

Turning Point or Plateau?

*The Alternative for Germany at a Crossroads
after the 2025 Election*

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Abstract: This article examines the Alternative for Germany's (AfD) position following the 2025 federal election, considering whether the party is entering a stage of decline, sustaining its previous support, or moving toward greater ascendancy. The analysis assesses changes in voter demographics, regional dynamics, and issue salience to identify patterns of continuity or transformation in the party's base. We also define potential future issues, including continued dissatisfaction with the previous Ampel coalition and the grand coalition that replaced it, backlash against the end of the debt brake, and the perceived weakness of Friedrich Merz as a leader. In light of recent efforts to classify the AfD as an extremist party, the article evaluates how the party's evolving strategy and public perception may influence its capacity to shape party competition and national policymaking. Finally, it explores whether the AfD's post-2025 trajectory signals a tipping point in the normalization of far-right politics in Germany or a plateau in its influence, with broader implications for democratic stability in advanced democracies.

Keywords: Alternative for Germany, cultural identity, economic nationalism, national sovereignty, political entrepreneurship, 2025 federal election

Since its founding in 2013, the Alternative for Germany (AfD) has defied expectations about the trajectory and durability of far-right parties in post-war German politics.¹ Emerging initially as a Euroskeptic response to the Eurozone crisis, the party quickly reinvented itself around more populist and nationalist themes, capitalizing on successive moments of public discontent. The 2017 federal election marked its electoral breakthrough, as the AfD became the third-largest party in the Bundestag on the back of widespread opposition to Chancellor Angela



Merkel's refugee policies.² Subsequent elections and political crises, including the COVID-19 pandemic and economic discontent in eastern Germany, helped the party sustain a stable and at times expanding electoral base.³ By the early 2020s, the AfD was not only a permanent feature of the German party system but also a force reshaping political discourse, challenging the norms of post-war consensus politics, and contesting positions of power in state parliaments.

The 2025 federal election represents a critical juncture in the party's development. With the continued fragmentation of the party system, the weakening of the governing Ampel coalition, and visible divisions within the CDU/CSU under Friedrich Merz, the AfD entered the election with significant momentum. Subsequently, the party's vote share doubled, rising from 10.4 percent in 2021 to 20.8 percent in 2025.⁴ Yet despite this substantial gain, the AfD's polling numbers had remained relatively stable, between 17 and 22 percent in the two years preceding the election.⁵ This raises the question of whether 2025 marked the beginning of lasting ascendancy, a plateau in voter support, or a temporary peak before a broader decline. This article evaluates the AfD's electoral performance, voter base, and issue profile in 2025 to assess where the party now stands in its developmental arc. Special attention is given to changes in regional support, demographic appeal, and the party's responsiveness to emerging policy debates such as fiscal conservatism, national identity, and anti-establishment sentiment.

Beyond evaluating the election results themselves, the article situates the AfD's current position within a broader theoretical framework of party development. We consider whether the party is entering a new phase, one characterized by institutional normalization, ideological retrenchment, or electoral volatility. We also appraise how these outcomes may influence the behavior of mainstream parties and the future of democratic governance in Germany. Whether the AfD endures, expands, or erodes in the aftermath of 2025 carries implications not only for national politics but also for broader debates about political dealignment, far-right mobilization, and the resilience of liberal democratic systems in the face of populist challenges.

Theoretical Framework

The analysis of the AfD's electoral development draws on the concept of "political entrepreneurship," a framework that helps explain how smaller, challenger parties exploit structural opportunities to gain and sustain support. Political entrepreneurship refers to the strategic behavior of parties or politicians who seek to reshape political competition by identifying, framing, and promoting issues that are underemphasized or neglected by mainstream actors.⁶ In our book, *Political*

Entrepreneurship in the Age of Dealignment: The Populist Far-Right Alternative for Germany, we apply this concept to the German context by emphasizing how the AfD has systematically engaged in “issue entrepreneurship,” that is, seizing on moments of crisis (or perceived crisis) to promote distinctive positions that resonate with disaffected or underrepresented segments of the electorate.⁷ This entrepreneurial approach is not limited to capitalizing on existing issues but often involves inventing or performing crises to maximize political gains.⁸ The AfD’s success thus hinges not only on its ideological content but also on its capacity to strategically occupy and defend issue spaces that the mainstream parties have vacated or mishandled.

