



Security Radar 2025

Europe – Lost in Geopolitics

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Foreword

Europe is in danger. Some 80 years after the Second World War, geopolitics have once more morphed into armed conflict on our continent, claiming lives daily in Ukraine. Russia's full-scale war has resurrected the ghosts of Europe's past we hoped had been put to rest long ago. This year, another anniversary calls to mind lost opportunities. August 2025 marks 50 years after the signing of the Helsinki Final Act, which established a European security settlement blending confrontation and cooperation based on shared principles. The finely woven web of international institutions and agreements that has ensured the peace on our continent is in existential crisis. Not only that, but far-right forces are seeking to undermine the institutions, laws and norms carefully built up over decades from within.

In these dangerous times, the Friedrich-Ebert-Stiftung's Security Radar aims to convey the concerns, priorities, fears and hopes of those most affected by today's geopolitical milieu. Our survey of 14 countries, including the two warring parties, offers valuable insights. In a nutshell, people in all the surveyed countries are deeply afraid and concerned, with a grim outlook on peace. There is growing recognition that the world is undergoing significant changes, although the direction remains unclear. What is evident, however, is that Europe is increasingly perceived as a more and more dangerous place, afflicted by wars and conflicts, and with further challenges to come. Our countries, societies and decision-makers seem lost in geopolitics.

Two only partially compatible reactions to this changing world are evident. On one hand, people are tending to look inward, concentrating on their own country and shying away from international affairs. Populist forces are driving this inward shift and it is fuelling them in turn. They promise easy solutions and are eager to dismantle democratic institutions. On the other hand, people retain a degree of trust and hope in international organisations, together with a fair amount of pragmatism. People remain open to cooperation even with countries that do not share their values, in pursuit of higher goals such as peace.

This publication comes at a pivotal historical moment. The binding force of international law has been eroding for years. Russia is now openly pursuing an agenda aimed at dismantling it even further. In the United States, a new administration threatens to erode or even end Washington's key role in European security, perhaps for good. International organisations or cooperation in general rank low on President Trump's agenda. His open questioning of the very



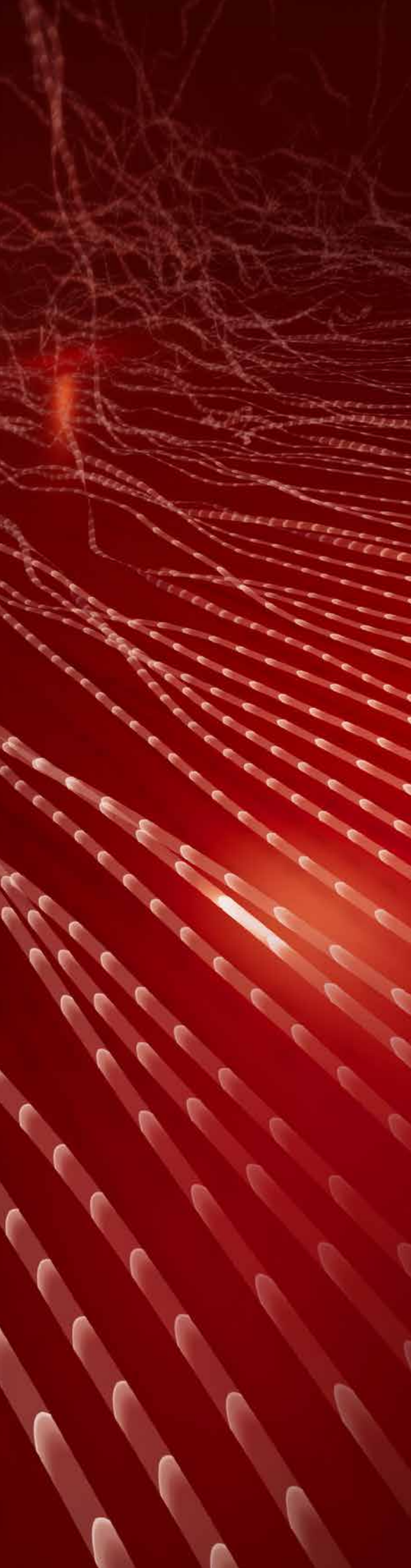
Martin Schulz
Chairman of the Friedrich-Ebert-Stiftung
© FES/Reiner Zensen

legitimacy of international law, as evidenced by claims to Panama, Canada and Greenland, signals a troubling trend of »negotiable principles«.

Meanwhile, Europe's major powers are embroiled in domestic challenges. Poland faces presidential elections, whereas in France successive prime ministers have been trying their luck in finding parliamentary majorities. Germany is in the midst of an election campaign, following the collapse of the previous government, partly due to disputes over how to finance support for Ukraine.

Finding a way out of this conundrum is a task of historic proportions. Public priorities can and should guide decision-makers in this quest. Social cohesion and defence expenditure are both key to maintaining democratic stability. Strong international institutions and rules will be needed to cope with global challenges. Prioritising the end of the war against Ukraine, while securing Ukrainian sovereignty long term, must be the first step. The ultimate goal remains a European security order that transcends the zero-sum logic of current geopolitics and avoids repeating the mistakes of the past. After all, we have been here before. Fifty years ago, the Helsinki Final Act demonstrated that, even in times of deep division, cooperation and the pursuit of shared principles could lead to tangible progress and a more stable order.

I sincerely hope that this survey receives the attention it deserves and that it resonates with both political leaders and the public loud and clear.



Introduction

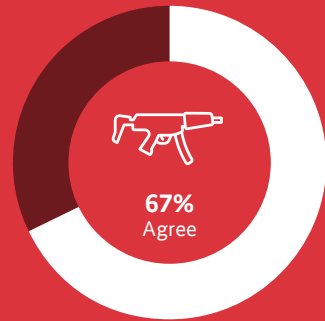
Key Findings

Overview

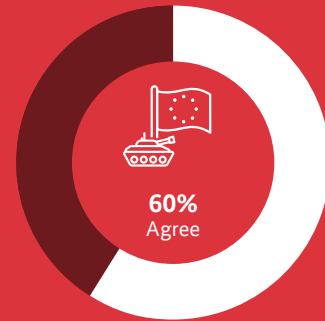
Research Design

Key Findings

1 The world is entering an **era of war and conflicts**. The uncertainty is felt broadly throughout the OSCE area and people fear that new wars in Europe are likely.

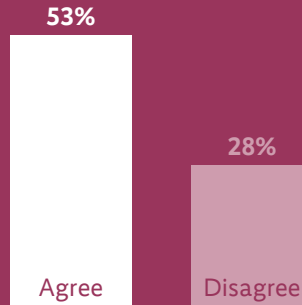


'An era of wars and conflicts is emerging.'



'In view of increasing tensions between Russia and the West, I think new wars in Europe are likely.'

2 The new **»Cold War«** between the **United States and China** is characterising the emerging world order for a majority of respondents.



'A new »Cold War« is emerging between China and the US, and all other states will have to choose sides.'

5 In Russia we can still observe a **diversity of opinions**.



52% of those below 40 years of age deem it acceptable for Russia to **recognise Ukrainian sovereignty**.



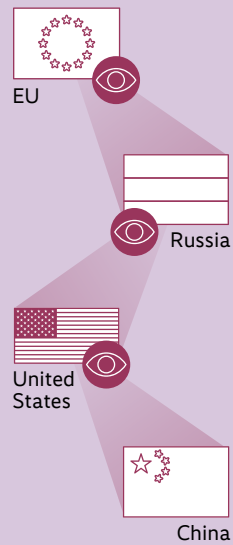
62% of Russians believe that their country has **become stronger** through the war against Ukraine.

