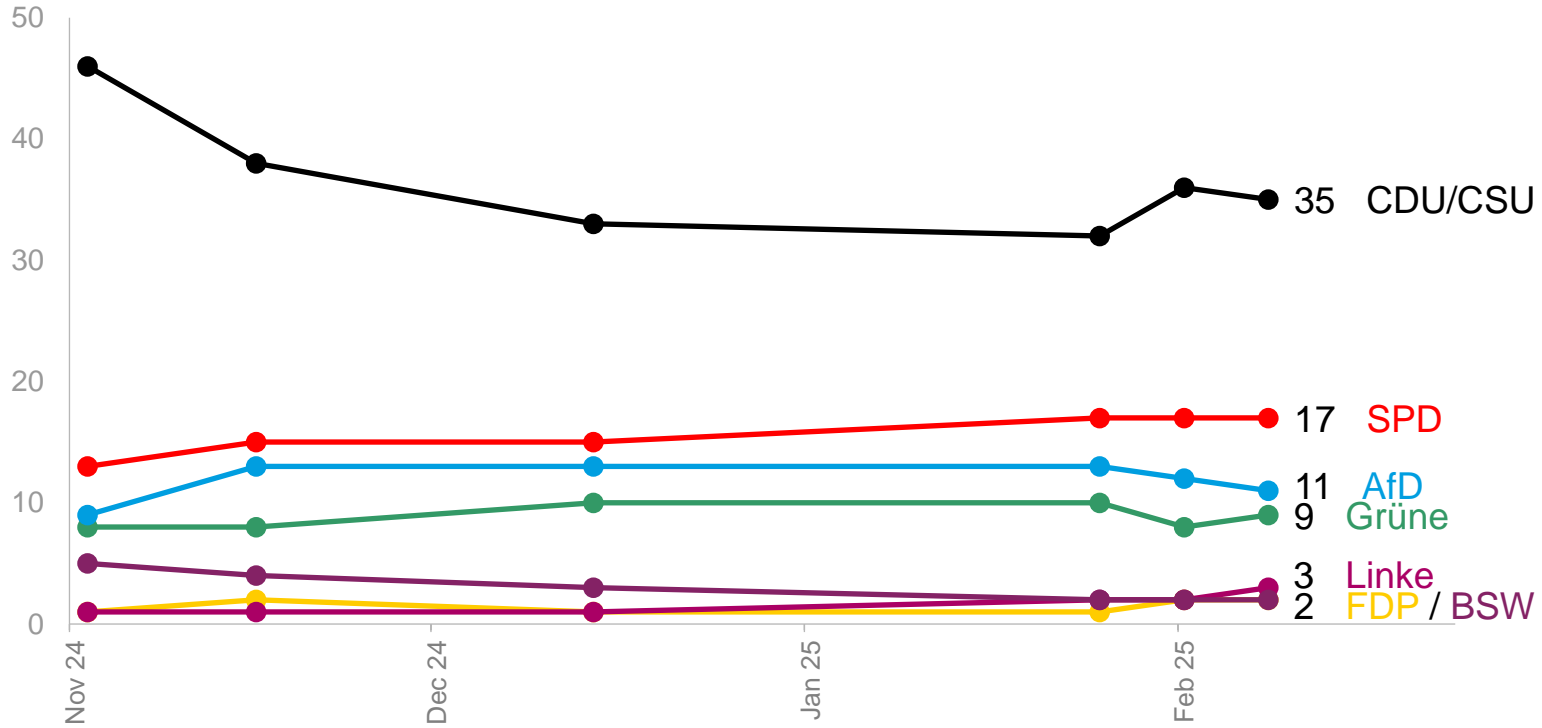
Politician satisfaction development over time *very satisfied / satisfied*



Are you satisfied with the political work of ...? (Source: ARD-DeutschlandTREND, Feb 2025 I)

Population: Eligible voters in Germany
 Values in percent
 Missing values at 100 per cent: Less satisfied / not at all satisfied / don't know / no answer