In the book, we propose a model of party development in three stages: emergence, breakthrough, and sustainment.⁹ Each stage corresponds to different electoral goals, organizational needs, and strategic challenges. In the emergence stage, a party seeks initial visibility and support, often around a single salient issue, as the AfD did in 2013 in response to the Eurozone crisis. The breakthrough stage involves surpassing electoral thresholds and gaining parliamentary representation, as seen in 2017 when the AfD capitalized on the refugee crisis and broader anti-immigrant sentiment. Finally, the sustainment stage refers to a party’s efforts to consolidate and normalize its position within the party system, requiring organizational professionalization, ideological branding, and electoral resilience. In this phase, the AfD maintained its relevance by adapting its messaging during the COVID-19 pandemic, refining its regional appeal (particularly in eastern Germany),¹⁰ and successfully tamping down inner-party conflict. These stages are cumulative but not necessarily linear; parties may regress or stall depending on internal cohesion and external political shifts.¹¹

The theoretical lens of political entrepreneurship is particularly relevant in the context of political dealignment. As we emphasize, dealignment has weakened traditional party loyalties, eroded the dominance of catch-all parties, and created openings for challengers like the AfD.¹² Although the behavior of German voters has evolved significantly over the past half-century, scholars note that the long-standing trend of party system fragmentation accelerated markedly over the past decade.¹³ Voters increasingly make decisions based on short-term issue salience rather than long-standing ideological commitments, allowing entrepreneurial actors to reposition the political agenda. In Germany, this has translated into a growing pool of dissatisfied voters, many of whom feel alienated from established parties and institutions.¹⁴ The AfD’s rise can thus be understood not simply as a reflection of increased voter radicalization and/or radical voter sentiment, but as the product of a transformed opportunity structure in which a nimble, polarizing actor has consistently exploited the gaps left by an increasingly fragmented and cautious political mainstream.

Stages of Political Development

The trajectory of the AfD since its founding in 2013 reflects a calculated shift in issue emphasis aligned with broader changes in the political opportunity structure. The party's initial emergence occurred in response to Germany's handling of the Eurozone crisis, which represented one of the most serious economic and political challenges facing Europe since World War II. Founded by a group of economists and former members of the CDU, the AfD's early platform centered on opposition to European monetary integration, particularly the bailout packages for Greece and other struggling Eurozone economies.¹⁵ The AfD articulated a vision of economic nationalism that combined fiscal conservatism with a technocratic critique of elite decision-making within the European Union. Although narrowly missing the 5 percent threshold required for Bundestag representation in 2013, the AfD capitalized on public unease about economic risk sharing and German taxpayer liability, positioning itself as a voice for national sovereignty within the EU framework. Between 2014 and 2017, the AfD entered almost all state parliaments, demonstrating its ability to convert economic discontent into electoral gains at the regional level.

By 2017, the party had undergone a significant ideological transformation, shifting its focus from economic topics to cultural and identity-based issues. This breakthrough phase was defined by the AfD's response to the refugee crisis and its critique of Chancellor Angela Merkel's asylum policies. The party's messaging emphasized immigration skepticism, national identity, and public safety, tapping into widespread anxiety in the wake of the large-scale arrival of asylum seekers beginning in 2015. The AfD's ability to frame immigration as a crisis of national control enabled it to attract support from both traditional conservatives and disaffected voters across demographic groupings.¹⁶ In the 2017 federal election, the party entered the Bundestag for the first time with 12.6 percent of the vote, becoming the largest opposition party and fundamentally altering the post-war German party system.