7 A majority of people expect either a **diplomatic solution to Russia's war against Ukraine**, with both sides agreeing on a compromise, or **do not believe that the war is going to end soon**. In Russia and Ukraine, there is a clear desire for negotiations.

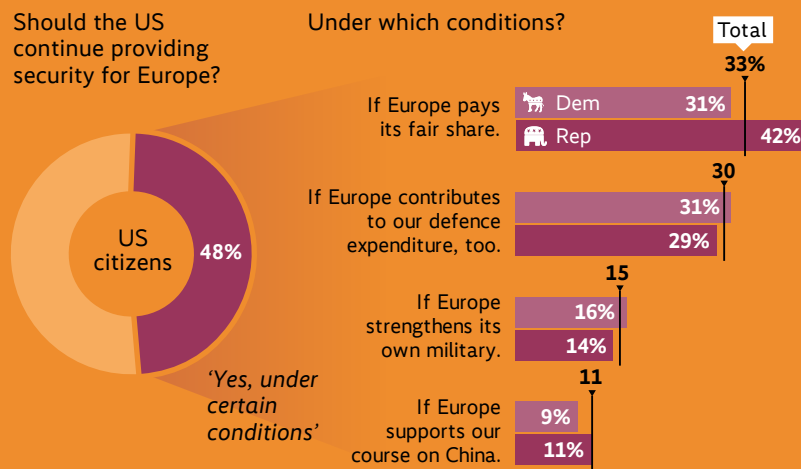
How do you believe this war is going to end?



3 The landscape of global security is changing rapidly and the European security order is becoming complicated. In most **EU countries**, **Russia** is perceived as the main danger, for **Russians** the **United States** remains the clear adversary, and **Americans** focus on **China**.

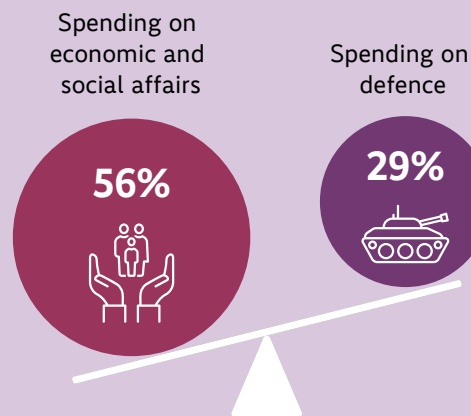


4 The role of the United States in European security is contested among US citizens. Providing unconditional support for European security is **no longer favoured by a majority of US citizens**.

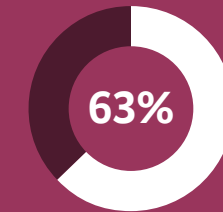


6 Balancing defence expenditure and social spending will be the key question for **upholding societal cohesion** in an era of increasing military spending. Innovative measures need to be taken.

48% of all respondents prefer a **special levy on the rich** to finance growing defence spending.



8 Europeans want **more independence** from the US, but feel vulnerable without them.



of the polled Europeans agree that the EU should become **increasingly independent from the US**.



Policy recommendations



Strength starts at home

Strengthening social cohesion represents a sustainable investment in a society's ability to navigate the looming challenges emerging from the polarised and rather hostile international environment. Resilient democracies, trust in institutions and a vision of the future are therefore as important as armaments when it comes to upholding security in Europe.



Take Europe seriously

A united European Union is far better equipped to deal with international challenges than individual member states. Playing economic hardball with the US and China, deterring Russia and maintaining living standards are more likely to succeed in an EU based on cooperation.



Cooperative security is a necessary stabiliser

Cooperative security might not be in vogue currently, but it remains a necessary stabilising element in a world close to coming off the rails. The prevalent geopolitical logic of competition and confrontation needs to be stabilised with pragmatic cooperation.



Prioritise ending the war against Ukraine

Policymakers need to take steps towards ending the war and commence a negotiation process. Two elements can guide this: a broader international coalition for negotiations can be built by focussing on Russia's breaches of international law. The key issue for negotiations needs to be Ukraine's long-term sovereignty.

Overview

Security Radar 2025 is the fourth edition of a survey first conducted in 2019, then again in 2021 and also in 2022 in selected countries across the OSCE space. It is a representative public opinion survey aimed at capturing citizens' attitudes on a broad array of foreign and security policy issues. The focus of this year's edition is clearly the war against Ukraine and its repercussions for European security.

This year's Security Radar revisits the last 14-country edition, which was presented in 2022 at the Munich Security Conference just days before Russia invaded Ukraine. We wanted to see how attitudes have changed three years on, and thus included almost the same set of countries: Germany, France, Italy, Latvia, Poland, Russia, Serbia, Sweden, Türkiye, the United Kingdom, Ukraine and the United States. Only three countries are »new«, featuring in the Security Radar for the first time: Sweden, a country that recently joined NATO in response to Russia's attack on Ukraine; the Central Asian state of Kazakhstan, which is a close ally of Russia, but condemns its war against Ukraine; and Georgia, a South Caucasian nation that was granted EU candidate status in December 2023 and has been rocked by mass protests since the current government's reversal of the decision to hold accession negotiations. We added these three countries because Europe's reach and agency (»actorness«) is visible not only internally and in its alliances, but also outside its borders.

Security Radar 2025 builds on a representative public opinion poll conducted in 14 countries. The poll takes stock of mutual threat perceptions and attitudes to domestic and multilateral institutions, and foreign policy priorities, as well as to a range of instruments, such as diplomacy and military and economic sanctions. It highlights core issues for European security, such as the ongoing war against Ukraine, which is overshadowed by Russian threats of escalation, relations with Russia and questions about cooperation and confrontation.

The report appears at a time of alarming instability on the European continent. Russia has been waging war on Ukraine for nearly three years, and has even corralled North Korean soldiers to serve as boots on the ground. The polarisation between Russia and the »West« has produced tensions not seen since the end of the Cold War, with subversion and sabotage resurfacing, threatening the arteries of the globalised economy. A confrontational order seems to be developing, forcing countries and societies to make hard choices. Georgia and Moldova have been showcases for such choices. The most recent elections in both countries polarised societies and deepened existing societal fractures. And to Europe's southeast, Hamas's 7 October 2023 assault on Israel led to a sharp escalation in violence and

significant shifts in power dynamics within an already fragile and fragmented regional order.

Many societies in the OSCE area are struggling to navigate this new and dangerous international environment. Prospects for the future seem gloomy, fears of wars and conflicts are rising. Russia's war against Ukraine has magnified many of the upcoming challenges. Questions and possible solutions regarding the future of the European security order centre on this war. The survey shows how the war is perceived, the stances of different parts of society towards it and how it is intertwined with broader questions concerning the international system. Our data highlight the different coping strategies, whether it be an inward-turn sometimes bordering on isolationism, a focus on narrowly defined national interests or, paradoxically, a strengthening of international organisations. The political recommendations incorporate these views.

Despite the current trend towards competition and confrontation, we maintain the importance of cooperative approaches in international security. Including such thinking within the framework of confrontational approaches will be needed for the prevention, as well as the resolution of conflicts, and for tackling planetary challenges affecting us all, first and foremost climate change.

Citizens' perspectives are central and important. Ordinary people deserve some say in the running of their countries and politicians need input from public opinion to make informed decisions, particularly in times of alarming instability and high uncertainty. Results from different editions of the Security Radar map the shifting landscape of European security policy. Decision-makers across all polled countries have to cope with the emergence of new fears and anxieties among the public. At the same time, they can build upon broad public support for a pragmatic policy geared towards limiting the repercussions of the war, and prioritising peace and security in Europe.

