

Catrina Schläger, Martin Güttler, Jan Niklas Engels

Analysis of the Bundestag Elections 2021

A Historic Bundestag Election and an SPD comeback

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THE MAIN RESULTS AT A GLANCE

The Bundestag elections 2021 stand out in a number of respects. For the first time (with the exception of the first Bundestag election in 1949) there was no Chancellor seeking re-election. Furthermore, three parties were fielding a candidate for Chancellor. On top of that, the election took place during a pandemic, which, on one hand, had direct effects on the conduct of the campaign, and on the other, brought into focus people's crisis management capabilities. These special features, coupled with Angela Merkel bowing out after 16 years in the Chancellor's office, the global challenges of climate change and the resulting need for a social and ecological transformation of the economic system made the 2021 Bundestag election into something of a choice of direction. Who will be entrusted with the leadership of the government in these uncertain times? Who will lead Germany out of the Covid-19 pandemic and take the necessary steps to ensure prosperity and social cohesion in the country going forward?

Looking briefly at the main results¹:

- A red comeback: The SPD is back and looks set to be the strongest party in the Bundestag. Its success, gaining 25.7 per cent of second votes, is clearly driven by SPD candidate for chancellor Olaf Scholz. For the Union, however, the era of Angela Merkel has ended with historically its worst ever result of 24.1 per cent. The CDU/CSU lost 8.9 percentage points in comparison with the 2017 elections. Although the Greens, with 14.8 per cent, have achieved their best ever result, they have failed in their stated aim of winning the chancellorship, coming in third. The FDP take fourth place, slightly increasing their vote (by 0.7 percentage points) with 11.5 per cent of second votes.
- A triple win: But the SPD was the strongest party not just at federal level, but also in the regional elections in Mecklenburg-Western Pomerania and the elections to the House of Representatives in Berlin. With a sensational 39.6 per cent (+9) Manuela Schwesig will be returned as state premier and in the capital city Franziska Giffey, with 21.4 per cent (+0.2), will probably become the new Governing Mayor.
- A new coalition arithmetic: Because the party leaderships have rejected a continuation of the Grand Coalition the new government will be a tripartite coalition. As election winner the SPD has a clear mandate to form the next government. The first 'traffic light' coalition in the Federal Republic would be a coalition of election winners, because all three parties have made gains. Armin Laschet, however, despite his obvious defeat, has so far continued to claim that he is entitled to form a government and is trying to cobble together a 'Jamaica' coalition. Dissenting voices are increasing even within the Union camp, however. In a direct comparison of the Union and the SPD the surveys yield clear results: 50 per cent of those asked preferred an SPD-led government, with only 29 per cent wanting the Union in charge.
- Choice of candidate paid off: Olaf Scholz has scored by far the highest approval ratings in all surveys. If there was a direct ballot for the chancellor Olaf Scholz would win out with 45 per cent, followed by Armin Laschet on 20 per cent, and Annalena Baerbock with 14 per cent.
- But the party manifesto was also important: The SPD's election victory is thus the outcome of high personal approval ratings for candidate Olaf Scholz and much higher competence ratings on most of the issues people considered most important in this election. These observations, emerging from pre-election surveys, have largely been confirmed by post-election polling. Some 44 per cent of SPD voters asked indicated that they had voted for the party because of its manifesto. Some 36 per cent said they had opted for the SPD mainly because of the candidate.
- Won over by the whole package: So the SPD's electoral success was by no means solely down to the mistakes of the Union and the Greens. The SPD, on a steep learning curve, was able to put the painful experiences of the 2017 elections to good use and even reverse the trend. Starting with their early nomination of the candidate, followed by the inclusive process of drafting the manifesto,

¹ Figures and data are based on the preliminary results of the Federal Election Commissioner, primary election surveys, exit poll and election analyses by Infratest Dimap, as well as surveys by Civey.

and the party leadership's success in uniting both wings of the party the SPD managed to present itself as strong and decisive.

- A new start – but based on experience: As the Merkel era comes to a close many asked themselves for the first time: who could be chancellor apart from Angela Merkel? Just under two-thirds want a chancellor who represents a new day. At the same time, two-thirds want it to have experience of government. From the voters' standpoint, Olaf Scholz fits this profile perfectly. As Vice Chancellor he represents continuity, while in terms of the issues raised in the election campaign – minimum wages, pensions, housing and climate protection – he also stands for a new start for many people.
- SPD – equally strong in both east and west: Only the SPD (western Germany: 26.1 per cent / eastern Germany: 24.2 per cent) and the FDP (western Germany: 11.9 per cent / eastern Germany: 9.6 per cent) are more or less equally strong in both parts of the country, while the other parties have their strongholds mainly in the east, the west or the south. A glance at the direct mandates it won shows that the SPD can win in both the east and the west. For example, all direct mandates in Mecklenburg-Western Pomerania and Brandenburg went to the SPD, along with those in, for example, Bremen or Saarland. Baden-Württemberg, Saxony and Bavaria remain difficult terrain for the SPD, but they also managed to win direct mandates and in the case of second votes they were close to the national trend. In Saxony the SPD even increased its vote by 8.7 percentage points. They improved on that only in Mecklenburg-Western Pomerania (+14.0), Brandenburg (+11.9), Saxony-Anhalt (+10.2), Thuringia (+10.2) and Saarland (+10.1).
- Strong momentum in the election campaign: Looking back, the election campaign can be divided into three phases, in which a different party was the favourite: the period of hope for the Greens in early summer, the CDU/CSU dawn in summer and the red comeback in late summer. The SPD emerges the clear victor in this election campaign. In terms of the familiar 'Sunday' question – 'who would you vote for if the election was held this Sunday?' – the party managed to pull ahead of both the Greens and the CDU/CSU by 10 percentage points within a few weeks.

1

WHAT ARE THE KEY RESULTS?

1.1 THE SPD MADE CLEAR GAINS – THE UNION SUFFERED ITS WORST EVER DEFEAT

The electoral map turned red. While in 2017 it was still black with a few spots of colour, the SPD victory is now clearly evident. In comparison with the previous election, the party has won both more first and more second votes, and with 25.7 per cent it is the strongest party. Particularly in the eastern German Länder, in the north and in the west many SPD direct candidates were able to win over the voters. And in Brandenburg and Mecklenburg-Western Pomerania they managed to net all the direct mandates (in 2017 the SPD managed only one, in Brandenburg). In Saarland and Bremen, too, all direct mandates went to the SPD. The biggest haul of first votes for the SPD was achieved by Johann Saathoff in Aurich-Emden, with 52.8 per cent.

The gains are even more evident in the case of second votes. In this respect the SPD was the strongest party in many constituencies in which the direct mandate went to another party. In contrast to 2017, in which the north (east and west) went black (CDU/CSU) with few exceptions, the map is now almost solid red. In the east, the SPD is the strongest party.

With 24.1 per cent, the CDU scored its worst ever result. Although it managed virtually all direct mandates in Baden-Württemberg and the CSU all but one in Bavaria (Munich South went to the Greens), second votes, in stark contrast to the previous election, went the other way. With 31.7 per cent the CSU suffered the second worst result in its history (29.2 per cent in the first Bundestag election in 1949). Overall the Union parties lost 8.9 per cent of second votes.

The Greens won 14.8 per cent, their best ever showing. It was also able to gain some direct mandates. Its candidates did particularly well in the major cities. The same holds for its haul of second votes. Here, too, their strongholds are in the urban centres.

