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# The change of era (*Zeitenwende*) in Germany and its implications for European integration

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The Russian aggression in Ukraine, on-going since 24 February 2022, has shattered the European collective security system that was patiently built up in the 1970s and which has been consolidated since the end of the Cold War. For Germany, the return of war to European soil, a few hundred kilometres from its territory, is a stinging rejection of the policy of normalisation and openness towards the East (*Ostpolitik*) supported by Chancellor Willy Brandt (1969-1974) and to which the Social Democratic Party (SPD) and the left-wing party (die Linke) had until then been very attached.

The pacifism that permeates German society and the resulting restraint in foreign policy, a sign of German contrition for the horrors of the Second World War, are also being questioned: they could potentially lead to a 'soft' response to the aggression against Ukraine, which might then encourage further Russian attacks on Western European security. This aggression also challenges the concept of the "*Exportnation*" – the exporting nation – dear to the Christian Democrats (CDU), who gambled that trade and the interdependencies it entails would guarantee peace with Russia. Instrumentalised as a weapon of war, Germany's cheap energy supplies from its Russian neighbour, which had never been at issue – even in the worst hours of the Cold War – have become a major source of vulnerability for German economic growth.

While it was already experiencing tensions before the Russian aggression, the German foreign policy model has now entered into a period of accelerated change and new directions are taking shape, in the course of the speeches made by its Chancellor Olaf Scholz (SPD) and Ministers of Foreign Affairs

and Defence, Annalena Baerbock and Christine Lambrecht. They confirm or deny the trajectory defined in the '*Ampel*' coalition contract between the SPD, the Greens and the Liberals (FDP). The answer is threefold: at national level, certain decisions taken in response to the Russian invasion could change Germany's international and European positioning; initially, the war in Ukraine created a German-American "*transatlantic moment*", but it also has opened up strong prospects for a revival of European integration, in which Germany intends to play a leading role; for a long time an economic giant but a political dwarf, Germany seems to be abandoning the posture of restraint that characterised its foreign policy, deciding to fully deploy all the facets of its power on the European and international stage. This is both a challenge and an opportunity for the Franco-German couple in the construction of Europe.

## I. DISENCHANTMENT WITH RUSSIA AND INITIAL NATIONAL RESPONSES

### A break in relations with Russia

Due to the complex, historically rooted relationship between Germany and Russia, the former has a large community (2.7 million people in 2017) of "*Russlanddeutsche*", former German minorities who emigrated to Russia in the time of Catherine II and who returned to Germany after 1990. If we add the Russian speakers in Germany, there are about five million people living in the eastern *Länder* in particular, who are not always well integrated socially and who continued to consult the Russian media prior to the conflict.

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The political parties' programmes before the 2021 elections all advocated a continued cooperative relationship with Russia, as part of a renewed *Ostpolitik* at European level for the SPD, and in important areas such as the fight against climate change and energy. *Die Linke*, which was formed in 2007 from a merger between the former GDR communist party (SED) and the West German radical left, and the far right (AfD) refused to consider Russia as an enemy and even suggested the establishment of a collective security system including Russia. The CDU-CSU and SPD were in favour of maintaining sanctions against Russia because of its policy in Ukraine, its disinformation campaigns, its cyber-attacks, and its support for dictatorial regimes (Belarus, Syria), but they supported the Nord Stream 2 gas pipeline project. The Greens and the FDP were the most cautious towards Russia: critical of the pipeline project, they supported, if necessary, the prospect of stronger sanctions against Russia. All hoped for progress in the implementation of the 2014 Minsk Agreements between Ukraine and Russia, and all wanted to believe in the increased effectiveness of the "*Normandy Format*" of Franco-German mediation in the Russian-Ukrainian conflict.

The '*Ampel*' coalition agreement between the SPD, Greens and FDP emphasised the '*deep and multifaceted relationship*' between Germany and Russia. Given the threatening perception held by Central and Eastern European neighbours and criticising the infringement of civil liberties and democracy in Russia, it nevertheless called for "*constructive dialogue (...), based on respect for international law, human rights and the European order*". The coalition wanted to cooperate with Russia on future issues such as hydrogen, health, climate, and the environment. It also planned to liberalise visas, especially for young people, and to support international negotiations for nuclear control and eventually disarmament.