The report has four parts. The first part provides an overview of the research design. The second part presents the cross-country data in a comparative matter. Wherever possible, it shows the evolution of public opinion over time (comparison of attitudes in 2021, 2022 and 2024). The third part zooms in on the 14 polled countries and draws attention to their idiosyncrasies. The final, analytical part distils the key patterns and arguments emerging from the data, takes a closer look at the prospects for peace and cooperation, and offers some policy recommendations.

Research Design

Public opinion may have a substantial impact on political decision-makers facing security issues, particularly at a time of high tensions and major uncertainty. The aim of Security Radar 2025 is to explore changes in public opinion since Russia's invasion of Ukraine in February 2022. To this end, we compare two surveys: Security Radar 2022, conducted in 14 countries in autumn 2021, and so before the beginning of the war, and published at the Munich Security Conference just a few days before the invasion; and the present Security Radar 2025, conducted three years later. We thus compare people's attitudes directly before the invasion with attitudes almost three years into the war. For four EU members – France, Germany, Latvia and Poland – we have three data points to compare (as these four countries featured in the follow-up Security Radar 2023, which explored changes in public attitudes nine months into the war, in autumn 2022).

Security Radar 2025 is a representative public opinion poll conducted in September 2024 among the resident populations in 14 countries: *Germany, France, Georgia, Italy, Kazakhstan, Latvia, Poland, Russia, Serbia, Sweden, Türkiye, United Kingdom, Ukraine, United States.*

Survey

The aim of the survey is systematically to investigate people's attitudes, opinions and values in relation to the current security and foreign policy situation in Europe, with a

particular focus on the war against Ukraine. By »Europe« we understand the space covered by the members of the Organization of Security and Cooperation in Europe (OSCE). In certain obvious cases, however, we use »Europe« interchangeably with »the EU«. When we use the term »the West«, we mean the EU together with the USA.

The pollster Ipsos Public Affairs in Berlin was assigned to carry out the fieldwork in twelve of the fourteen countries; in Georgia, the fieldwork was carried out by Caucasus Research Resource Center (CRRC). In Russia, the fieldwork was conducted by an independent pollster, whose name we decided not to disclose because of the risk of criminal liability.

The survey is based on the Security Radar 2023 questionnaire, adapted and extended in line with developments related to Russia's war against Ukraine. Overall, we explore and compare public opinion on the current security and foreign policy situation in Europe, focusing on seven aspects:

1. perception of the current threat situation;
2. attitudes towards foreign and security policy;
3. attitudes towards international organisations;
4. attitudes towards national identity;
5. attitudes towards the EU, the United States, NATO, Russia and China;
6. perception of Russia's war against Ukraine;
7. perception of climate change and its effects on security in Europe.

Polling during wartime

Conducting polls during wartime presents significant challenges, requiring cautious interpretation of the results. In Ukraine, ongoing hostilities in Crimea, Donetsk and Luhansk regions prevented their inclusion in the sample, affecting the survey's representativeness. The war has also altered Ukraine's demographics, with millions of people, particularly women, leaving the country and many men serving at the front.

Wartime conditions also increase the likelihood that people will provide what they perceive to be socially desirable responses, potentially skewing results. This may especially be the case in Russia, where repressive laws exacerbate this tendency. Despite these challenges, including Russia and Ukraine in the Security Radar survey remains crucial because of their significant roles in European security. The survey was last conducted in Russia and Ukraine in 2021, a few months before the full-scale invasion.

In Ukraine, Ipsos gathered data via online questionnaire. To gather data in Russia, an independent polling company was commissioned, although its identity is withheld to protect it from potential prosecution, given the Friedrich Ebert Foundation's »undesirable organisation« status in Russia. The poll was conducted via telephone, with a shortened questionnaire and some terms adapted to ensure respondents' safety and from political considerations (for instance, the term »special military operation« was used instead of »Russia's war against Ukraine«).

These adaptations and precautions highlight the complexity of conducting polls in conflict zones and under restrictive regimes. While the data provide valuable insights, it's crucial to consider these limitations when interpreting the results, understanding that they offer a snapshot of public opinion under challenging circumstances rather than a comprehensive view.

Sample Overview

Country	Survey mode	N	Age Range
Germany	CAWI	2,054	18–75
France	CAWI	2,071	18–75
Georgia	CATI	2,009	18+
Italy	CAWI	2,001	18–75
Kazakhstan	CAWI	2,045	18–65
Latvia	CAWI	2,089	18–75
Poland	CAWI	2,021	18–65
Russia	CATI	1,003	18+
Serbia	CAWI	2,090	18–65
Sweden	CAWI	2,072	18–65
Türkiye	CAWI	2,011	18–65
United Kingdom	CAWI	2,087	18–75
Ukraine	CAWI	2,112	18–65
United States	CAWI	2,086	18–75


Additionally, descriptors were collected, including on socio-demographic issues, interest in foreign policy and perceived overall priority of foreign and security policy for the respondents. The survey uses Likert-scaled, binary and open-ended questions. The objective of Likert-scaling is to measure the extent of agreement or disagreement with a question or statement. In most cases, the extent is measured on a four-point scale, encompassing 'strongly agree', 'somewhat agree', 'somewhat disagree' and 'strongly disagree'. However, five-point and ten-point scales were also deemed necessary to ensure subject-appropriate differentiations. The respondents could also decline to agree or disagree with the question or statement. In this case, the answer was coded as 'don't know'. If a respondent declined to answer at all it was coded 'no response'.

Data collection in twelve of the 14 countries was conducted among the resident population via Computer Assisted Web Interviewing (CAWI, Ipsos Online Access Panels, Sampling: Quota Selection). During an online interview, the participant sees the text of the question and the response options on the screen (computer or a mobile device) and clicks on their preferred response. A typical interview in our survey lasted around 20 minutes.

Because of the different levels of telecommunications accessibility for different age groups in particular countries, the age ranges of the targeted population varied. During data collection, quotas were applied for gender, age, region and education. Respondents who took less than half the median amount of time to answer the questionnaire were excluded from the data set to ensure data quality.

In two of the surveyed countries, Georgia and Russia, data were collected using Computer Assisted Telephone Interviewing (CATI). We opted for telephone interviews in these countries because high quality data could not be ensured via online survey. The telephone questionnaire had to be shortened in comparison with the online one because telephone interviews take longer (for instance, interviewers read out not only the questions, but also all response options). As a result, not all questions could be asked in Georgia and Russia (see also the box »Polling during wartime«).

The structure of the resulting raw sample was adjusted to official data by weighting. The iterative »rim weight« (also known as »iterative proportional fitting«) procedure supplied by Quantum Software® was applied. The variables gender, age and region were used to calculate the weighting factors to ensure that the resulting data sets of the respective countries were representative concerning gender, age and region. Weighting targets were derived from Eurostat and the official statistics of the different countries.