Following its parliamentary breakthrough, the AfD entered a sustainment phase in which it sought to stabilize and expand its support base. This period included internal organizational development, a consolidation of leadership around more radical factions, and increased efforts to tailor messaging to regional contexts, especially in eastern Germany.¹⁷ The party's response to the COVID-19 pandemic was a key episode in this stage.¹⁸ Unlike mainstream parties, the AfD opposed lockdowns, vaccine mandates, and other public health measures, framing them as infringements on individual liberty and government overreach. Although this strategy attracted criticism, it also helped the AfD maintain a distinct anti-establishment identity and mobilize segments of the electorate frustrated with

pandemic governance. Unlike other parties, the AfD held no positions in state coalition governments and was therefore entirely shut out of pandemic decision-making at the state level. As a result, the AfD was uniquely positioned to oppose pandemic-related decisions made by state governments. The 2021 federal election yielded a slightly diminished national result at 10.4 percent, but the party remained strong in eastern states, indicating that regional entrenchment rather than broad-based national growth had become its principal path of sustainment. The fluctuation in vote share is a normal aspect of party development, and no party, particularly one reliant on protest and opposition, can expect continuous growth. For the AfD, the 2021 result suggested the limits of its national appeal even as it deepened its foothold in regional strongholds.

The Federal 2025 Election

The 2025 federal election marked a significant moment for the AfD, with the party securing 20.8 percent of the vote, its highest national vote share to date and nearly double its result from 2021. This outcome solidified the AfD's position as one of the major parties in the German system, although it remained outside the realm of coalition politics at the national level and (currently still) state level. The result reflected both long-term structural trends, including continued voter dealignment and regional polarization, and short-term factors specific to the 2025 campaign context. Notably, the AfD made significant inroads in western states while reinforcing its dominance in the east, where it emerged as the leading party in all five Länder.¹⁹ This electoral performance raised critical questions about whether the party was entering a new phase of ascendancy or merely capitalizing on a high point within a limited electoral ceiling.

Exit polls demonstrated that the demographic profile of AfD voters in 2025 showed both continuity and modest expansion.²⁰ The party continued to draw a larger share of men (although a substantial share of women also voted for the party), voters with lower levels of formal education, and residents of eastern Germany. Compared to earlier election cycles, the AfD increased its support across all age groups, rather than gaining primarily among younger voters. In fact, the youngest age group ranked only fourth in terms of its level of support for the party (depending on how age categories are grouped), despite widespread speculation that platforms such as TikTok would significantly expand the AfD's reach among young voters.²¹ This broadening support suggests that the party's messaging on economic discontent, national sovereignty, and cultural identity resonated beyond its traditional protest base. In addition, the AfD gained support among former CDU/CSU voters, particularly those dissatisfied with the perceived moderation and

indecisiveness of Merz's leadership. In fact, only 43 percent of Germans reported that Merz was chancellor material.²² These potential gains indicate an erosion of the traditional conservative bloc and highlight the AfD's growing appeal among voters who previously identified with the political center-right.

As with elections prior, issue salience played a crucial role in shaping the AfD's electoral success in 2025. Dissatisfaction with the outgoing Ampel coalition, especially over economic policy and internal disagreement on immigration and energy, created fertile ground for opposition messaging. The party's campaign emphasized national self-determination, opposition to climate policies (framed in both economic and "moral" terms), and criticism of the government's handling of inflation and public debt.²³ The potential end of the debt brake and debates over fiscal responsibility provided the AfD with a renewed opportunity to frame itself as a defender of economic prudence. Migration remained a central concern for voters, with widespread calls for reform amid perceptions of state incapacity and rising numbers of asylum applications. The AfD also capitalized on growing public fatigue with Germany's support for Ukraine, questioning the long-term costs of military aid and refugee resettlement.²⁴ At the same time, Merz's failure to consolidate conservative support and the internal fractures within the CDU/CSU allowed the AfD to capture disillusioned center-right voters. While the AfD's issue focus remained rooted in populist opposition to elites and mainstream consensus, its ability to blend cultural and economic grievances in a time of political uncertainty help to explain its strong showing in the 2025 federal election.

Possible Future Developmental Stages for the AfD

The AfD's performance in the 2025 federal election presents multiple possible trajectories for its future development. With its highest-ever national vote share, the party has strengthened its position within the German party system. Yet it remains unclear whether this moment represents the beginning of long-term transformation or a temporary peak. This section considers three plausible paths forward, each shaped by structural opportunities, party strategy, and responses from the political mainstream.