Figure 1
Second votes, Bundestag elections 2021 (in %)

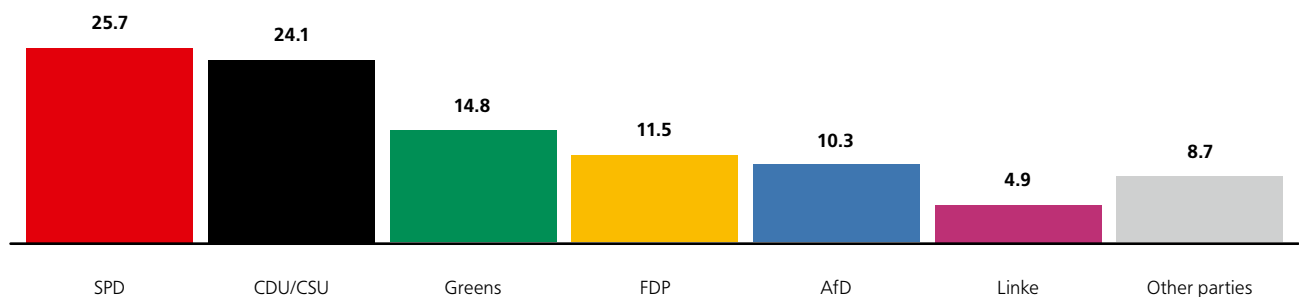
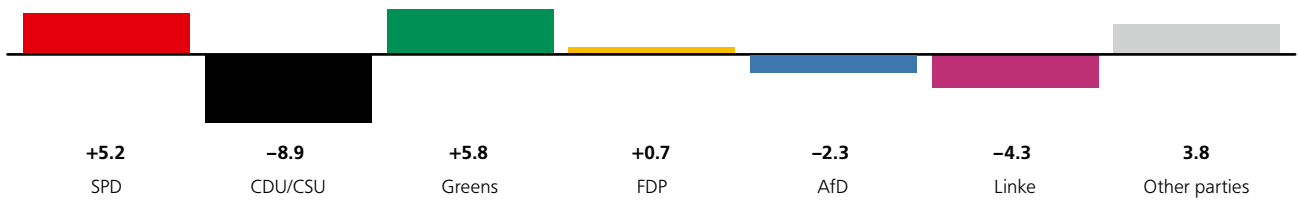
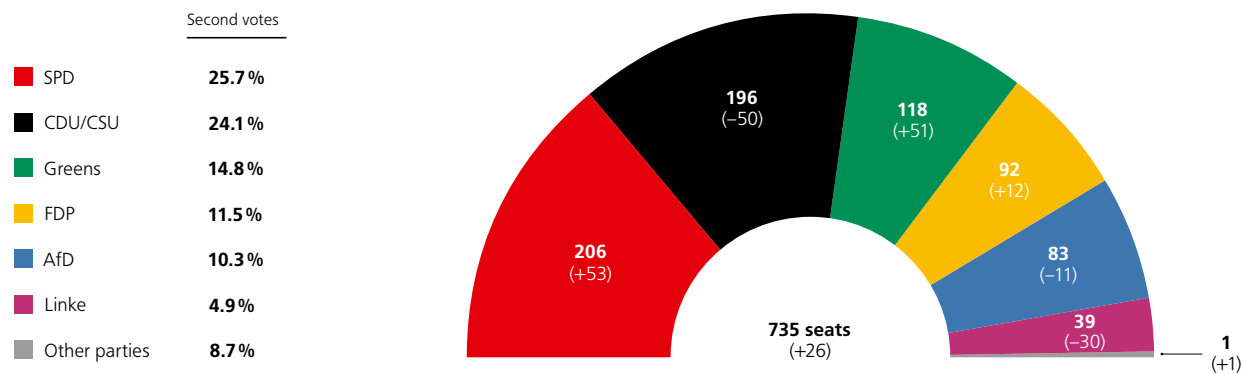


Figure 2
Gains and losses in comparison with the 2017 elections (in %)



Source: infratest dimap.

Figure 3
Distribution of seats in the 20th Bundestag



Source: infratest dimap.

The FDP was able to make gains, winning 11.5 of second votes. They didn't manage any direct mandates, however.

The AfD was unable to repeat its 2017 tally, falling back to 10.3 per cent. It was able to gain some direct mandates, however, in Thuringia and Saxony-Anhalt. It managed to establish itself as the main party in Saxony. Because of the increasing fragmentation of the party system victory is possible in constituencies with first-vote tallies somewhere over 20 per cent of the vote. As it enters the Bundestag for the second time the AfD can be said to have established itself in the German party system.

Die Linke, with 4.9 per cent, has fallen short of the 5 per cent threshold, but did manage to win three direct mandates (two in Berlin and one in Leipzig), thereby gaining a place in the Bundestag under the rules. This is Die Linke's poorest result in 15 years.

The other parties totalled 8.7 per cent of the vote, 3.8 per cent more than in the 2017 elections.

As a result of the overhang and so-called 'compensatory' mandates the Bundestag will be enlarged to 735 seats (previously 709 – the number of regular seats is 598). The CDU/CSU (Union) parliamentary group has suffered the biggest losses. They have lost 50 seats, and now have only 196 MPs. The SPD group has managed the most gains (+53), giving them 206 MPs. The Green Party has done almost as well, with

+51, giving them 118 seats. The FDP has gained 12 and now has 92 MPs. Die Linke, by contrast, has lost 30 mandates and now has 39 seats. The AfD has had to swallow the loss of 11 mandates and has 83 MPs. In addition, the South Schlesian Voter's Union (Südschleswigsche Wählerverband) has one MP in the Bundestag.

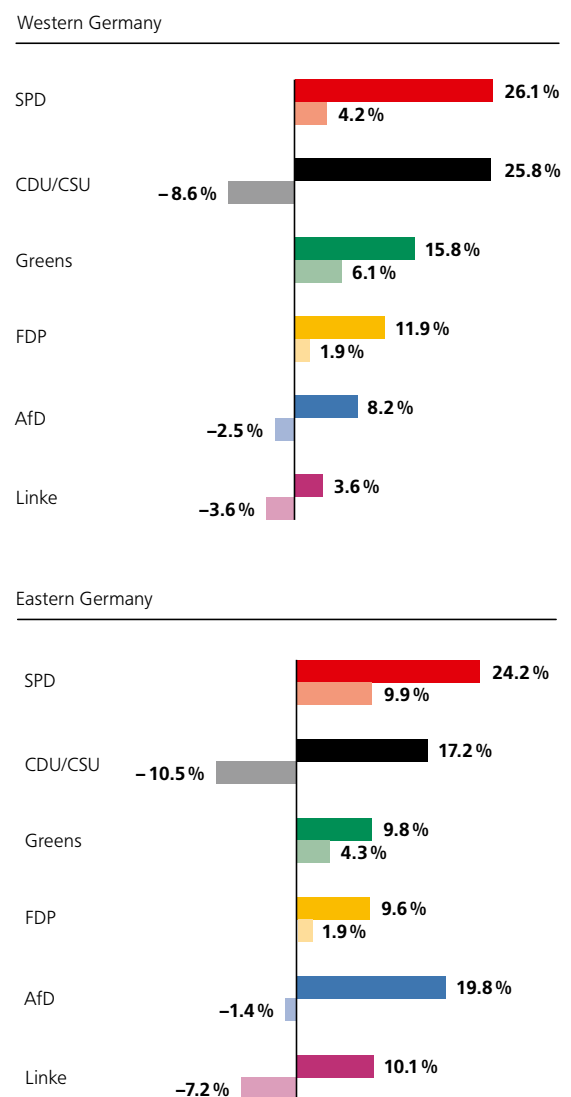
2

WHO VOTED FOR WHOM?

2.1 ONLY A FEW PARTIES ARE EQUALLY SUCCESSFUL IN BOTH EASTERN AND WESTERN GERMANY

Looking at different population groups, the 2021 election results exhibit major differences between the parties. For example, most parties achieve very different results in eastern and in western Germany. In eastern Germany, the AfD manages 19.8 per cent and is particularly strong in Saxony (24.6 per cent) and Thuringia (24.0 per cent). In western Germany, on the other hand, it can manage only 8.2 per cent of second votes. Although Die Linke suffered sharp losses in its eastern strongholds, it still managed 10.1 per cent in eastern Germany. In the west, by contrast, it totalled only 3.6 per cent of second votes. The opposite is the case for the CDU/CSU and the Greens, which are much weaker in eastern Germany than in the west. While the CDU/CSU won 25.8 per cent in western Germany, it only managed 17.2 per cent of second votes in the eastern Bundesländer. The Greens rose in western Germany by 6.1 percentage points to 15.8 per cent. In the east they rose by only 4.3 percentage points, racking up 9.8 per cent of second votes there. In the east-west comparison, only the FDP are almost equally strong (western Germany: 11.9 per cent/eastern Germany: 9.6 per cent) as the SPD (western Germany: 26.1 per cent/eastern Germany: 24.2 per cent). The SPD's gains in the east were particularly high, at 9.2 percentage points. A glance at the direct mandate they gained shows that the SPD can win in both the east and the west. As already mentioned, all direct mandates in Mecklenburg-Western Pomerania and Brandenburg went to the SPD, as they did in Bremen and Saarland, for example. Baden-Württemberg, Saxony and Bavaria remain difficult terrain for the SPD, however, although they were able to win some direct mandates and as regards second votes they were almost in line with the national trend. In Saxony the SPD managed to gain 8.7 percentage points. The only places where their gains were higher were Mecklenburg-Western Pomerania (+14.0), Brandenburg (+11.9), Saxony-Anhalt (+10.2), Thuringia (+10.2) and Saarland (+10.1).