	Security Radar 2022	Security Radar 2023	Security Radar 2025
 What?	Representative public opinion poll in 14 countries: Armenia, Austria, France, Germany, Italy, Latvia, Norway, Poland, Russia, Serbia, Türkiye, Ukraine, United Kingdom, and the United States	Representative public opinion poll in four countries: France, Germany, Latvia and Poland	Representative public opinion poll in 14 countries: Germany, France, Georgia, Italy, Kazakhstan, Latvia, Poland, Russia, Serbia, Sweden, Türkiye, United Kingdom, Ukraine and the United States
 Who?	27,500 respondents surveyed in 14 countries Representative samples in each country	8,063 respondents surveyed in four countries Representative samples in each country	27,751 respondents surveyed in 14 countries Representative samples in each country
 When?	September-October 2021	October 2022	September 2024
 How?	CATI (Computer Assisted Telephone Interviewing) in Armenia CAWI (Computer Assisted Web Interviewing) in the 13 other countries carried out by Ipsos on behalf of FES	CAWI (Computer Assisted Web Interviewing) carried out by Ipsos on behalf of FES	CATI (Computer Assisted Telephone Interviewing) in Georgia and Russia CAWI (Computer Assisted Web Interviewing) in the 12 other countries carried out by Ipsos on behalf of FES



Perceptions of European security

People are worried

Carried away by geopolitics

War against Ukraine

Wrong place, wrong time –
the EU in geopolitics?

From threat to trust: strengthening
international organisations

Attitudes to climate change

People are worried

Societies are clearly worried. Even though most people feel safe in their immediate surroundings (except in war-ridden Ukraine), they are concerned about their personal future and economic situation. People are most afraid of wars and conflicts and can imagine a war breaking out between Russia and the West. Although most do not expect a new world war, they worry about possible escalation in the course of Russia's war against Ukraine.

Pessimism drives the day

Large majorities in all countries are **concerned about their personal future**. Ukrainians are most worried (92%), a sad but unsurprising result in a country fighting a war against an aggressor. People are a bit less concerned only in some western European countries, namely the United Kingdom, Germany, France and Italy (below 70%). Most people feel safe in their immediate surroundings, again with the exception of Ukrainians. Substantial shares of respondents worry that their **economic situation will deteriorate in the future**, including more than half of respondents in Türkiye and Ukraine, but also in prosperous Germany and France. Georgian and Kazakh respondents are least pessimistic, while opinion in Russia is evenly split. This mood goes along with the widespread **worry about economic crises and inflation**, which feature among the top three concerns across the poll.

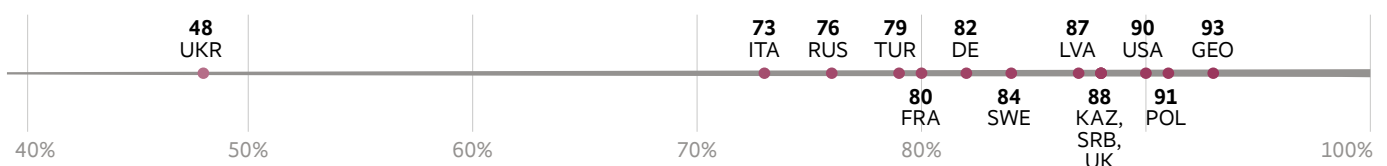
Russia, Ukraine, Kazakhstan and Georgia are the most optimistic about their countries' developments.

Regarding the future situation with regard to **peace and security in their own country**, clear optimists are found only in countries outside the EU or NATO: Russia, Ukraine, Kazakhstan and Georgia. In the USA, optimists outweigh pessimists but are not a majority. All others have a rather gloomy outlook. French and Germans (and to a lesser extent Italians) are extremely pessimistic, and pessimism has increased notably since 2021. Respondents in all other countries are undecided, with a slight tendency towards pessimism. A similar picture, but with a stronger degree of pessimism overall, pertains to the outlook for peace and security in the world. Germans and French stand out, with close to 70% thinking the situation will deteriorate.

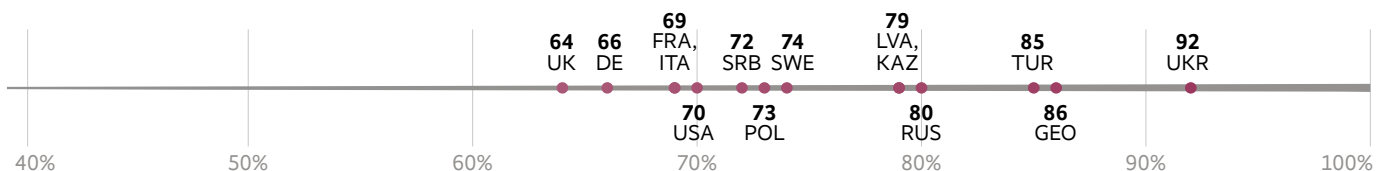
Thinking about your personal situation, to what extent do you agree or disagree with the following statements?

Countries ranked in ascending order. Combined responses 'strongly agree' and 'somewhat agree'. All figures in %

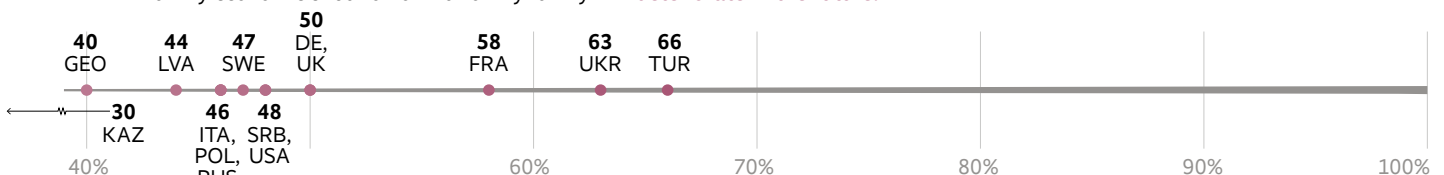
'Personally, I feel safe in my immediate surroundings (town, neighbourhood, etc).'



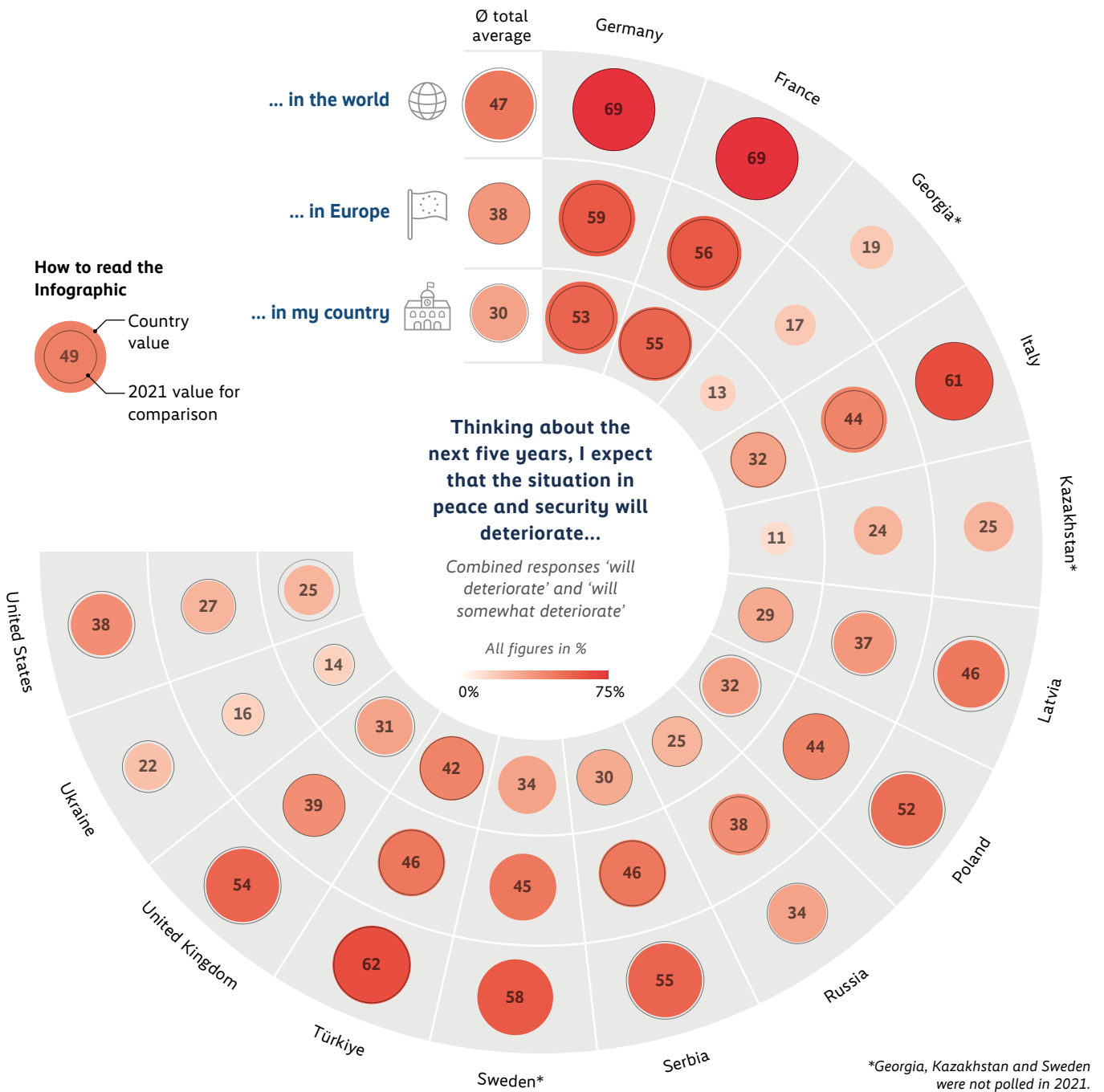
'If I think about the various developments in my country and the world, I am concerned about my personal future.'