(Continued) Sustainment

The AfD may be entering a period of consolidation in which it sustains its current level of support without significant growth or decline, albeit with some minor fluctuations in support. The party's 2025 success builds on a pattern of regional strength, especially in eastern Germany, and a steady national presence supported by its anti-establishment posture. The collapse of the Ampel coalition, growing

frustration with inflation and fiscal instability, and widespread dissatisfaction with the CDU/CSU under Merz, exemplified by his failure to secure a chancellorship vote on the first attempt, have all reinforced the AfD's narrative of establishment failure.²⁵ The end of the debt brake has further strengthened the party's economic messaging, allowing it to present itself as the sole voice of fiscal responsibility, leaving aside the now almost irrelevant Free Democratic Party (FDP).²⁶ If the AfD continues to maintain cohesion and adapts its messaging to emerging issues while preserving its core themes, it could remain a stable fixture in the political landscape.

Ascendancy

A more transformative scenario involves the AfD entering a phase of electoral and institutional ascendancy. In this scenario, the party continues to expand its support base across regions and social groups and begins to exert influence over national policy, either indirectly, through participation in state-level coalitions, as a blocking minority in the Bundestag, or (more dramatically) through a future federal-level coalition government (as accomplished by far-right parties in Finland, Sweden, and several other European countries). The erosion of traditional party loyalties and the inability of the CDU/CSU and the SPD to offer compelling alternatives or simply "get things done" may open new space for the AfD to position itself as a viable governing actor. Since the 2017 election, the party has moderated its tone in select western states while intensifying its populist appeals in others. Its response to the suspension of the debt brake has blended conventional budgetary conservatism with a more radical populist critique of elite mismanagement, drawing comparisons to the fiscal messaging of the MAGA movement in the U.S. Recent reports have also detailed the AfD's internal strategy to grow its influence by focusing on regional consolidation, messaging discipline, and candidate recruitment, particularly in eastern Germany.²⁷ If the AfD can balance institutional credibility with its outsider identity, and if public discontent deepens, the possibility of an ascendancy into formal governance becomes more realistic.

As of January 2026, the AfD is polling at roughly the same level as the CDU/CSU (around 26 percent) at the federal level and between 35 and 40 percent in several eastern German states that hold state elections in 2026, placing it in direct competition for the position of Germany largest party.²⁸ Ascendancy would become more plausible if this electoral parity were to coincide with a weakening of the *Brandmauer* (firewall), allowing other parties to justify cooperation with the AfD on the grounds of its status as the largest or co-largest party. There is emerging evidence that voters of competing parties are becoming more open to such cooperation, particularly in contexts where the AfD is perceived as an unavoidable parliamentary actor.²⁹ Interestingly enough, if the AfD were to gain the absolute majority of seats in upcoming state elections in Mecklenburg-West Pomerania

and Saxony-Anhalt, there would be no need for a coalition with the Union parties. This is a double-edged sword for the AfD, however. A quasi-firewall might stay in place if the CDU/CSU is consigned to the opposition and works with other parties to obstruct the AfD's agenda. Thus, it might be advantageous for the AfD to secure a solid plurality of votes but not enough for an absolute majority.

Decline

Despite these opportunities, the AfD also faces significant risks that could lead to a decline in support. First, the party continues to face institutional challenges, as the Federal Office for the Protection of the Constitution (BfV) recently classified the AfD as an extremist organization, although the designation has been temporarily suspended.³⁰ Such classification could alienate moderate voters and curtail the party's activities. Second, internally there exist persistent tensions between radical and (more) moderate factions that could erupt into public conflict, which would undermine the party's image and organizational strength. This is in addition to inner-party conflict over recent nepotism scandals in several of the AfD's state party organizations. Third, shifts in the issue agenda may weaken the AfD's appeal. A reduction in the salience of immigration, a rebound in economic performance, or successful repositioning by the CDU/CSU could all deprive the AfD of its comparative advantage. If mainstream parties begin to absorb protest voters through stronger leadership and more responsive platforms, the AfD may find itself unable to reproduce its 2025 success. Taken together, these dynamics suggest that the AfD's recent gains remain contingent rather than self-reinforcing, which leaves the party vulnerable to stagnation or decline if external conditions shift.