Figure 4
East-west comparison, second votes (in % and changes)



Source: infratest dimap. Exit Poll.

2.2 DIFFERENT VOTING PREFERENCES AMONG 'OLD' AND 'YOUNG'

While there were only marginal differences in voting behaviour with regard to gender, voting differed strongly by age group. The youngest voters (18–24 years of age) were most inclined to vote Green, at 23 per cent. This is closely followed by the FDP, at 21 per cent, which scored a 9 percentage point increase in this age group. Then comes the SPD with 15 per cent. Support for the CDU/CSU plummeted in this age group (–14 percentage points, falling to 10 per cent). Then follow Die Linke with 8 per cent and the AfD with 7 per cent.

Among voters 60 years of age or above the picture is completely different. The SPD rose by 10 percentage points to 34 per cent of second votes, putting them in first place. The CDU comes next, on 33 per cent, but as with other age groups they lost support here, too. The other parties follow a considerable distance behind. Although the Greens gained somewhat (3 percentage points), they still managed only 8 per cent. The FDP and the AfD also tallied 8 per cent, both losing 2 percentage points on 2017. Die Linke lost half their votes in this age group, which now stand at 4 per cent. They have lost out in all age groups, although they did somewhat better among younger voters.

The AfD is the only party that achieved its best result in the age segment 35–44 years of age. They lost votes in all segments, and find most support among voters who are dissatisfied with their economic circumstances and are disappointed with the other parties.

2.3 THERE ARE ALSO SUBSTANTIAL DIFFERENCES IN RELATION TO OCCUPATIONAL STATUS AND EDUCATION

Voting behaviour also varies considerably in relation to formal education and occupational status. The SPD's strongest support, accounting for 35 per cent, was among pensioners (+7 percentage points). The CDU/CSU comes next, at 34 per cent, losing 7 percentage points. The Greens come third, by some distance, with 10 per cent.

The SPD also enjoys above-average support among blue-collar workers, at 26 per cent (+3). It is clearly the strongest party, in front of the AfD on 21 per cent (+/–0) and the CDU/CSU on 20 per cent (–5). Die Linke managed only 5 per cent (–5) and lies behind the FDP on 9 per cent (+1) and the Greens on 8 per cent (+3).

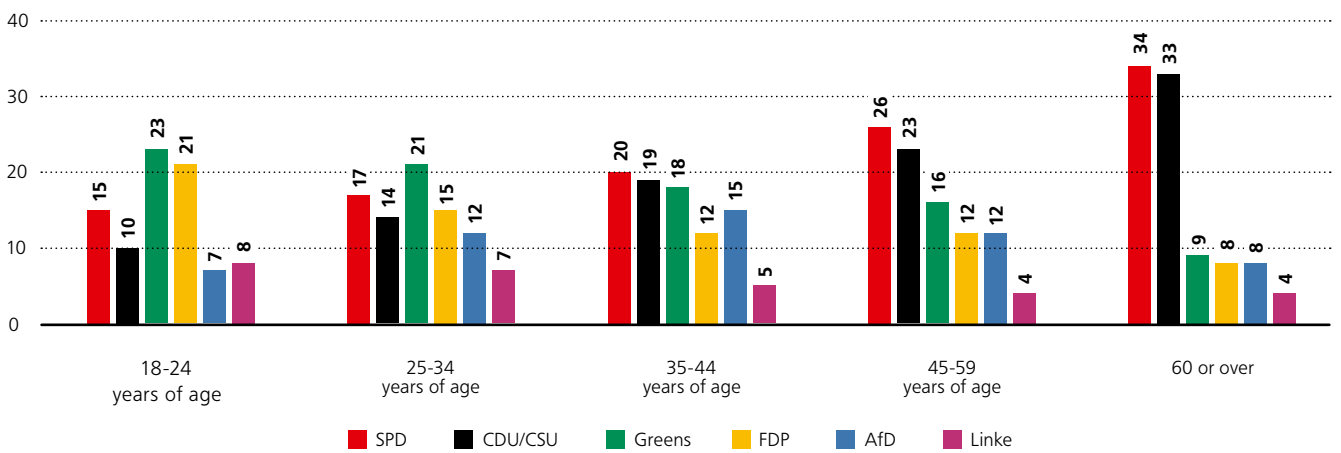
Among the self-employed 26 per cent backed the CDU/CSU, although that represents a decline of 10 percentage points. In second place among the self-employed come the FDP with 19 per cent of their second votes. The SPD and the Greens both gained 16 per cent, gaining support in this occupational group.

Civil servants mainly favour the CDU/CSU, at 29 per cent, although that represents a fall of 7 percentage points. On the other hand, 24 per cent of this group backed the Greens (+8 percentage points). The SPD managed 19 per cent, a 1 per cent increase.

Closely linked to occupation and activity, generally speaking, is formal education. The SPD is the strongest party

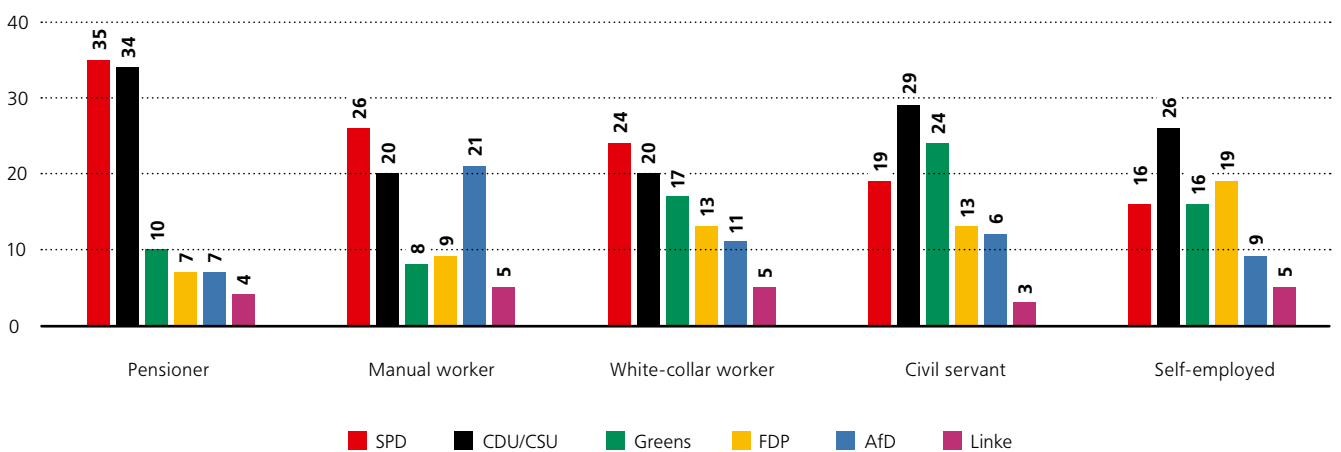
among voter groups with lower and medium education: 33 per cent (+7) and 27 per cent (+6). Next comes the CDU/CSU, on 31 per cent (–7) among voters with a lower level of education and 24 per cent (–9) among those with a middle level of education. First place among voters with a higher education is taken by the Greens, who register an above-average 23 per cent (+9). They are closely followed by the SPD, however, on 22 per cent (+4) and the CDU/CSU, on 21 per cent (–9).

Figure 5
Age groups (in %)



Source: infratest dimap, Exit Poll.

Figure 6
Activity/occupation (in %)



Source: infratest dimap, Exit Poll.

3

WHAT WERE PEOPLE'S REASONS FOR VOTING?

3.1 THE SPD WON PEOPLE OVER WITH BOTH THEIR PROGRAMME AND THEIR CANDIDATE

Concerning possible reasons for voting it is clear that the SPD has emerged from the election campaign as the strongest party on the basis of both its candidate for chancellor and their policy programme. If the Bundestag election was a direct election of the chancellor, Olaf Scholz would have been the clear victor.

