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# Election update Germany – polls stable despite harsh migration debate

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**Just under three weeks before the Bundestag elections, the polls have changed little to date – despite the harsh debate on migration policy and how to deal with the AfD. The CDU/CSU are likely to be by far the strongest parliamentary group in the Bundestag after the elections, and together with the SPD or the Greens they would probably have a clear majority in the Bundestag. However, the coalition negotiations are unlikely to have been made any easier by the disputes of recent days.**

## Hardly any movement in the polls ...

In the past week, the projections of the seven opinion research institutes we are covering have once again hardly changed. The results of CDU and CSU are trending downwards slightly, while the AfD is trending slightly upwards (Chart 1). The average values for the SPD and Greens have hardly changed despite movements in individual projections, and the smaller parties “Bündnis Sahra Wagenknecht” (BSW), the Liberals (FDP) and the Left Party are all in danger of failing to reach the 5% hurdle. The Left Party’s hopes of re-entering the Bundestag by winning three direct mandates have recently been dampened. According to a detailed forecast for the individual constituencies, it will only win two direct mandates.[1]

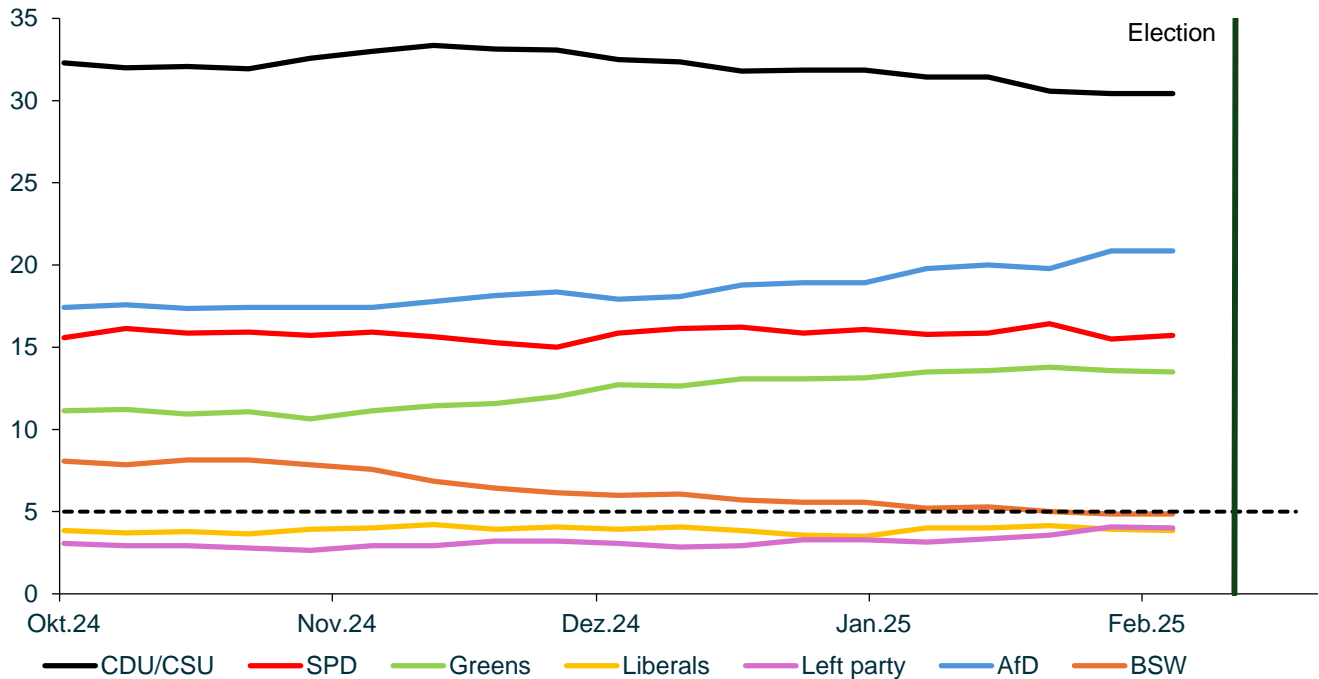


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**Chart 1 - CDU/CSU still with a big lead**

Parties' share of the vote in the next general election, average of the most recent projections by 8 opinion research institutes, in percent



Source: wahlrecht.de, Commerzbank Research

**... despite the CDU/CSU “breaking a taboo”**

The discussion on asylum policy, which dominated the news last week, has hardly changed voting intentions so far. As a reminder: the CDU/CSU had introduced proposals to tighten asylum policy in the Bundestag and, in the face of opposition from the SPD and Greens, accepted the risk of gaining a majority with the votes of the right-wing AfD. While the SPD and Greens saw this as a breach of the taboo on cooperation with the AfD, the CDU/CSU candidate for chancellor, Friedrich Merz, pointed out that there had been no agreements with the AfD, but that they had merely agreed to a from his point of view factually necessary motion from his parliamentary group.

Of course, it is possible that this discussion will be reflected in the polls with a delay in the coming days. So far, the evidence is mixed at best. While one institute did find a change in the answers of respondents before and after the vote in the Bundestag, another survey, which was mainly conducted after the events in the Bundestag, did not show any significant shifts compared to the previous surveys. So far, the unease of some voters about working with the AfD seems to be outweighed by the fact that a majority of voters generally agree with the Union parties' proposals, according to polls.

**A problem for coalition negotiations?**

Of course, experience has shown that many conflicts between the parties that are sharply fought during the election campaign are quickly resolved after the election through compromises in order to forge a coalition. This would also be made easier if the smaller parties – as in the average projections – failed to enter the Bundestag. This is because the CDU/CSU would then only need one coalition partner, meaning they would only have to agree on a joint government program with the SPD or the Greens.



However, the negotiations are unlikely to have been made any easier by last week's dispute. In addition to the very different ideas on economic policy, there is now the open conflict on migration policy, especially as Friedrich Merz has "guaranteed" his voters a turnaround in these areas.

### **Former publications on the general election 2025:**

- ["What happens to the debt break?"](#), Economic Insight 21 November 2024
- ["Election update Germany – Upper house a big hurdle for the next government"](#), Economic Insight 2 December 2024
- ["Election update Germany – Will the SPD succeed in catching up?"](#), Economic Insight 11 December 2024
- ["Election update Germany – The plans of CDU and CSU"](#), Economic Insight 17 December 2024
- ["Election update Germany – Who will be in the next parliament?"](#), Economic Insight of 17 January 2025
- ["Election update Germany – Will the migration debate move the polls?"](#), Economic Insight of 27 January 2025

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[1] A direct mandate is the parliamentary seat won by the candidate with the most votes in one of the 299 constituencies. Since the representation of the parties in the 630 seat strong Bundestag is determined by their relative vote share, not every winner in a constituency is necessarily guaranteed a seat in parliament, however [\(back to text\)](#)



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