Which Stage Is Most Likely to Occur in the Future?

At present, the most likely trajectory for the AfD is continued sustainment. While the party has achieved unprecedented electoral success and current polling shows a slight increase from the 2025 federal election results, its long-term growth remains constrained by the enduring stigma attached to its brand. A decisive majority of the German electorate continues to view the AfD as an unacceptable choice under any circumstances, limiting the party's potential for broader appeal. This stigma not only rules out the prospect of the AfD securing a chancellorship but also ensures that it remains excluded from coalition negotiations at the federal level. As a result, the party is likely to remain in the sustainment stage in the short to medium term, maintaining its current level of support and reinforcing its role as a protest vehicle rather than a governing force.

Over time, however, the lack of any real influence at the federal level could have spillover effects, diminishing enthusiasm among supporters or prompting voters to view the AfD primarily as a regional or state-level actor. Voters may also

begin to shift their support to parties with a realistic chance of entering government, especially if dissatisfaction with the status quo remains high and other alternatives appear more viable. If core supporters come to see the AfD as permanently shut out of national policymaking, disillusionment could grow, potentially pushing the party into a period of decline. This pattern has been observed in other protest-oriented or outsider parties in both German and broader European contexts, where long-term exclusion from power has often led to stagnation or decline.³¹ Conversely, even if the *Brandmauer* were to weaken and the AfD were to enter a federal coalition, the party would confront the challenge of governing, a transition that has frequently constrained far-right populist parties once protest appeals give way to responsibility.

Implications for German Politics

The formation of a new grand coalition between the CDU/CSU and SPD has not resolved the discontent that emerged under the Ampel government and may face its own legitimacy challenges if voter frustration persists. The AfD's sustained strength in the 2025 federal election is likely to have lasting effects on the strategies and positioning of Germany's mainstream parties. For the CDU/CSU in particular, the AfD's success has intensified internal debates over how to respond. Some within the conservative bloc have called for a harder stance on immigration, law and order, and cultural issues in an effort to win back voters who have shifted to the AfD. As Matthias Dilling notes, significant overlap in the policy positions of the AfD and the CDU/CSU was already evident by the time of the 2017 federal election.³² Others remain committed to upholding a strict separation from the far right, concerned that any form of accommodation would legitimize a party still under scrutiny for extremist tendencies.

Indeed, some scholars question whether the AfD's voters are even available to mainstream parties.³³ On the left, Die Linke staged a surprise rebound in 2025 after a difficult 2021 election,³⁴ which demonstrates that there remains an appetite for left-wing populist alternatives, particularly among economically disaffected voters in the east. This resurgence, along with the short-term breakthrough of the BSW (Sahra Wagenknecht Alliance, but slated to be renamed the Alliance for Social Justice and Economic Rationality),³⁵ may complicate the AfD's efforts to monopolize protest sentiment and could pressure the SPD and Greens to sharpen their messaging on social justice and economic inequality. Across the political spectrum, the AfD's performance is prompting a reconsideration of messaging, coalition strategies, and voter engagement.

The presence of a strong far-right party has clear implications for political stability in Germany. While the institutional framework remains durable, the AfD's

growth has intensified polarization and exacerbated regional divides, particularly between eastern and western states. In the east, the AfD now leads in many polls and has gained influence in state and local governance. This growing presence is testing political norms related to cooperation, party exclusion, and democratic accountability. At the national level, the persistent refusal by all other parties to consider the AfD as a coalition partner has complicated government formation and weakened the role of parliamentary opposition. Over time, this situation may contribute to a broader sense of political dysfunction or exclusion, especially among AfD supporters, potentially undermining trust in democratic institutions.