With 45 per cent Olaf Scholz is well ahead of Armin Laschet and Annalena Baerbock, whom only 20 and 14 per cent of voters respectively would directly elect. In July the national trend for the candidates of both the SPD and the CDU/CSU was still level pegging (29 per cent Scholz as against 28 per cent Laschet), while the Green candidate had already fallen back into third place, on 18 per cent. By August, however, the Deutschlandtrend survey was registering a significant shift. The survey was conducted after the disastrous flooding in western Germany, so there is a clear connection to the candidates' values. Laschet's approval fell to 20 per cent, while that of Scholz rose to 35 per cent, while Baerbock fell back slightly to 16 per cent. At that time the majority of those asked (35 per cent) still favoured the CDU/CSU to lead the next government (SPD 25 per cent and the Greens 16 per cent). Over the ensuing weeks, however, not only did Scholz's approval rating rise in response to the direct ballot question, but his party went up a few notches on the question of which party should lead the next government, with the mood turning in their favour. They now stood at 38 per cent, with only 28 per cent favouring a government under CDU/CSU leadership (Greens 14 per cent). This shows that not only the SPD's candidate, but also the party as a whole was able to win over the voters in the final weeks before the election.

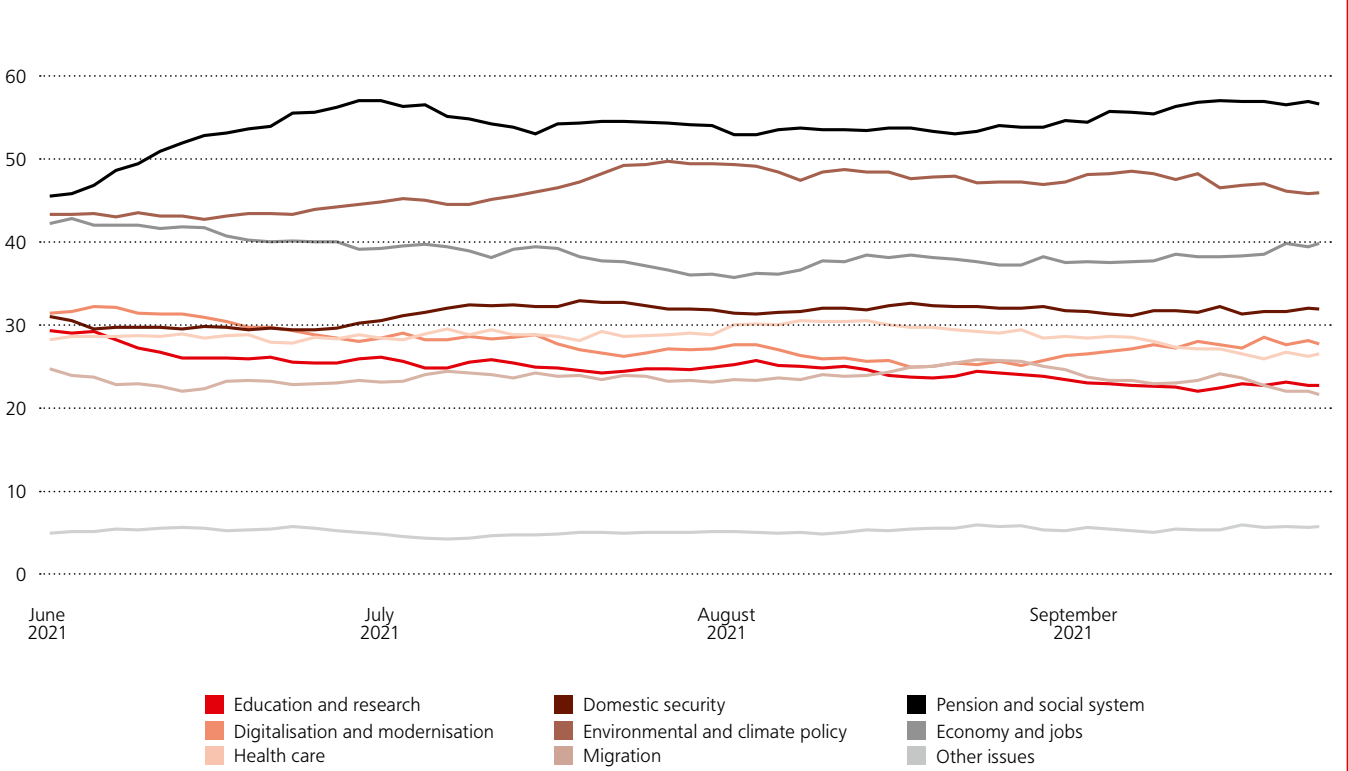
This also becomes evident when considering the issues that people saw as most important in the 2021 Bundestag election campaign, as well as the competence attributed to the various parties. For example, a survey conducted by the Civey Institute in the run up to the election asked people what three issues were likely to influence their voting the most. The main issues, cited by 56.3 per cent of respondents,

was pensions and social security, followed by environmental and climate policy, on 46.2 per cent, and the economy and jobs, on 39.1 per cent.

When it comes to party competence, it is evident that the SPD is well ahead on these issues, with the exception of environmental and climate policy and, to a lesser extent the economy as distinct from jobs. On the issue of old age provision (SPD 36 per cent, CDU/CSU 20 per cent, Greens 4 per cent), health care (SPD 33 per cent, CDU/CSU 24 per cent, Greens 9 per cent), family policy and child care (SPD 32 per cent, CDU/CSU 18 per cent, Greens 19 per cent), as well as social justice (SPD 40 per cent, CDU/CSU 15 per cent, Greens 7 per cent) substantially more people have confidence that the SPD will be able to tackle the upcoming tasks. On the topic of environmental and climate policy, by contrast, just under half of those asked (48 per cent) stated that the Greens are best able to cope with the challenges ahead, while the SPD (13 per cent) and the CDU/CSU (12 per cent) score much lower on this issue. By contrast, 44 per cent of respondents trust the SPD to ensure decent wages, with as few as 16 per cent feeling the same way about the CDU/CSU and a mere 5 per cent the Greens. On the three main issues the CDU/CSU were ahead only on the economy, with 32 per cent, while the SPD wasn't too far behind, on 25 per cent, while the Greens received a lowly 6 per cent. The FDP receives its best rating on this issue, at 16 per cent, enabling it to score points even beyond its own constituency.

The SPD's election victory thus derives from the high personal approval ratings of candidate Olaf Scholz and much higher competence ratings on most of the issues that people found important in this election. These observations, emerging from pre-election polling, have been confirmed by post-election surveys, insofar as 44 per cent of SPD voters stated that they had voted on the basis of its election programme, while 36 per cent did so because of the party's candidate.

Figure 7
Which three political issues will most influence your voting at the 2021 Bundestag elections? (in %)



Source: civey, data as of 24 September 2021.

4

WHAT HAS CHANGED IN COMPARISON WITH PREVIOUS YEARS?

4.1 TURNOUT AND POSTAL VOTING

Just over 46.8 million of the 61.2 million people who are entitled to vote chose to do so. Voter turnout thus rose slightly by 0.4 percentage points to 76.6 per cent. Nevertheless, fewer votes were cast than in 2017 because the total number of people entitled to vote has fallen a little. The extent to which income correlates with turnout cannot be derived from the available data. Whether the trend ‘the lower their income the less likely people are to vote’ has continued remains to be seen.

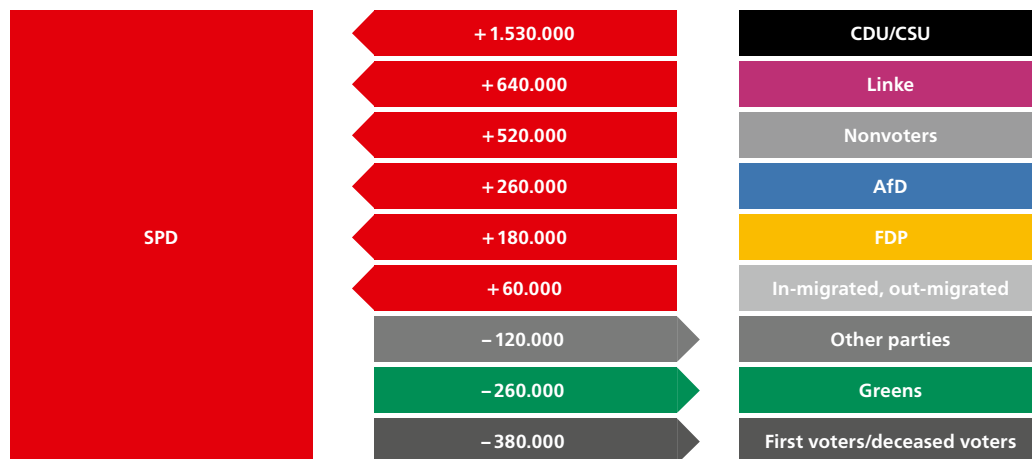
There are still no data on the proportion of postal voters. Around 40 per cent of those entitled to vote applied for this option, so that – particularly because of the Covid-19 pandemic – it is highly likely that postal voting has continued to increase significantly.