Russia's invasion of Ukraine upset these positions, and the entire German political class had to review its policy towards Russia: in early April, the President of the Republic, [Frank-Walter Steinmeier](#) (SPD), admitted: "*We have failed in our project to build a common European home (...)*" *"We continued to believe in bridges*

*in which Russia no longer believed, about which our partners had warned us."* [Friedrich Merz](#), leader of the CDU, also acknowledged "*serious shortcomings*", including within the CDU, in Germany's policy towards Russia over the past twenty years. Foreign Minister, [Annalena Baerbock](#) (*Bündnis 90/Die Grünen*), deemed at the end of August that "*there will be no turning back, the harsh reality being that Russia will remain a threat to peace and security*". The AfD and *die Linke*, which are in the minority, remain generally pro-Russian but are divided on the issue. As for former Chancellor Gerhard Schröder (SPD), his claim to be playing the role of mediator between Ukraine and Russia has been discredited by the many mandates he holds in Russian energy groups and by his proximity to Vladimir Putin.

### **Defiance of Russia and solidarity with Ukraine**

Given this situation, Germany has adopted a series of national protective measures.

### **Severance from Russian gas**

On 22 February, amid tensions with Russia, the Chancellor announced the indefinite suspension of the authorisation procedure for the Nord Stream 2 gas pipeline. In the energy mix before the conflict, natural gas was the second most important source of energy in Germany (26.5%), behind oil (34.3%) and ahead of coal (18%), but 55% of this gas was imported from Russia, compared with 35% for oil and 50% for coal. Since the conflict, Germany has sought to reduce its energy dependence on Russia (from July 2022 to 30% for gas, 12% for oil and 8% for coal). This has led to a forced march towards the energy transition: the coalition contract's target of 80% renewables in the electricity mix by 2030 has been increased to 100% renewables by 2035. But this has also pushed Germany to seek new energy partnerships with European countries (Norway, the Netherlands, Spain) as well as the United States, Canada, Mexico, and Middle Eastern countries, even if this means compromising the principles announced in the coalition programme. There is thus talk of recourse to shale gas, the extension of two nuclear power stations that were to be closed at the end of

2022, and the conclusion of an agreement with the United Arab Emirates.

### ***The rearmament of Germany: the creation of a Special Defence Fund (Sondervermögen)***

Since the collapse of the Soviet regime, Germany wanted to believe in the "*end of history*", and its military expenditure represented only 1.3% of GDP in 2021, leading to structural deficiencies in the equipment of the *Bundeswehr*. In his speech to the *Bundestag* on 27 February 2022, the Chancellor announced the creation of a special fund of €100 billion over five years to strengthen the German army. A revision of the Basic Law adopted in June by the *Bundestag* and the *Bundesrat* allows this special fund to be financed outside the federal budget, and thus to derogate from the constitutional debt brake (*Schuldenbremse*). The Greens, who would have liked to see the fund also finance non-military security investments, have agreed to concentrate its financing on military expenditure. The SPD, which was not in favour of the NATO objective of devoting 2% of German GDP to defence, succeeded in having this point removed from the Constitution and for the 2% target to be achieved through financing from the special fund and also from the federal budget. Finally, the CDU ensured the establishment of funding control mechanisms.

After five years, the federal budget will take over the equipment of the *Bundeswehr*. In all events, some €80 billion - compared to €50 billion up to now, more than in France - will be spent over five years to make the German army, according to Olaf Scholz, "*the best equipped conventional armed force in Europe*". This massive investment should benefit the German arms industry, located mainly in the north of the country, and could also benefit European defence, especially if funding is directed towards European capability projects rather than "*off-the-shelf purchases*" from the United States. In addition to these national protective measures, Germany has relaxed its national arms export policy towards Ukraine as an expression of solidarity.

### ***Solidarity with Ukraine***

The export of arms to countries involved in or threatened by armed conflict has been prohibited since the 1970s, in accordance with the [main guidelines](#) regarding arms exports. This explains why the German government initially contented itself with delivering 5,000 helmets ("defensive" weapons) to Ukraine at the end of January, provoking mockery and criticism in the ranks of the opposition: in Ukraine, the mayor of Kyiv, Vitali Klitschko, asked whether Germany would continue with shipments of pillows. The fear of being drawn into the conflict as a cobelligerent also explains this restraint.

However, Germany soon replaced the military equipment that other member states (e.g. the Netherlands, Slovakia and Slovenia) were exporting to Ukraine with German military equipment: this is the "*Ringtausch*" mechanism, which is also intended to prevent Germany from being considered a cobelligerent, but which, in the short term, tends to reduce the German defence resources.