'I think that my economic situation or that of my family will deteriorate in the future.'



Agreement

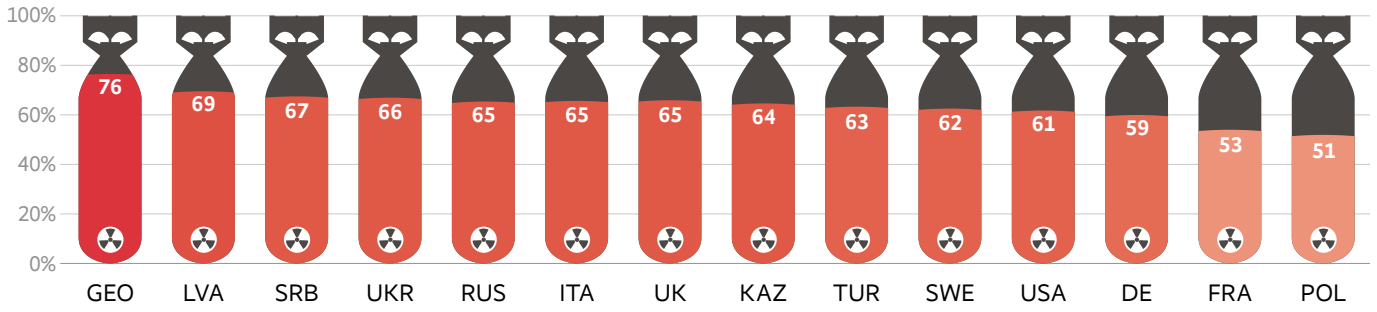


A notable observation concerns the two warring parties: both in **Russia and Ukraine** optimism about peace and security in their own country increased markedly between 2021 and 2024, despite the war. In Ukraine, this may reflect public resistance and strong morale in the face of the aggressor, coupled with defiant official rhetoric; in Russia, this may rather be the fact that most Russians do not feel directly affected by the war, or have been lulled into a sense of security by state propaganda.

As **priorities for foreign policy**, people name terrorism and extremism, followed by human rights violations, geopolitical tensions and conflicts, and climate change. Terrorism as a global problem features first in most countries, apart from Georgia and Italy. Human rights violations are a bigger priority for Sweden than for other countries. Geopolitical tensions are of particular concern for Ukrainians and Latvians. Climate change is named as a priority in Italy ahead of all other states. International migration, though not a major concern on average, is among the top priorities in Germany and Türkiye.

I am worried about a nuclear escalation in the course of Russia's war against Ukraine.

Countries ranked in descending order. All figures in %



Combined responses 'strongly agree' and 'somewhat agree'

To what extent are you personally concerned about the following current events?

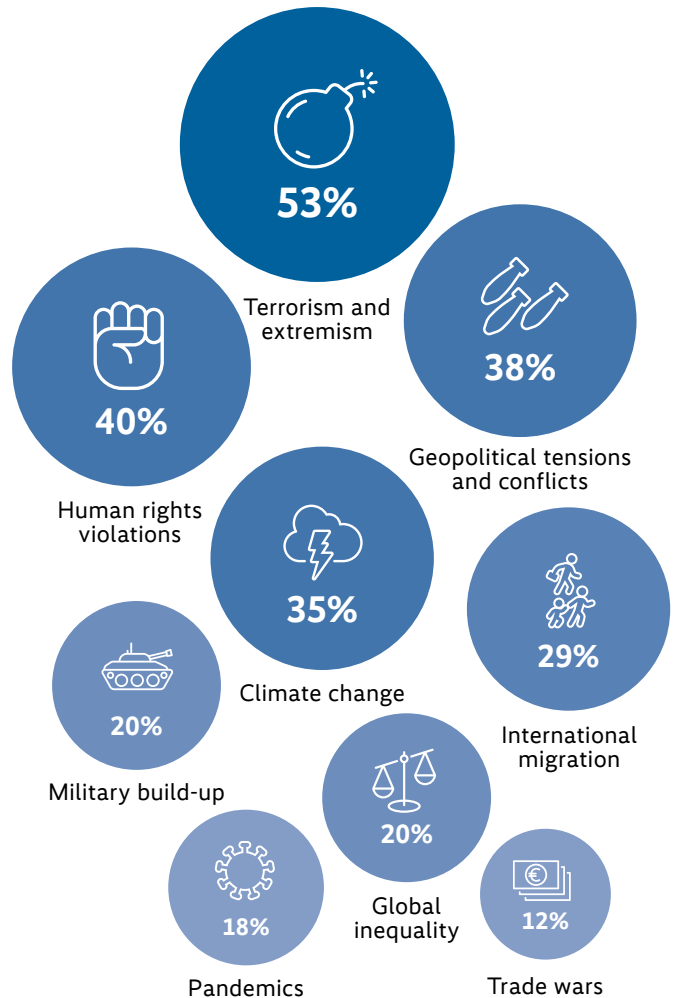
Top 3 responses for each country. Combined responses 'strongly agree' and 'somewhat agree'. All figures in %

	Most concerning	2 nd most concerning	3 rd most concerning
Germany			
France			
Georgia			
Italy			
Kazakhstan			
Latvia			
Poland			
Serbia			
Sweden			
Türkiye			
United Kingdom			
Ukraine			
United States			

- Cyber attacks
- Economic crises
- Inflation and rising cost of living
- International terrorism
- Wars and conflicts