4.2 VOTER MIGRATION

Voter flows are methodologically very hard to capture. Our analysis is based on Infratest Dimap’s exit poll in 560 representative polling stations and electoral districts.

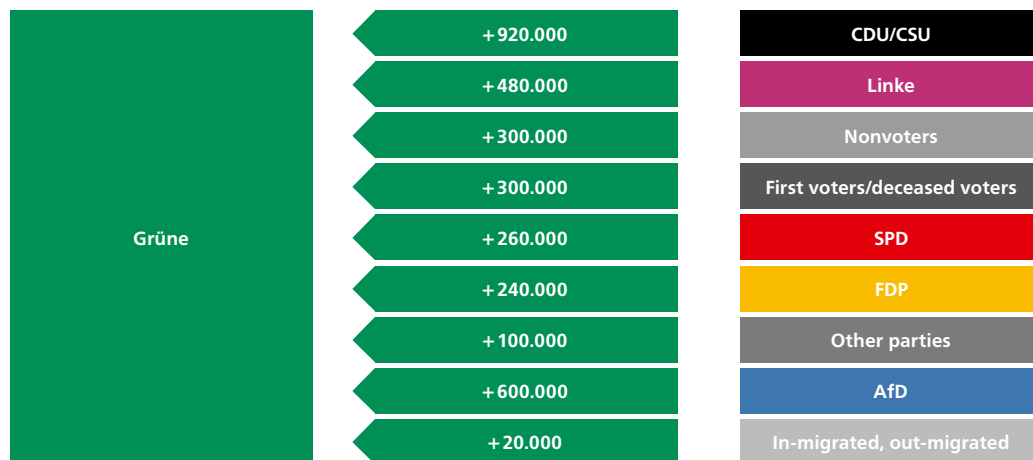
In comparison with 2017 the SPD gains 2.2 million votes. The bulk of them – 1.53 million – comes from the CDU/CSU. But it is not only former Merkel voters who have opted for Olaf Scholz and the SPD. Some 640,000 votes come from former Die Linke supporters. The third largest group are former non-voters, with 520,000 votes. Former AfD voters account for just over 10 per cent of the gains, at 260,000. Another 180,000 votes come from the FDP camp and 60,000 from population movements. Some 380,000 SPD voters have passed away since the previous election, while 260,000 votes went to the Greens and 120,000 to other parties.

Figure 8
Voter migration – SPD



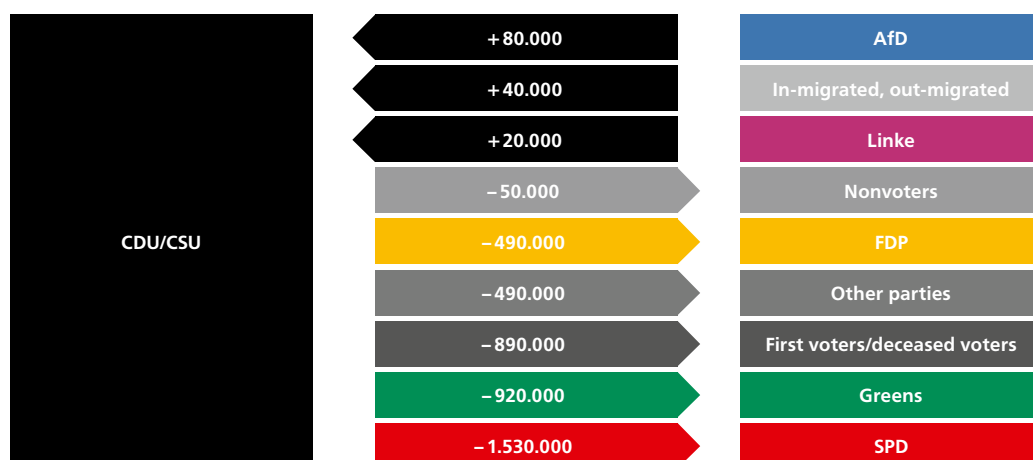
Source: infratest dimap.

Figure 9
Voter migration – Greens



Source: infratest dimap.

Figure 10
Voter migration – CDU/CSU



Source: infratest dimap.

In the ranking of votes gained, the Greens similarly take first place: 920,000 votes from the CDU/CSU, 480,000 from Die Linke and 300,000 from non-voters. The number of first-time voters opting for the Greens has been estimated at 300,000. Overall, the Greens gained over 2.5 million additional votes.

The voter migration picture for the CDU/CSU, in the context of the party's worst ever result, looks quite different. There were only slight gains, from the AfD (80,000), population movements (40,000) and Die Linke (20,000). Overall the CDU/CSU received just over 11 million votes, a loss of almost 4.3 million. As already mentioned, the biggest voter migrations were to the SPD (1.53 million) and the Greens (920,000). But deceased voters and a low take-up among first-time voters also took their toll, at 890,000 votes.

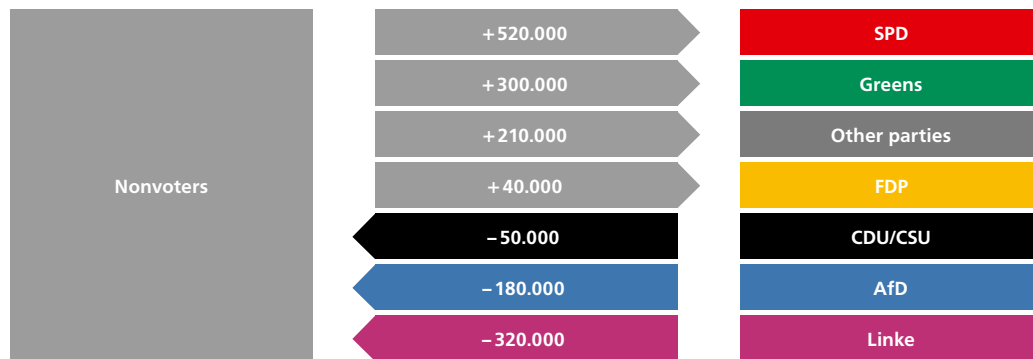
Further losses benefitted the FDP (490,000) and other parties (490,000).

4.3 NONVOTERS AND OTHER PARTIES

Good news is that the number of non-voters fell. By far the largest proportion of former non-voters opted for the SPD, an increase of 520,000. The Greens gained 300,000 and the FDP 40,000 votes. By contrast, former voters of the CDU/CSU (-50,000), the AfD (-180,000) and Die Linke (-320,000) turned into non-voters.

Votes cast for the other parties are also worth a look. Some 210,000 former non-voters cast their votes for one of

Figure 11
Voter migration – Nonvoters



Source: infratest dimap.

the other parties, previously not represented in the Bundestag. Some 8.7 per cent of second votes went to this party group. The so-called 'Freie Wähler' (Free Voters) did best (+1.4 percentage points), winning 2.4 per cent. Over 1 per cent of second votes went to the Animal Protection Party (1.5 per cent), 'Die Basis' (the Basic Democratic Party of Germany) (1.4 per

cent) and 'Die Partei' (The Party) (1.0 per cent). Votes for these parties tend to be at least partly an expression of dissatisfaction with what is on offer from the mainstream parties, but it is interesting to note that despite the challenges of a pandemic and a general disdain for politics vote gains for these parties were very low.