Leadership of the next German government



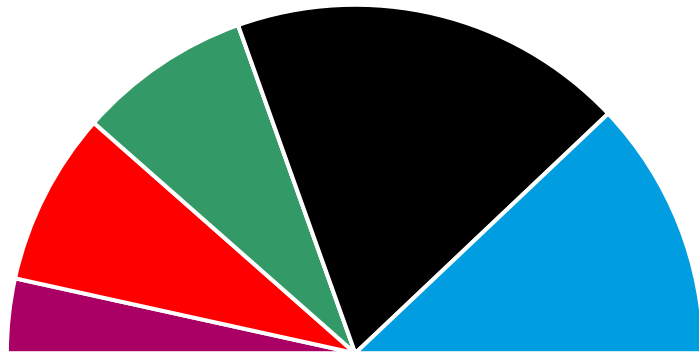
When you think about the time after the federal elections on 23 February: Which party should lead the next federal government? (Source: ARD-DeutschlandTREND, Feb 2025 II)

Population: Eligible voters in Germany
 Values in percent
 Missing values to 100 per cent: Other party / don't know / no answer

Possible scenarios after the elections

Scenario I

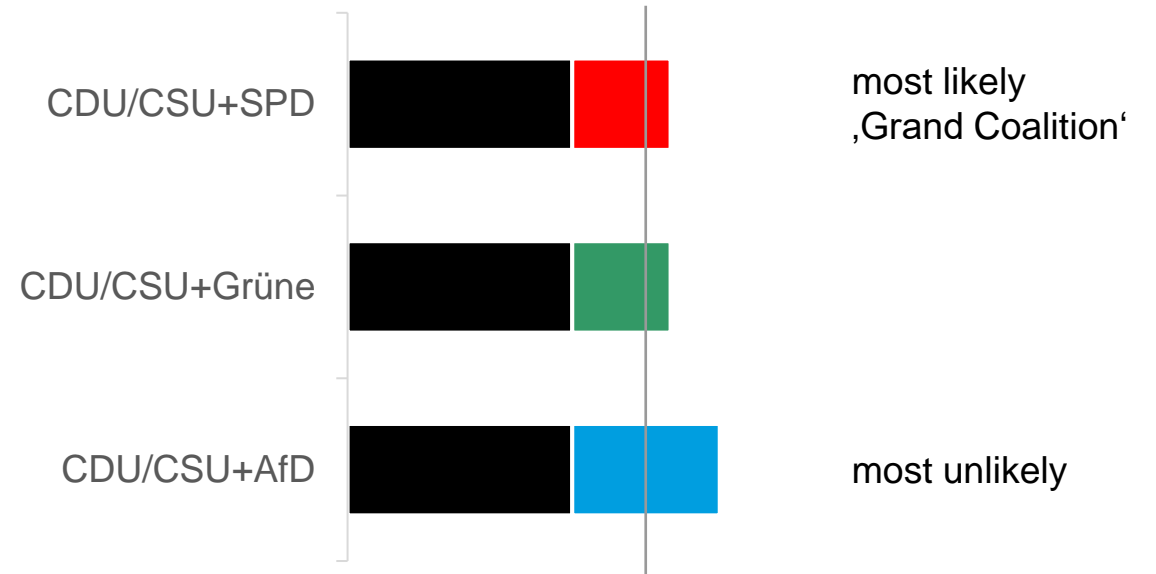
- Results correspond exactly to the latest poll
- 5 parties with more than 5%



SPD	CDU/ CSU	Grüne	FDP	AfD	Linke	BSW	Others
14	32	14	4	21	6	4,5	4,5

➔ Majority with over 43,5%

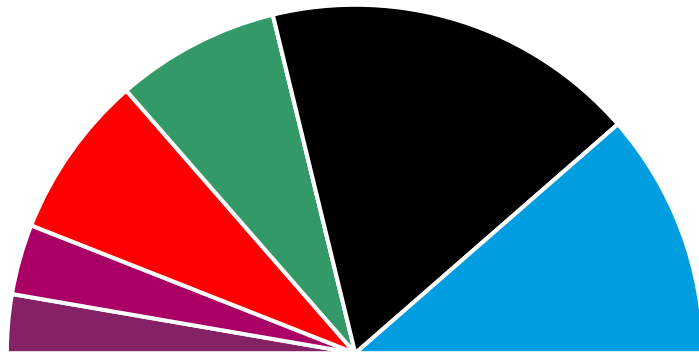
- Different two-party coalitions possible