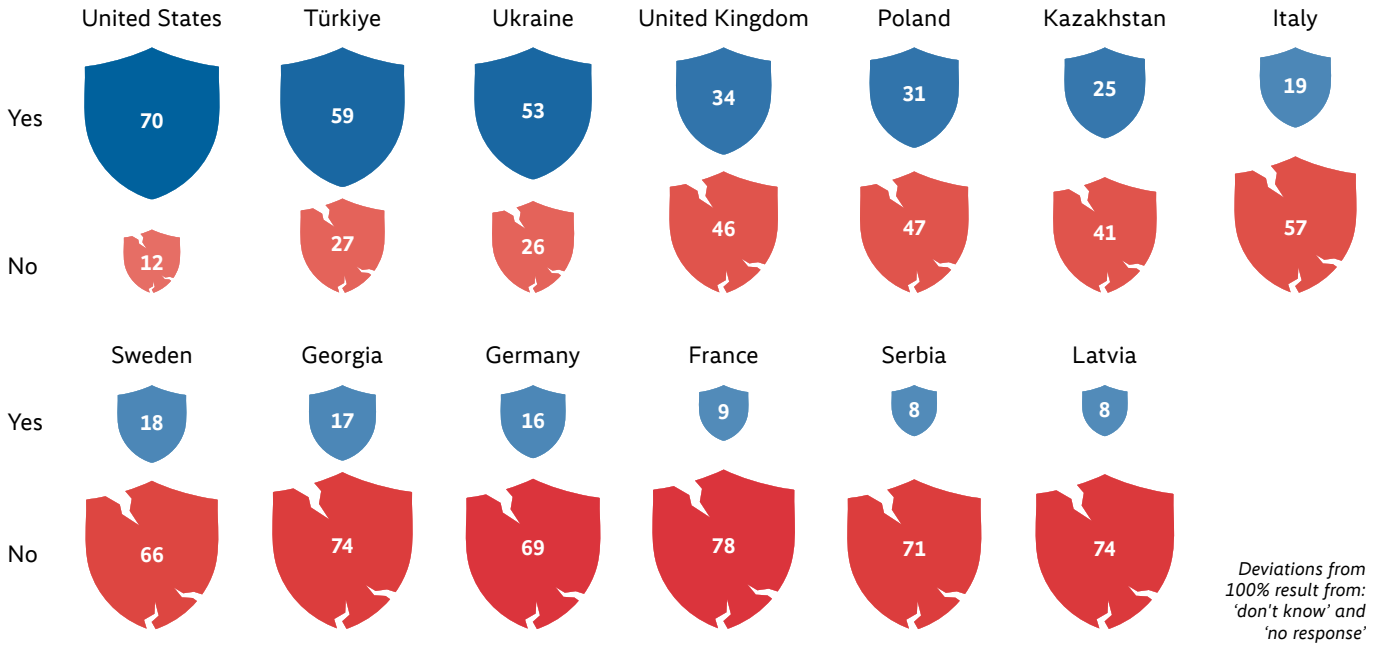
Which of the following global foreign and security policy problems do you think should currently be given top priority?

Respondents were asked to select and rank three items out of nine. Average across all polled countries (bar Russia).



If Russia declared war tomorrow, could my country defend itself?

Countries ranked in descending order. All figures in %



Majorities in most countries do not believe **their country could defend itself if Russia declared war.**

Latvia and Georgia border Russia and lack strategic depth, which makes defence objectively challenging. By contrast, respondents' lack of confidence in their country's defence capabilities in Germany and especially France is noteworthy. Ukraine, Türkiye and the US are the only countries that consider themselves strong enough to defend themselves

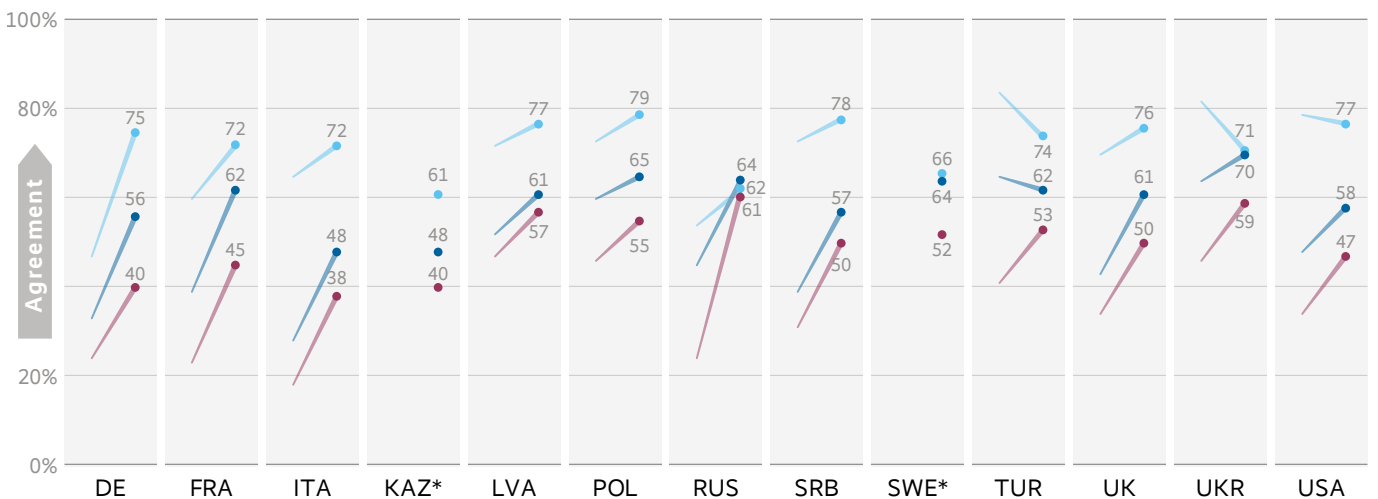
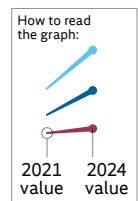
against Russia. The 'don't know' ratio in this question does not stand out compared with other questions. The exception of 28% in Kazakhstan indicates that the scenario of a Russian attack is perhaps disconcerting for respondents.

Fear of **nuclear escalation** in the course of Russia's war against Ukraine is a universal concern in all polled countries. The level of worry ranges from 51% in Poland to over 60% in the US, Ukraine and Russia and 76% in Georgia.

To what extent do you agree or disagree with the following statements?

Combined responses 'strongly agree' and 'somewhat agree'. All figures in %

- I fear that wars and other conflicts will **affect my country** in the future.
- In view of increasing tensions between Russia and the West, I think **new wars in Europe are likely.**
- I consider a **direct, military confrontation** between Russia and the West to be likely.



*Not polled in 2021.

Carried away by geopolitics

The world seems to have become more geopolitical, dangerous and polarised, according to our survey responses. People are more inclined to approve cooperation only with like-minded partners and see the world increasingly in black and white. Stronger emphasis is being put on the military than three years ago.

New polarisation

Many people perceive the **emergence of a new Cold War** between China and the US, with all other states forced to choose sides. This sentiment is stronger outside NATO than inside the alliance. The figure is close to 50% in almost all NATO states. In the group of EU candidate countries Türkiye, Serbia and Ukraine people are much more likely to anticipate a new Cold War-like division (60% and more). Only in Georgia do the majority disagree.

Most people perceive a decline of **American hegemony** in international affairs, even though only in Russia, Türkiye, Serbia and Kazakhstan is the figure over 50%.