A heated debate within the coalition showed that while the SPD was the most reluctant party overall to deliver arms to Ukraine, the Greens, the FDP and the opposition CDU/CSU called for a stronger German involvement in the Ukraine conflict. The adoption by the *Bundestag*, on [28 April](#), of a joint motion by the government coalition and the CDU/CSU opposition in favour of the delivery of heavy weapons to Ukraine (586 votes, against 100 and 7 abstentions) overcame the resistance of the Chancellor and his Defence Minister to the export of combat arms to Ukraine.

This change of era also finds expression in Germany's renewed multilateral positioning, whether this is within NATO or the European Union.

## **II. THE WAR IN UKRAINE: A TRANSATLANTIC MOMENT FOR GERMANY**

In the face of the Russian invasion of Ukraine and in the absence, as it stands, of a genuine European system of defence, it is the Atlantic Alliance that best ensures the

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security of European territory in the immediate future. Although transatlantic engagement has been a constant in German foreign policy since the Second World War, it is now more important than ever to restate this. This is reflected in the commitment to devote 2% of German GDP to defence, which has never been the case before, at the cost of "*transatlantic misunderstandings*" from the time of Henry Kissinger to Joe Biden, who reproached Germany for benefiting from the American nuclear umbrella without paying the right price. While the coalition contract provided for 3% of GDP to be dedicated to Germany's international action, understood in a broad sense - NATO, but also diplomacy and development - the commitment to reserve 2% for defence could affect Germany's other external actions.

Germany's transatlantic moment can also be seen in the decision, announced in mid-March by the Minister of Defence, to seemingly give priority to the purchase of American military equipment to replace the ageing fleet of Tornados: of course, fifteen European Eurofighters are to contribute very quickly to German defence, but there are also plans to purchase five American P-8A Poseidon maritime patrol boats and, above all, thirty-five American F35 fighter planes, which could carry a nuclear warhead if necessary. This choice helps Germany respect its commitments to "*nuclear sharing*" within the framework of NATO and to quickly benefit from protection, while waiting for the implementation of the Franco-German project for a future aircraft (SCAF), which has encountered difficulties in the distribution of contracts between manufacturers. This decision to buy the F35 could, however, have a longer-term impact, insofar as it places Germany partly in the American industrial sector. Similarly, in the field of satellites, Germany preferred the private American Space-X launcher to the European Ariane 6 rocket.

Germany is also asserting itself as a reliable ally in its eastern neighbourhood: beyond the "*roque mechanism*" for the delivery of German arms to European neighbours who export arms to Ukraine, Germany is strengthening its military presence in the new member states on NATO's eastern flank. More than 1,000 German soldiers have been deployed to

Lithuania, a country that Germany would have the task of defending in the event of a Russian attack under the Atlantic Alliance. This increased involvement is also contributing to the strengthening of the position of the German defence industry in Eastern Europe.

Anxious to overcome the economic consequences of the war by increasing trade with like-minded states, Germany could seek to revive the Transatlantic Trade and Investment Partnership in particular, which has been blocked since 2016 over issues of standards and reciprocity in market access. At the same time, like the United States, it seems to be moving towards a tougher stance on China.

However, the German government is well aware that a possible return to office by Donald Trump would end the current transatlantic moment, and what it brings in terms of security. It is in this context that Germany is seeking to place itself at the centre of a renewal of European integration.

### III. GERMANY, A DRIVING FORCE (*FÜHRUNGSMACHT*) OF EUROPE

In the 1970s, Zbigniew Brzezinski, then diplomatic adviser to US President Jimmy Carter, believed that if France was looking for the reincarnation of its power after decolonisation in the construction of Europe, Germany was looking for redemption after the atrocities of the Second World War.

The Germany of the *Zeitenwende*, as portrayed in [Chancellor Scholz's speech on 9 August](#) is no longer apologetic, but a power threatened by the consequences of the war in Ukraine, which is committed to strengthening the European Union as a provider of peace and freedom.

#### A protective European Union

##### *The security of the European territory*

In the field of European defence, the Chancellor proposes the creation of a Council of Defence Ministers, the strengthening of capability cooperation, particularly

in the field of air defence, the establishment by 2025 of a rapid intervention force and, in the medium term, of a European headquarters. However, it remains pragmatic and relatively modest, recognising the importance of coalitions of those willing, and insists on coordination and complementarity, both between the member states and between the European Union and NATO, with the strengthening of European defence presented as a means of strengthening NATO.

