

Only halfway there

Germany's election campaign is creating a security risk

Voters are not being prepared for the difficult decisions ahead



Illustration: Klawe Rzeczy

Feb 5th 2025|BERLIN

IN FEBRUARY 2022, three days after Vladimir Putin invaded Ukraine, Olaf Scholz, Germany's chancellor, declared a generational [change in foreign and security policy](#). In his *Zeitenwende*, or "turning-point", address to the Bundestag Mr Scholz announced a raft of changes to Germany's diplomatic, security and energy posture, ranging from a long-term promise to meet the nato defence-spending target of 2% of gdp to bolstering energy resilience. "The world afterwards", he said, "will no longer be the same as the world before."

Germany's election on February 23rd, which will probably mark an end to Mr Scholz's tenure, is a good moment to assess the durability of his *Zeitenwende*. Three years on, much about Germany's world is indeed no longer the same. Every mainstream party has committed to the 2% target; some, feeling the breath of Donald Trump on their necks, want more. Although Germany's flat economy and tight fiscal rules mean money is hard to come by, officials know that Germany's nato commitments will in time oblige them to spend closer to 3% of gdp.

Meanwhile, politicians who argued that forging energy ties with Russia helped not only German industry but also the cause of peace have been sidelined, as the country has pivoted to other sources of gas. Germany is Europe's biggest supplier of military and other aid to Ukraine, even if Mr Scholz has sometimes dragged his feet. And the defence minister, Boris Pistorius, has become Germany's most popular politician despite issuing stark warnings that the country must be *kriegstüchtig*, or "war-capable", by the end of the decade. None of this was imaginable before 2022.

Yet implicit in Mr Scholz's speech was a promise that not only would Germany stand behind Ukraine, but that it would begin to shed the timidity that had long characterised its foreign-policy stance in place of a more hard-headed approach that accepts trade-offs. And here, says Stefan Meister at the German Council on Foreign Relations, the glass looks half empty.

"The moment the Russians withdrew from Kyiv and the fighting was restricted to the east of Ukraine, everything went back to peacetime mode," says Carlo Masala, a professor at the Bundeswehr University in Munich. Specific decisions on spending, sanctions and energy have not yielded a broader rethinking of Germany's role in the world. "Simply saying that Ukraine should not lose and Russia should not win is not a strategy," he argues.

Some military figures similarly worry that in the absence of a crisis it will be harder for Germany to fulfil the pledges, implicit or otherwise, of the *Zeitenwende*. These include [some form of conscription](#) to boost the [armed](#)

forces' flagging numbers: an attempt last year by Mr Pistorius, already watered down, was scrapped after the collapse of Mr Scholz's government in November. And the work of reforming the Bundeswehr and the defence ministry itself, argues Nico Lange, a former official in the ministry, remains incomplete at best.

A fading sense of urgency also hinders the case for accelerating Germany's defence spending. A €100bn (\$104bn) fund established to meet the 2% goal will run out during the next parliament, leaving an annual gap worth €30bn-35bn, or around 6% of today's federal budget. Everyone accepts, some more vocally than others, that part of this will have to be funded by fresh borrowing, either via another off-books fund or a tweak to Germany's constitutional debt brake. But that will require tough negotiations between coalition partners after the election, and then a potentially tricky two-thirds majority in parliament.

Serious thinking is taking place on all these issues, and more, including the question of Germany's exposure to China and how to adapt the country's export model to the world's protectionist turn. But none is being seriously debated in the election campaign. "We badly need a new foreign policy, and no one is campaigning on it," says Mr Lange. "This is a grave mistake; I would even consider it a security risk."

The most immediate challenge may be contributing to the eu's response to the tariffs Mr Trump says are coming. Discussion on this has been almost entirely absent during the campaign, a striking omission given that Germany has the club's largest trade surplus with America. Tariffs of the magnitude Mr Trump threatens could pummel an economy that has already been in recession for two years.

Later could come an American demand that Europeans, with Germany near the top of the list, help police a settlement in Ukraine, should one be secured. Officially the line is that Germany is waiting for Mr Trump to move. Unofficially the question is causing sleepless nights in Berlin. Officials and mps across the spectrum remain convinced that Germany will continue or intensify its support for Ukraine, including training its troops and backing its eu bid. But sending German soldiers into harm's way is another matter. Doing so without a robust commitment of support from Mr Trump would invite Mr Putin to test the transatlantic alliance. "What would we do if Russia killed four of our soldiers?" asks an official. "Without an answer, we can't make an offer." If support for Ukraine is set against keeping nato intact, Germany will unhesitatingly choose the latter.

Many officials express bafflement, or indeed fury, with Emmanuel Macron, France's president, for, as they see it, recklessly floating the idea of establishing a "tripwire" force in Ukraine comprising thousands of European troops. There is also concern that Mr Trump may seek to strike a deal with Mr Putin over the heads of Europeans. But these worries are no substitute for a serious security debate during the election campaign. "Rather than wait, it would be smart if the Germans, along with the French, British, Poles and others, produced a proposal for the Americans on how to manage a ceasefire, along with a request for specific enablers like air and missile defence," says Claudia Major at the German Institute for International and Security Affairs.

That task may fall to Friedrich Merz, head of the conservative Christian Democratic bloc, who polls suggest will oust Mr Scholz, though his choice of coalition partner will also matter: most foreign-policy analysts would prefer the Greens over Mr Scholz's Social Democrats. On January 23rd Mr Merz outlined his approach in a sweeping speech that included a warning to German firms planning investments in China, "a state not governed by the rule of law", not to seek bail-outs if things go sour.

Declaring Mr Scholz's *Zeitenwende* incomplete, Mr Merz proposed a series of reforms to remedy the lack of "strategic culture" in German foreign policy, including the creation of an American-style national security council in the chancellery. Views differ on whether that would work in Germany's political system. But as one official puts it, "culture eats structure for breakfast"—meaning that if Germany really wants to get something done, it will not be hamstrung by bureaucratic arrangements.

The question is whether Germany does want to get things done. The "fundamental decisions" that will confront the next government, says Mr Masala, make this year's election comparable to that of 1949, conducted in the ashes of military defeat, and 1990, the first in reunified Germany. But this time a sense of urgency is almost entirely missing from the election campaign. In that respect, at least, the world afterwards looks rather similar to that before. ■