5

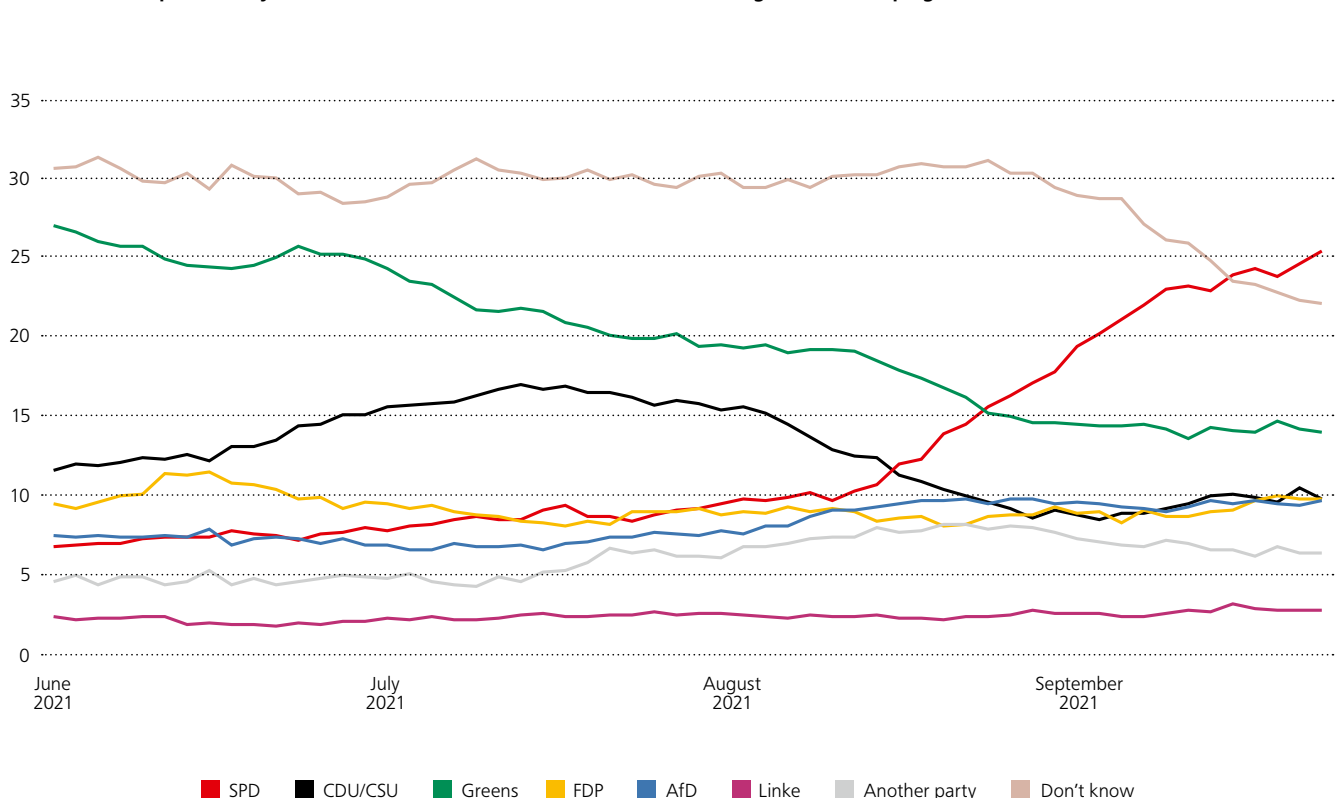
HOW DID THE ELECTION CAMPAIGN GO?

5.1 A VERY DYNAMIC ELECTION CAMPAIGN

Looking back, the election campaign can be divided into three phases, in which a different party was the frontrunner: the hope of the Greens, the dawn of the CDU/CSU and the red comeback. In the first phase, in early summer, the Greens were ahead and even had the chancellor's office in their sights. It appeared to be a duel between the Greens and the CDU/CSU, at which for many people the SPD were only onlookers. During this period they flatlined – like the whole year of

Covid-19 – at 15 per cent on the so-called Sunday Question (who would you vote for if there was an election on Sunday?) By contrast, the Greens were able to launch their election campaign at the level of their 2019 European elections vote (20.5 per cent) and after the nomination of Annalena Baerbock as candidate for chancellor in April they even overtook the CDU/CSU. They were unable to maintain their momentum, however, due to a series of errors, including allegations of 'CV padding', failure to declare bonus payments and plagiarism. Instead, the CDU/CSU was able to gain ground. But

Figure 12
Which of these parties, in your view, has so far conducted the most convincing election campaign? (in %)



Source: civey, data as of 24 September 2021.

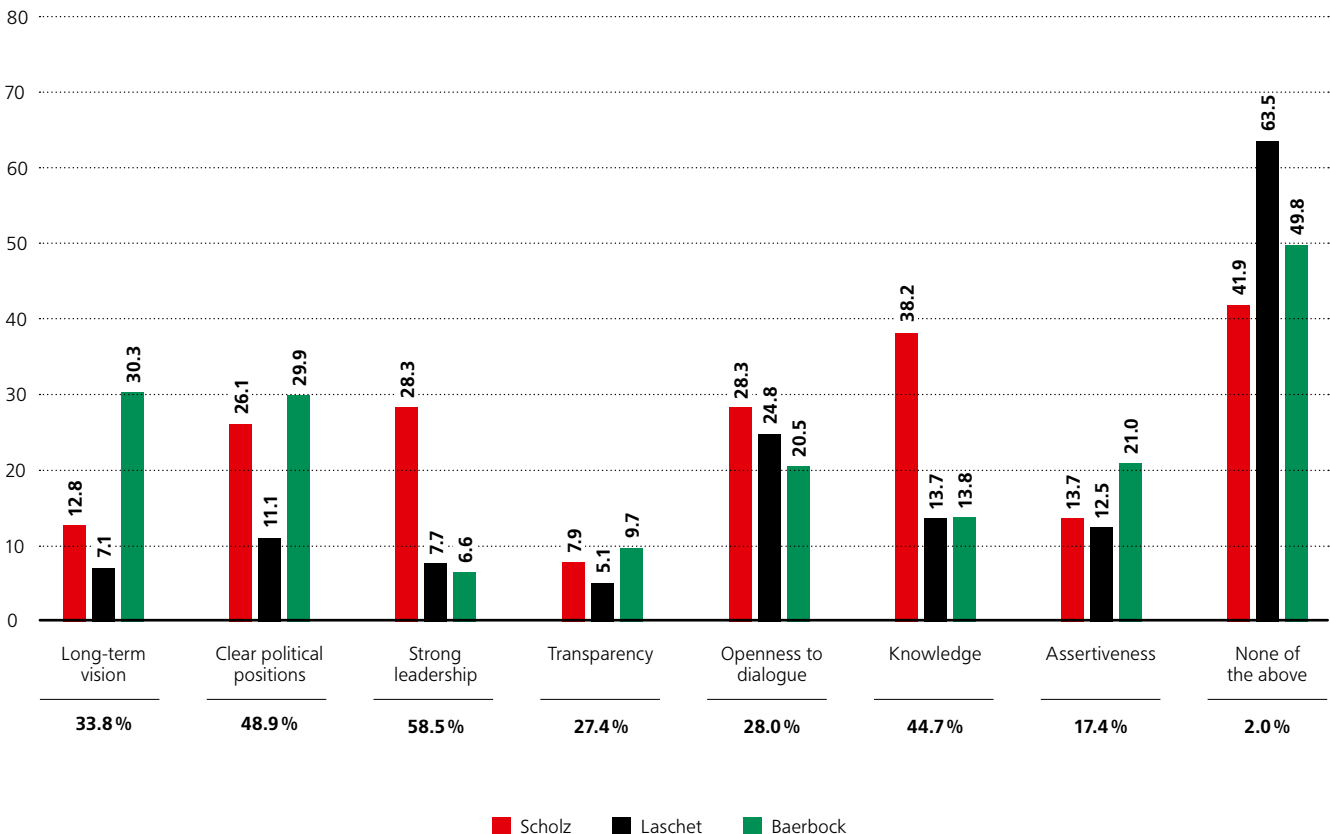
even when they had their noses in front during this second phase of the election campaign they were unable to make a breakthrough. They became too caught up in the tricky process of selecting a new candidate for chancellor and internal party wrangling. Furthermore, over the summer the voters gradually came to realise that Angela Merkel really wasn't going to stand again. They could kiss goodbye to incumbent advantage. The catastrophic floods and the inept performance of the CDU candidate was the turning point, ushering in the third phase of the election campaign with a red comeback. The SPD rose continuously in the polls and managed to overtake both the Greens and the CDU/CSU with a 10 percentage point plus lead. The wind had changed and the final phase of the election campaign was a duel between the SPD and the CDU/CSU. No previous national election had been so volatile.

Overall, the voters evaluated the parties' election campaigns in line with the evolution of responses to the Sunday question. After flying high for a while, the Greens were brought back to earth by the CDU/CSU, although the SPD won out in the end. A successful election campaign comprises a number of different elements. Above all it needs a convincing candidate, a united party that is able to mobilise its members – but also beyond them – and a strong party programme, enabling it to stamp its own political agenda.