### **Union Enlargements and the European Political Community**

While Chancellor Scholz was initially reluctant to accept the Ukrainian, Moldovan and Georgian applications to join the European Union, he [finally deemed](#) that, in order to resist the Russian President's attempts to "divide the European continent into zones of influence, great powers and vassal states", it was necessary to consider enlarging the European Union to include these three countries that share borders with Russia, without, however, abandoning the application of the accession criteria. However, now more than ever before, the German Chancellor considers it urgent to integrate the Western Balkan countries into the European Union, which are prey to destabilising influences from Russia, China and Turkey. It seems important to him to show these countries, which have been a part of the accession process for almost twenty years, that Ukraine, Georgia and Moldova do not have a free pass. He was open to the idea launched by French President Emmanuel Macron last May of a European political community, as long as it was not an alternative to membership and that it provided real added value in relation to the existing institutions (Council of Europe, OSCE, etc.).

### **Internal Union Reform**

The prospect of further enlargements, as well as the current decision-making difficulties, notably for the adoption of the sanctions packages against Russia, make it necessary, according to the German Chancellor, to reform the European Union's operating rules. In particular, he proposes a gradual extension of qualified majority voting in the areas of common foreign and security policy (for sanctions or positions on human

rights) and fiscal policy. While Germany considers itself under-represented in the European Parliament, it also envisages a rebalancing of the distribution of parliamentary seats by Member State. Finally, without changing the principle of one European Commissioner per Member State, he proposes a somewhat obscure system in which two Commissioners would work in tandem to oversee the same Directorate-General.

Particularly proactive in defending European values and the rule of law, although he says he prefers political dialogue to legal proceedings, Chancellor Scholz suggests "*lifting the impediments*" to the application of Article 7 TEU and, in particular, systematically linking European subsidy payments to the respect of the rule of law. He also suggests that the European Commission should be able to initiate infringement proceedings against Member States that violate the rule of law and the Union's values. He thus perceives Europe not only as a project of peace, but also as one of freedom.

Finally, to ensure European sovereignty and the resilience of the European Union in the face of the economic challenges of the war in Ukraine, Chancellor Scholz is promoting a "*Made in Europe 2030*" strategy. This would involve developing European production of cutting-edge technologies (European space for mobility data, European space industry in particular), and making Europe the world's leading player in the field of climate transition, via the establishment of a genuine internal energy market (storage infrastructure networks, joint investments in new energies such as green hydrogen). This proactive industrial strategy is presented here as a tool for commercial conquest. To finance it, however, the Chancellor mentions without any great precision the mobilisation of private capital, via the completion of the European capital market, which does not augur well for a great deal of flexibility when it comes to the reform of European economic governance and, in particular, the European Stability and Growth Pact.

While the *Zeitenwende* demonstrates German momentum to assert itself on the international and European stage in the context of the war in Ukraine, it also displays internal fragilities, raises challenges,

but also offers opportunities for the recovery of the Franco-German motor in Europe.

#### IV. FRAGILITIES, CHALLENGES AND OPPORTUNITIES OF THE ZEITENWENDE FOR THE FRANCO-GERMAN MOTOR IN EUROPE

The German shift in era suffers from a major fragility linked to the fact that one man largely carries it: Olaf Scholz. The two speeches of [27 February](#) announcing the Special Defence Fund, and 29 August, setting out Germany's vision of Europe, seem to have been prepared without much governmental consultation, so as to avoid delaying positions deemed urgent by the Federal Chancellery. However, they have to contend with intense debates within the coalition, the political establishment and German public opinion regarding the risks of a nuclear escalation (an open letter from twenty-eight authors at the end of April, and poll conducted in June showing that 87% of those questioned favour diplomatic levers and that more than 50% of the Greens support military intervention). Calls for peace negotiations with Russia, a large neighbour with which it will be necessary to coexist and cooperate

in the end, are also recurrent (SPD MPs at the end of August, but also CDU). The economic impact of the war and sanctions, especially in eastern Germany, are now leading to protests against the government's economic policy and the war.

Of course, there are nuances between the German Chancellor and the French President in their approach to international and European policy: Germany is undoubtedly more Atlanticist than France, whether in terms of defence capabilities or in its approach to China. It may be tempted to prioritise trade over environmental requirements. However, the German Chancellor has largely adopted two of the French President's key initiatives, namely the notion of European sovereignty and the European Political Community. He is perfectly in tune with the motto carried by France during its presidency of the Union: recovery, power, and belonging. Franco-German work at the heart of Europe is therefore more necessary than ever before.

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