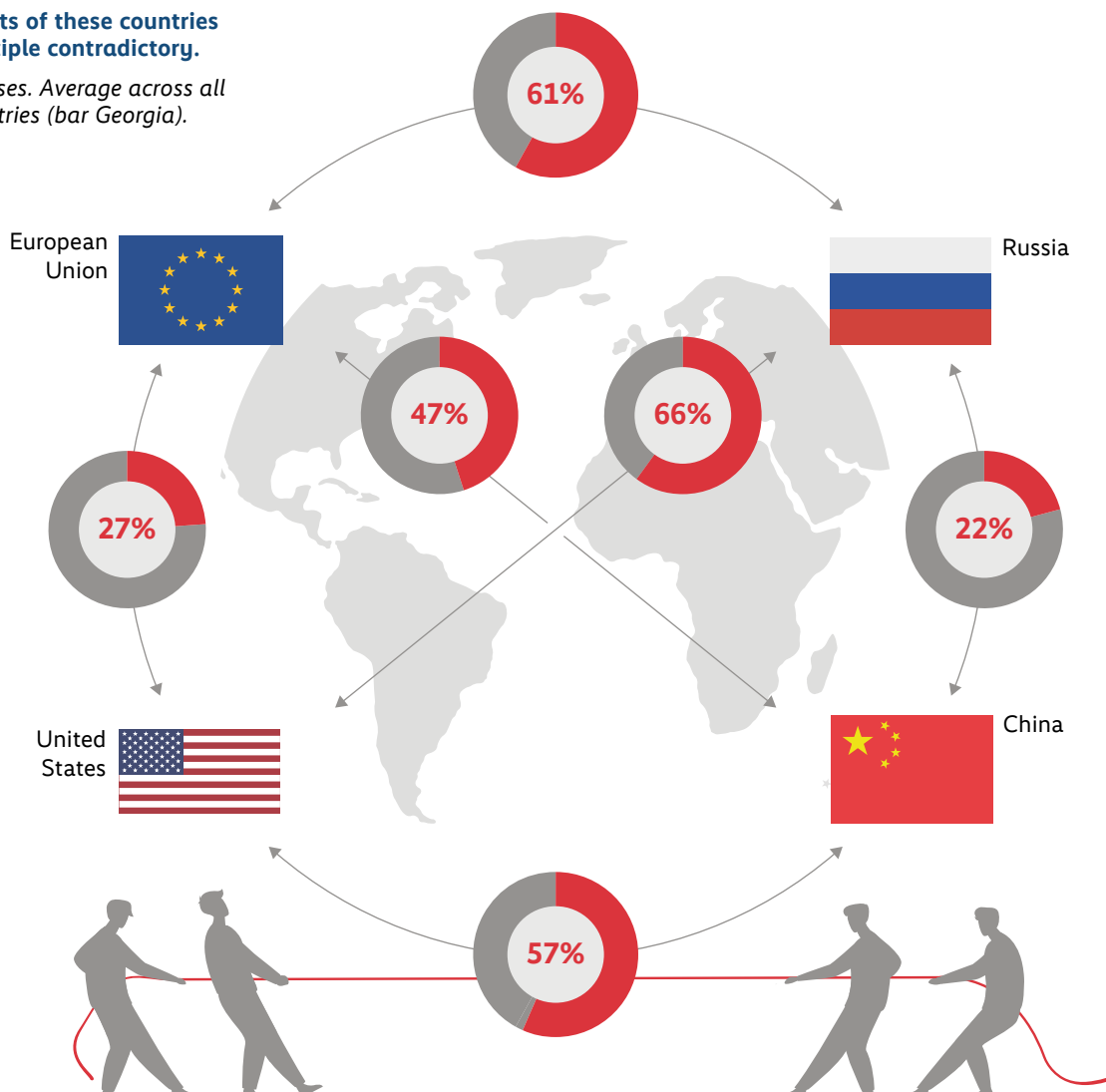
Even American allies tend to agree that the era of American supremacy is over.

Even in closely allied states such as the UK and Germany (or in Sweden, which recently joined NATO) more people agree than disagree that the era of American supremacy is over. Opinion in the US itself is almost evenly divided. Only Ukrainians, Georgians and Poles are not prepared to say that the age of American hegemony is over.

The perception of new divisions is underscored by perceived **differences in interests** between major powers and blocks: the US and the EU on one side and China and Russia on the other.

The interests of these countries are in principle contradictory.

'Yes' responses. Average across all polled countries (bar Georgia).



Little contradiction of interest is perceived within the blocks, but a strong contradiction is felt between them. There are some notable outliers, though.

Almost twice as many **Turkish** and **Russian** respondents perceive a contradiction of interests between the EU and the US (over 40%) than respondents in the six EU countries and the US (24% on average). Turks are also much more inclined to believe that Russian and Chinese interests are contradictory (37% compared with 22% on average).

Ukrainians are convinced much more than others that Russian interests contradict those of the US (76%) and the EU (73%). Only perceptions within Russia itself are similar. Noteworthy, 57% of **Americans** see less contradiction between the US and Russia compared with all other respondents, including the Russians. Americans are also least convinced that Russian and European interests contradict one another (49%, compared with 61% on average,

68% among Russians). This points to widespread pragmatism in America, a recurrent pattern in the poll. Russian respondents themselves see the biggest clash of interests with the US (84%) and the smallest with China (14%).

In all countries except Russian allies Kazakhstan and Serbia, overwhelming majorities believe that Russia is a threat to European security. Across all countries without exception, the feeling of threat emanating from Russia has intensified compared with 2021, in some cases dramatically. Many respondents across countries also name Russia as a threat to their country. Even in Türkiye, with its pragmatic policy towards Russia despite the invasion of Ukraine, 56% think Russia is a threat to European security (2021: 49%). Connected with this, most respondents disagree with the statement that **Russia is emerging as a new leader of the countries outside the West**. Only in Russia, Serbia and Kazakhstan, as well as in Türkiye, do people agree.

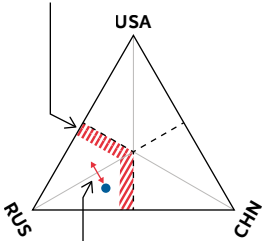
Do you believe that China, the USA or Russia represent a threat to peace and security in Europe?

How to read the infographic

The closer the countries are located in the corner, the higher the relative threat perception

Primary threat

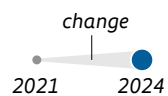
The sector in which the country dot is located shows the country most perceived as a threat.