Possible scenarios after the elections

Scenario II

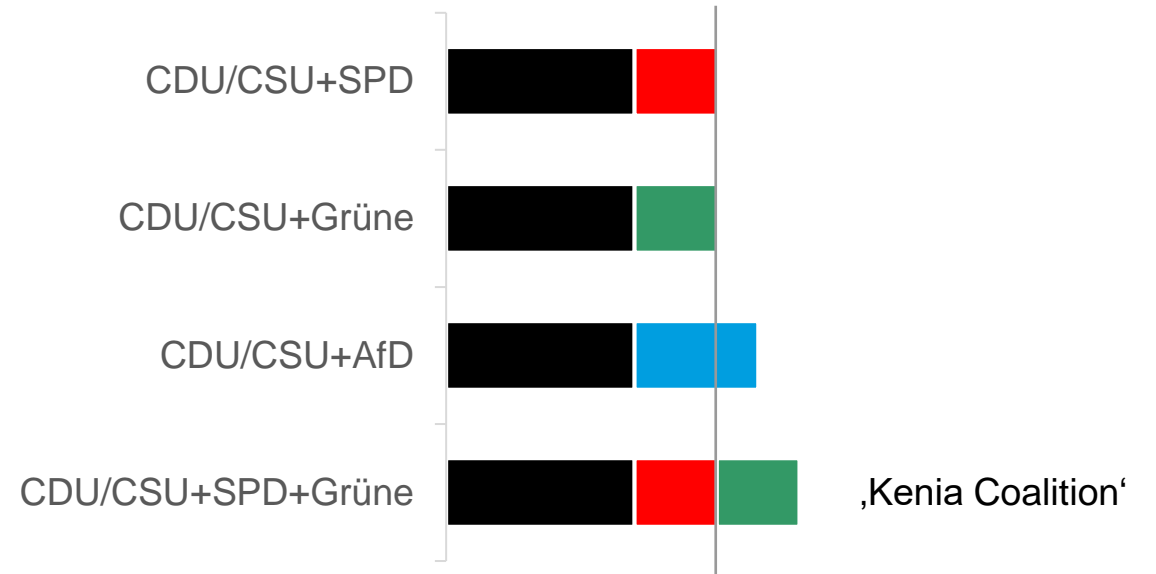
- Linke and BSW reach at least 5%
- 6 parties with more than 5%
- Ratios would shift



SPD	CDU/ CSU	Grüne	FDP	AfD	Linke	BSW	Others
14	32	14	4	21	6	5	4

➔ Majority with over 46%

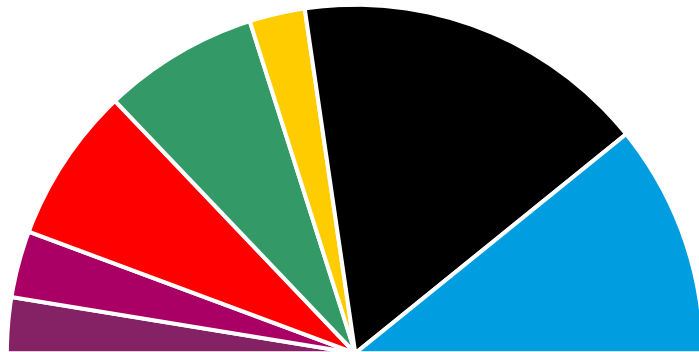
- Two-party coalition could be unlikely



Possible scenarios after the elections

Scenario III

- Linke, BSW and FDP reach at least 5%
- 7 parties with more than 5%
- Ratios would shift significantly