5.2 CHOOSING THE RIGHT CANDIDATE PAID OFF

Choice of candidate was again a prominent factor in this election. In previous Bundestag elections Mrs Merkel had been able to capitalise on her incumbency. With her departure from the stage for many people the question of who could be chancellor apart from Angela Merkel arose for the first time. It must be stressed first of all that just under two-thirds wanted a chancellor able to usher in a new start. At the same time, two-thirds wanted their new chancellor to have had governmental experience. As the Merkel era draws to a close, Germans want a restart, but based on experience. The main qualities Germans seek in a chancellor include strong leadership, clear policies, knowledge and a long-term vision. None of the three candidates could garner majority support on these points. But Olaf Scholz covers the broadest spectrum and scores points on knowledge (38 per cent), strong leadership (28 per cent), willingness to dialogue (28 per cent) and clear policies (26 per cent). Annalena Baerbock's strengths include a long-term vision (30 per cent), clear policies (30 per cent), assertiveness (21 per cent) and willingness to dialogue (21 per cent). In the case of Armin Laschet his willingness to dialogue stands out (25 per cent). Olaf Scholz was thus the most convincing candidate in the final phase of the election campaign and established himself as the favourite.

Figure 13
In your opinion, what applies to the political style of the candidate? (in %)



Source: civey, data as of 24 September 2021.

5.3 PARTY UNITY AS A SUCCESS FACTOR

When it comes to party unity it was primarily the Greens and the SPD that managed to maintain it, while the CDU/CSU appeared divided. The contest between Markus Söder and Armin Laschet to become candidate for chancellor, notwithstanding subsequent – barely convincing – declarations of solidarity, weakened the CDU/CSU considerably. Not only that, but they showed how divided the party is as it emerges from the Merkel era. A conflict over the Union's future direction seems inevitable in the wake of the Bundestag election. The Greens had not been in government since 2005, having briefly scented power during the Jamaica coalition negotiations in 2017. As a result, with their new leadership team of Annalena Baerbock and Robert Habeck – from the party's realist wing – the Greens returned to the political centre and signalled they were ready to make a real bid for the chancellorship. After the painful election experience of 2017 the SPD was able to traverse a steep learning curve and even to reverse the political trend. Starting with their early nomination of chancellor, followed by the inclusive process of drafting the manifesto, and the party leadership's success in uniting both wings of the party the SPD managed to present itself as strong and decisive. In contrast to previous election campaigns candidate and party programme were in sync, enabling the party to conduct an authentic campaign and offer a coherent overall package.

5.4 CLEAR POLICY POSITIONS ONLY IN THE FINAL STRETCH

None of the parties were able to get their message across to the public, other than in short bursts, instead, this election was largely driven by external factors. First and foremost, Covid-19, then the catastrophic floods and finally the tragic events in Afghanistan. In the three TV debates and the many media interviews and participatory formats various policy positions hove into view, but it was only in the closing phase of the election campaign that polarisation became clear. The SPD and the Greens positioned themselves over against the CDU/CSU and the FDP, and sent up a clear signal on social, economic and climate policy that they were aiming for a fresh start, which appealed to many voters. The conservatives and liberals (FDP) sought to exploit the refusal to rule out a red-green-red coalition with Die Linke for a rerun of the CDU's so-called 'red socks' campaign of 1994, warning of a lurch to the left. This enabled the Union to mobilise its base. The realistic prospect of a Social Democratic chancellor, however, persuaded many Die Linke voters to switch to the SPD, to the considerable weakening of their former party.

6

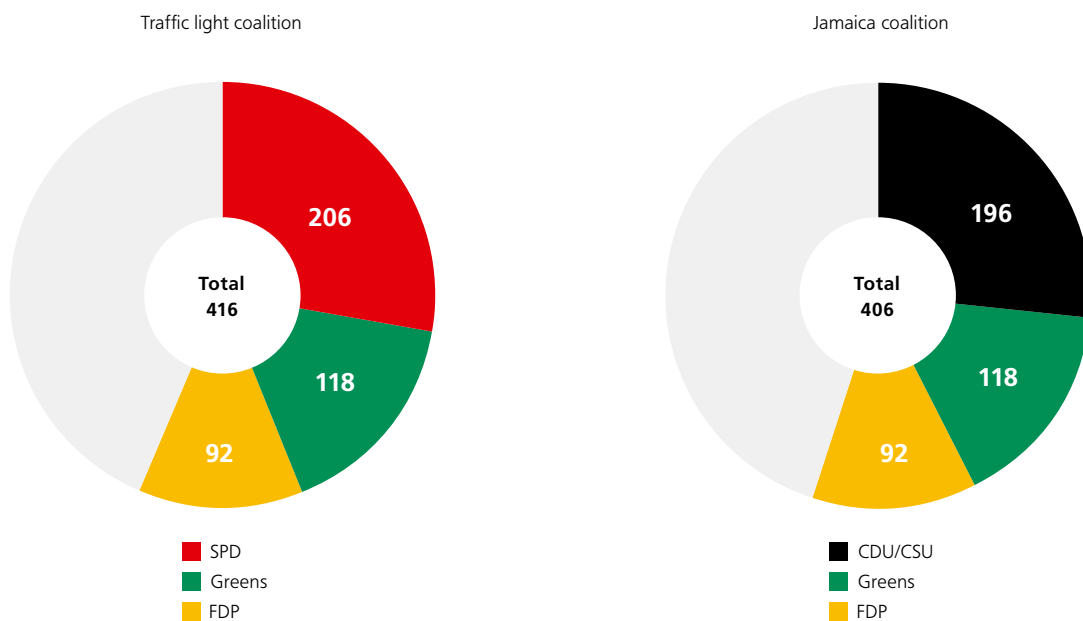
WHO WILL FORM THE NEW GOVERNMENT?

6.1 A TRIPARTITE COALITION WILL FORM THE NEXT GOVERNMENT

The Bundestag election of 2021 represents a historic caesura in terms of German coalition arithmetic. Although there is a mathematical majority that would enable the continuation of the Grand Coalition this has been vehemently rejected by the two party leaderships. Thus the first tripartite coalition will have to be formed. As election winner the SPD has received a clear mandate to form the next government. The first 'traffic light' coalition at federal level would be a coal-

tion of election winners, because all three parties have made gains. Armin Laschet, however, despite his obvious defeat, has so far continued to claim that he is entitled to form a government and is trying to cobble together a 'Jamaica' coalition. There are dissenting voices even within the Union camp, however. In the Infratest Dimap voter survey one-third favoured a Grand Coalition, just under a quarter wanted a traffic light coalition and a fifth a Jamaica coalition. In direct contrast to this, however, 50 per cent of voters want an SPD-led government, with only 29 per cent preferring one led by the CDU/CSU.

Figure 14
Theoretically possible coalitions



Source: Federal Election Commissioner.