Even outside of government, the AfD has significantly influenced Germany's political agenda. The party has been instrumental in shifting debates on immigration, national identity, and sovereignty from the fringes to the center of political discourse. For instance, following the 2025 federal election, Chancellor Merz's administration (under the immigration hardliner Alexander Dobrindt of the CSU) has sought to implement stricter border controls and policies to curb illegal migration, including turning away undocumented migrants at the border. This policy shift reflects the AfD's impact on mainstream parties' stances on immigration.³⁶ The AfD has also contributed to the politicization of previously consensual issues, such as climate policy. The party's opposition to Germany's climate initiatives has resonated in conservative and rural areas, leading to a broader backlash against the Green Party's agenda. This backlash has pressured other parties to reconsider their positions on environmental policies.³⁷ At the state level, particularly in regions like Saxony and Thuringia, the AfD's presence has influenced legislative priorities. The party's electoral strength has complicated coalition-building efforts and influenced leadership votes in state parliaments, often forcing mainstream parties to form awkward or unstable alliances to avoid working with the AfD.³⁸ These dynamics emphasize the AfD's ability to exert policy influence without holding formal power. As long as the AfD maintains its electoral support and distinct ideological identity, while not being viewed as too extreme by potential swing voters, it will continue to challenge the traditional boundaries of Germany's post-war political consensus.

Conclusion

This article has examined the AfD's position following the 2025 federal election and situated it within the party's broader developmental arc. We reviewed the AfD's emergence during the Eurozone crisis, its breakthrough in the context of the refugee crisis, and its strategies of sustainment in the years that followed. The 2025 election result, in which the party doubled its national vote share to 20.8 percent,

represents a major milestone but not necessarily a turning point leading to governance. While the AfD's support has clearly expanded, its long-term trajectory remains uncertain due to persistent political stigma, exclusion from coalition politics, and structural limitations on its influence. At present, the most plausible scenario is continued sustainment (so long as the firewall holds), although longer-term decline remains possible if supporters begin to view the party as permanently shut out of power.

Efforts to categorize the AfD as an extremist organization have added a new dimension to the party's future prospects. In 2024, Germany's domestic intelligence agency reaffirmed its classification of the party's youth wing and several regional branches as right-wing extremist.³⁹ Meanwhile, public debate over banning the party has intensified, with recent polling showing that nearly half of Germans would support such a move.⁴⁰ However, these developments have coincided with a rise in AfD polling numbers, likely driven by frustration with the collapse of the Ampel coalition, dissatisfaction with the suspension of the debt brake, and the perceived weakness of Merz's leadership, as well as signs of disillusionment with the newly formed grand coalition. This paradox highlights a central tension in the AfD's position: it remains institutionally isolated yet politically potent. This may help explain why the BfV labeled the party as extremist in May 2025, only to walk back the designation a few days later.⁴¹ What remains to be seen is whether institutional efforts to contain the AfD will limit its appeal or, instead, reinforce its narrative as a persecuted outsider and further deepen its support.

Future research should explore how sustained exclusion from governance affects the behavior of far-right voters and activists in Germany. Comparative studies might also examine whether the AfD follows a path similar to other European far-right parties that have either normalized and joined coalitions or stalled due to political isolation. Furthermore, the role of mainstream party missteps, especially within the CDU/CSU, should remain a key focus for scholars of political competition and party systems.

The AfD's trajectory will continue to shape not only German politics but also broader patterns in European democracy. The party's ability to maintain or expand support without access to governing coalitions challenges conventional expectations about the limits of populist parties. Whether the AfD ultimately declines, sustains its position, or ascends to greater influence will offer insight into how far-right parties adapt to exclusion, institutional pressure, and evolving political opportunities. As Germany navigates a period of political uncertainty, the AfD's role will remain a key indicator of the resilience of the post-war political order.

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Notes

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 21. One of this article’s authors was contacted by multiple journalists leading up to the election seeking comment on the claim that younger voters were driving support for the AfD. In response, the author pointed to exit poll data from the 2024 European Parliament elections showing that younger voters did not support the AfD at higher rates than other age groups and that the party’s gains were consistent across demographic categories. He also highlighted how this idea had become a news narrative

- without any evidence to support the claims. Despite this clarification and a willingness to provide further information, the journalists did not follow up or respond to subsequent e-mails. Several of the resulting articles nevertheless advanced the narrative of a youth-driven AfD surge without offering empirical evidence to support the claim.
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