SPD	CDU/ CSU	Grüne	FDP	AfD	Linke	BSW	Others
14	32	14	5	21	6	5	3

➔ Majority with over 48,5%

- Two-party coalition would be unlikely

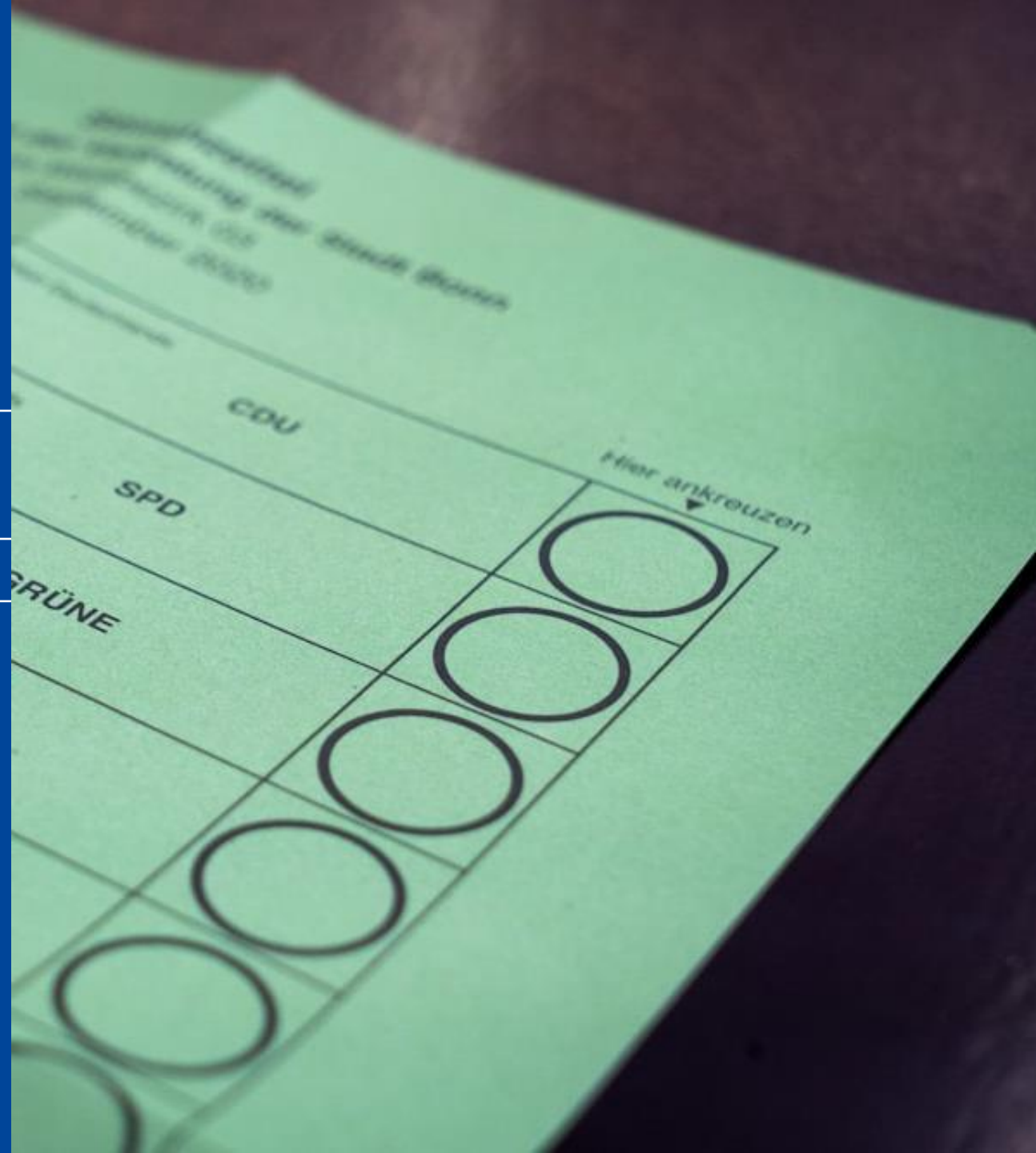


Key Take Aways

- The 2025 election in Germany is an election in times of crisis
- Different to previous elections, there is no single candidate with high popularity numbers
- As things stand today, the CDU/CSU is very likely to become strongest party
- A coalition of CDU/CSU and SPD seems currently the most likely outcome.
- But: There are three parties whose entry into the Bundestag is not certain. Linke, BSW and FDP could make a difference when it comes to forming the new government. If two or three of the smaller parties pass the 5% threshold, it is uncertain, if there is a majority for a two-party coalition
- Current polls suggest a shift to the right and it is expected, that AfD will get a very strong result. It seems highly unlikely for AfD to enter any coalition after the election, but AfD will most likely be the strongest opposition party in the Bundestag