6.2 EVERYONE WANTS THEIR SAY: TOUGH NEGOTIATIONS AHEAD

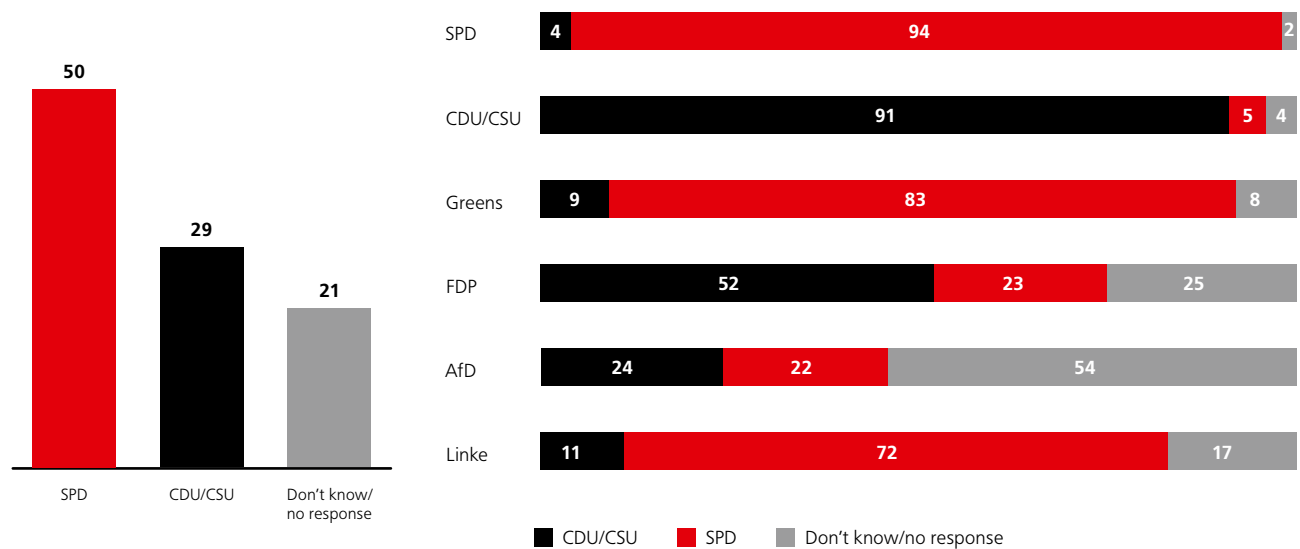
This time, forming a government will be a complex and presumably protracted task. Three factors conspire to bring this about: first, a flattening out of power asymmetries. While usually – with the exception of the Grand Coalition – there is a clear imbalance between a major and a minor coalition partner, there is much less distance between the prospective partners here. It is not only that in the wake of this election a party with '20 + x per cent' of the votes can put forward a candidate for chancellor. The relative levelling has ramifications for the ability to reach a political compromise in the form of a coalition agreement and allocation of cabinet roles. Concerning the smaller coalition partners, however, it should be pointed out that the SPD won almost as many votes as the Greens and the FDP put together.

Second, the losers could also emerge from the election as winners if they manage to form a majority. Armin Laschet's

aim appears to be, despite the Union's historic election defeat, to lead the next government. It is highly questionable, however, whether he can rely on the consistent support of the CDU/CSU for this plan. He is ultimately responsible for the party's worst result since the founding of the Federal Republic. On the other hand, a weakened coalition partner might be an attractive option for the Greens and the FDP, because they would be able to make far-reaching demands in the course of negotiations.

Third, there is no master plan; it is all open ended. There are no constitutional law guidelines for situations like this, in which there is no clear majority, on how to form a government. Who should negotiate with whom? What about? At what point? Should the smaller prospective coalition partners first sound out what they have in common before approaching the larger ones? Or should the two larger parties take the reins and lay down the ground rules? Success will go to those that can bring the best negotiating skills to the table, who are well prepared and attract the best offers.

Figure 15
Which coalitions do the voters want? (in %)



Data set: all those entitled to vote in Germany

Source: infratest dimap.

7

SUMMARY

The Bundestag elections of 2021 represent a turning point, with the potential for a historic reset. The time is over – or at least only barely imaginable – when parties with 40 per cent of the votes could govern with a junior partner. Instead, in the current situation, two parties have 20 plus x per cent, three parties have 10 plus x, and the rest have below 10 per cent. The parties' diverse plans, objectives and projects need to be combined in such a way as to give a new coalition its own identity. The voters, for their part, have clearly indicated that they want modernisation. In addition to a clear programme, a party needs to be broadly rooted in various social groupings. The SPD has a clear advantage in this respect, as this analysis has shown, because it enjoys strong approval ratings in the different population segments. Enriched by the ideas and everything else that the Greens and the FDP could bring to the table, a productive constellation could emerge that would benefit the whole country. The parties that stand for social justice, climate protection and the economy would set the course for a new social contract in Germany.

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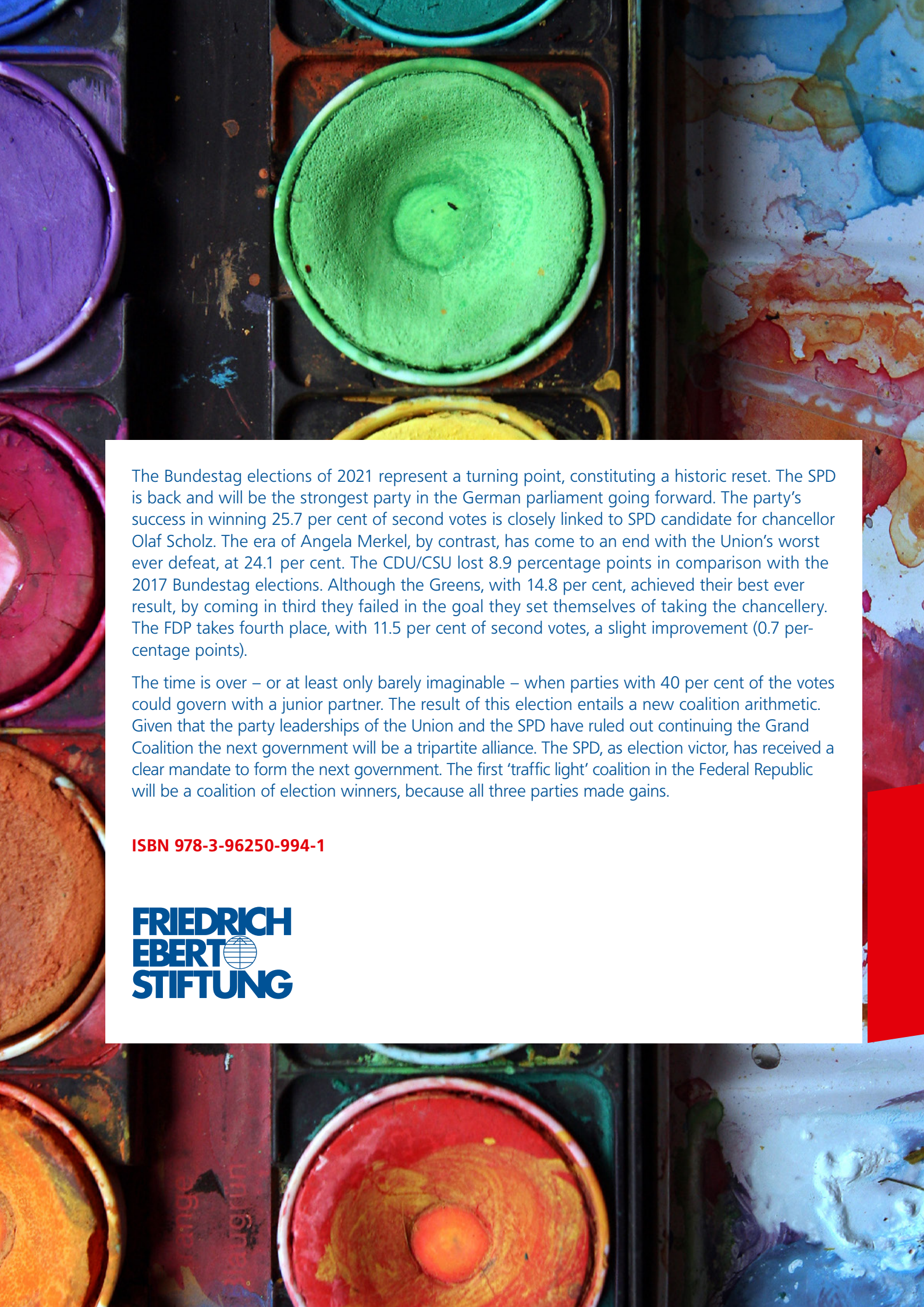
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The Bundestag elections of 2021 represent a turning point, constituting a historic reset. The SPD is back and will be the strongest party in the German parliament going forward. The party's success in winning 25.7 per cent of second votes is closely linked to SPD candidate for chancellor Olaf Scholz. The era of Angela Merkel, by contrast, has come to an end with the Union's worst ever defeat, at 24.1 per cent. The CDU/CSU lost 8.9 percentage points in comparison with the 2017 Bundestag elections. Although the Greens, with 14.8 per cent, achieved their best ever result, by coming in third they failed in the goal they set themselves of taking the chancellery. The FDP takes fourth place, with 11.5 per cent of second votes, a slight improvement (0.7 percentage points).

The time is over – or at least only barely imaginable – when parties with 40 per cent of the votes could govern with a junior partner. The result of this election entails a new coalition arithmetic. Given that the party leaderships of the Union and the SPD have ruled out continuing the Grand Coalition the next government will be a tripartite alliance. The SPD, as election victor, has received a clear mandate to form the next government. The first 'traffic light' coalition in the Federal Republic will be a coalition of election winners, because all three parties made gains.

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