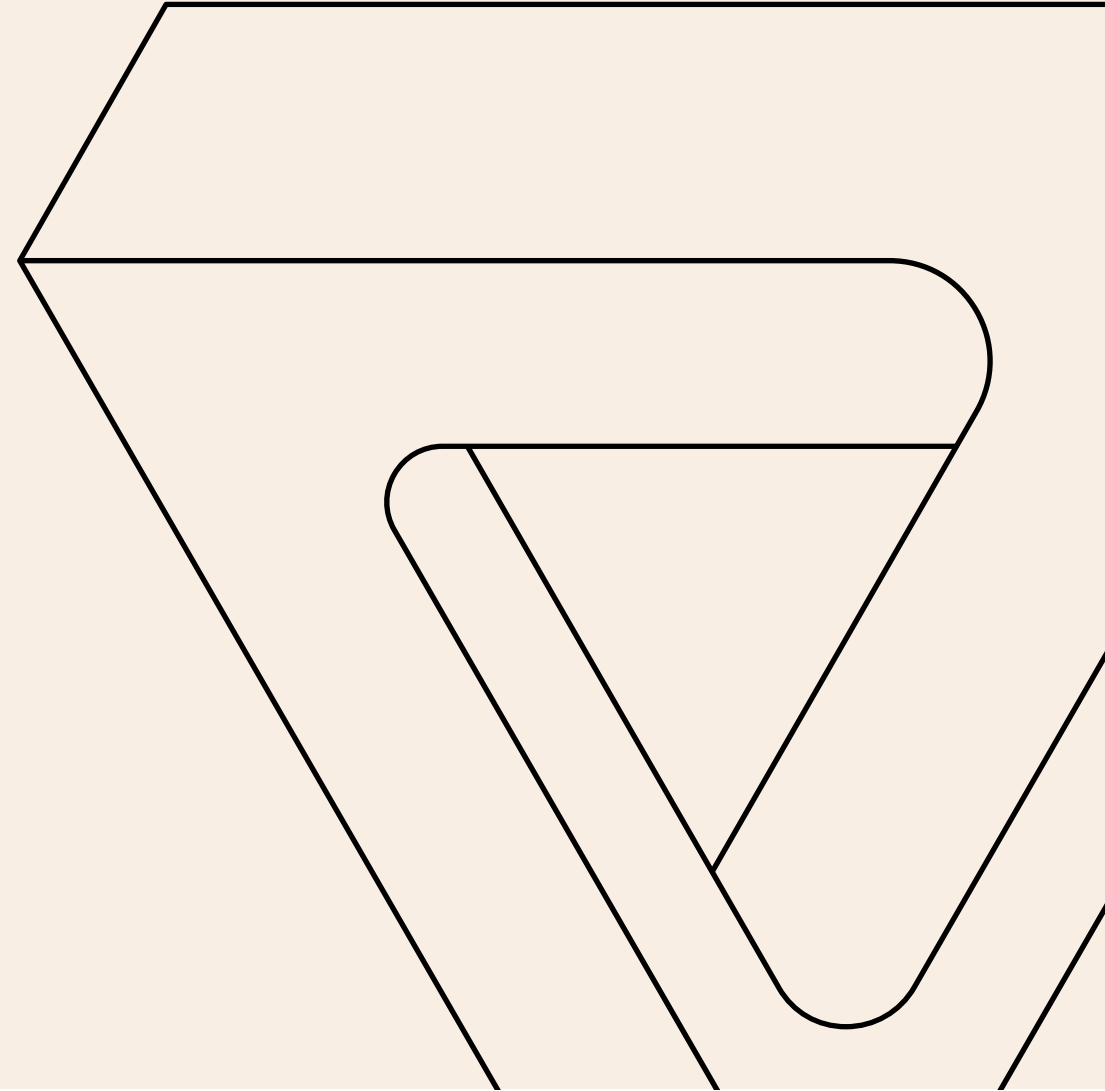
Thank You!

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Please use the Q&A function to ask any questions

– all questions will be captured
and sent to the presenters





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