Secondary threat

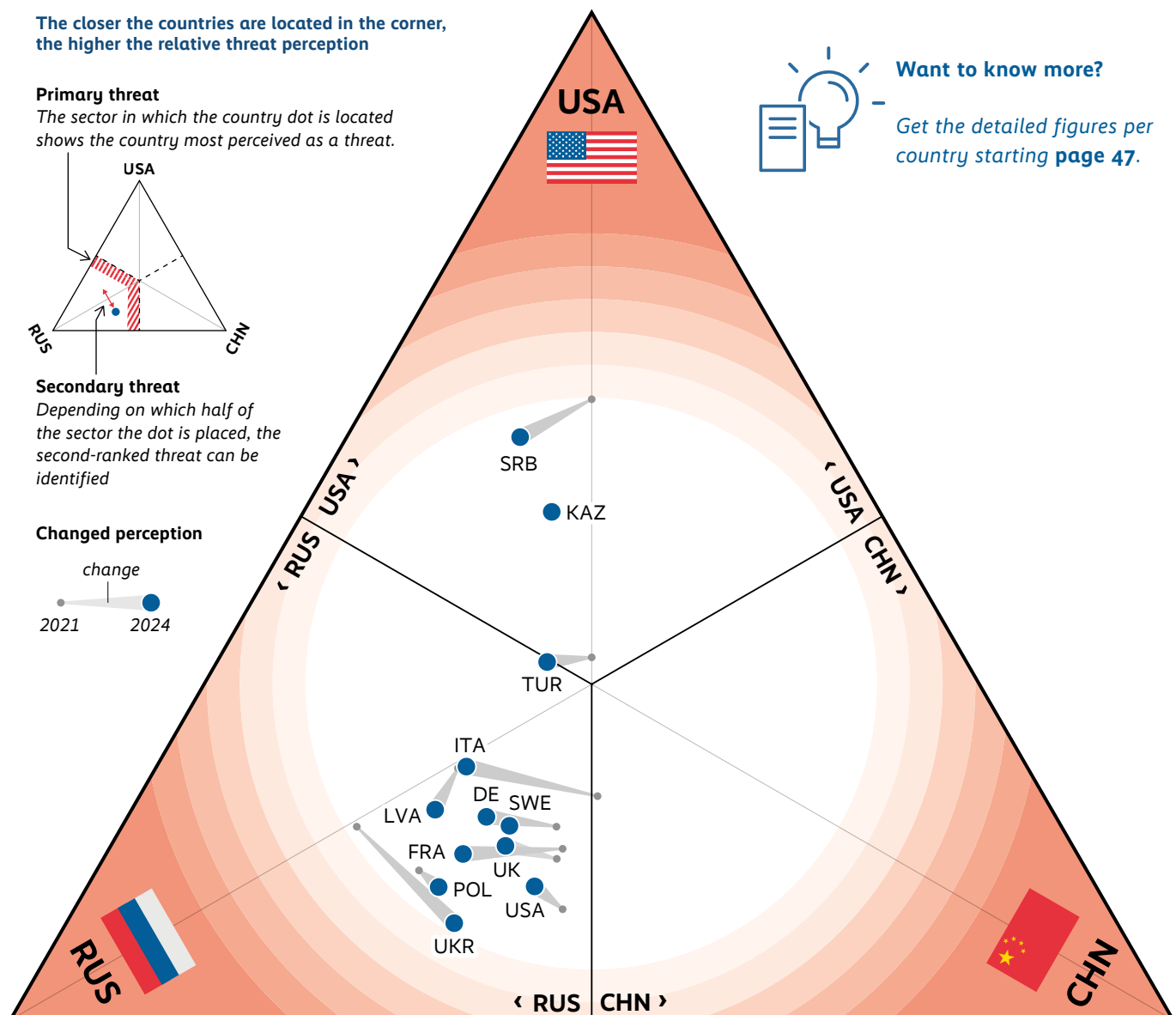
Depending on which half of the sector the dot is placed, the second-ranked threat can be identified

Changed perception



Want to know more?

Get the detailed figures per country starting page 47.



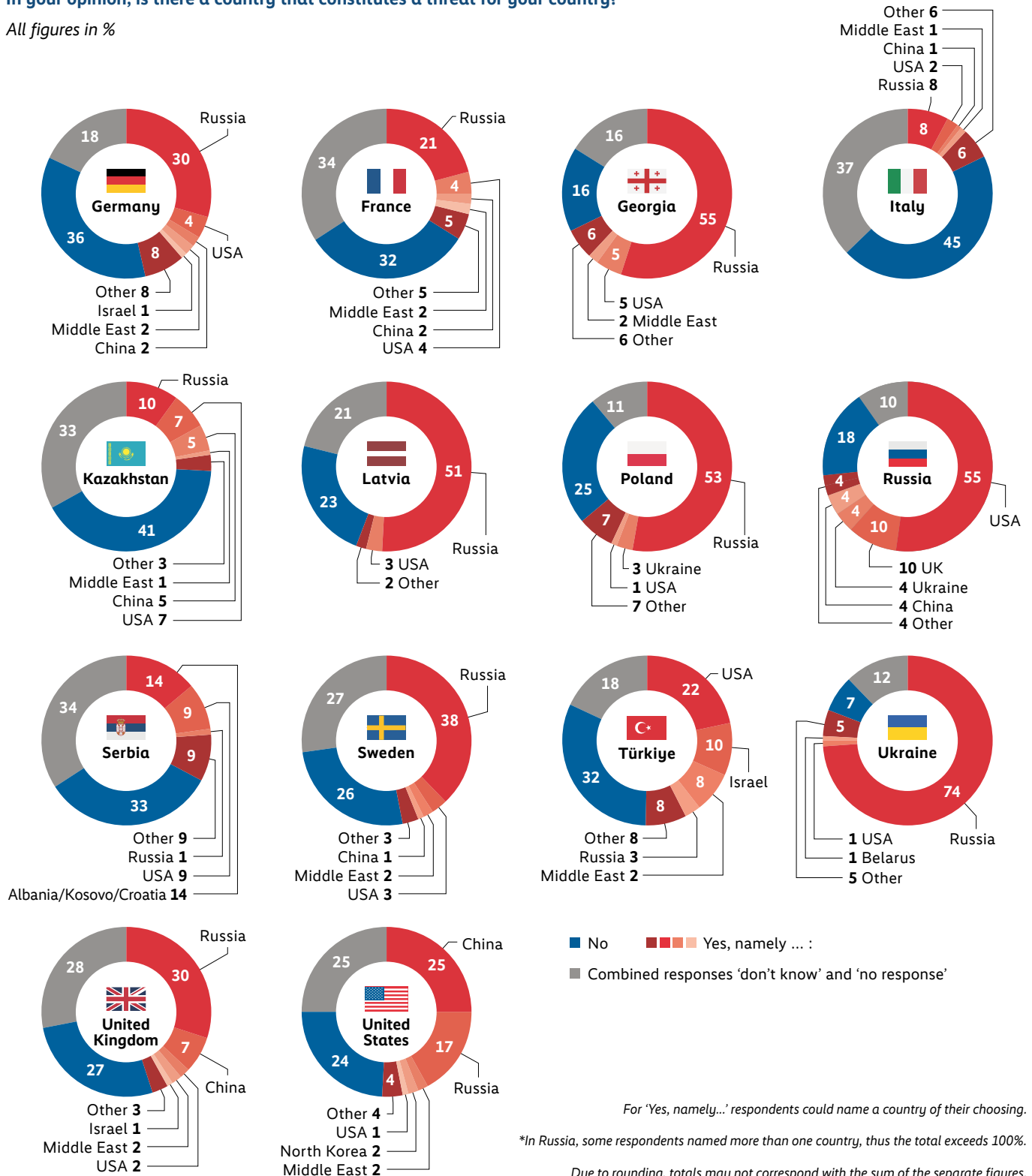
By contrast, respondents in Poland, Ukraine and Latvia strongly disagree. But the figures are close to 40% in western European countries Germany, France, Italy and Sweden, underlining that there is a perception of new divisions in the world.

The perception of Russia as a threat to peace and security in Europe is widespread (68%). This is felt most intensely in Ukraine (89%), followed by Sweden (84%).

In distant second place, China is viewed as a threat by an average of 43% of respondents, with notably high concern in Sweden and the US (both at 59%). The US ranks third, seen as a threat by 34% on average. This perception is lowest in Ukraine (15%) and highest in Serbia (70%). While perceptions of a US threat have remained largely stable since 2021, they have risen significantly in Italy (from 21% to 35%) and Germany (from 24% to 30%).

In your opinion, is there a country that constitutes a threat for your country?

All figures in %



To what extent do you agree with the following statements about the state of the world?

Combined responses 'strongly agree' and 'somewhat agree'. All figures in %



The era of American (Western) supremacy is over.



A new Cold War is emerging between China and the US, and all other states will have to choose sides.



An era of wars and conflicts is emerging.



We are entering an era of »my country first« and everyone is looking out for themselves.



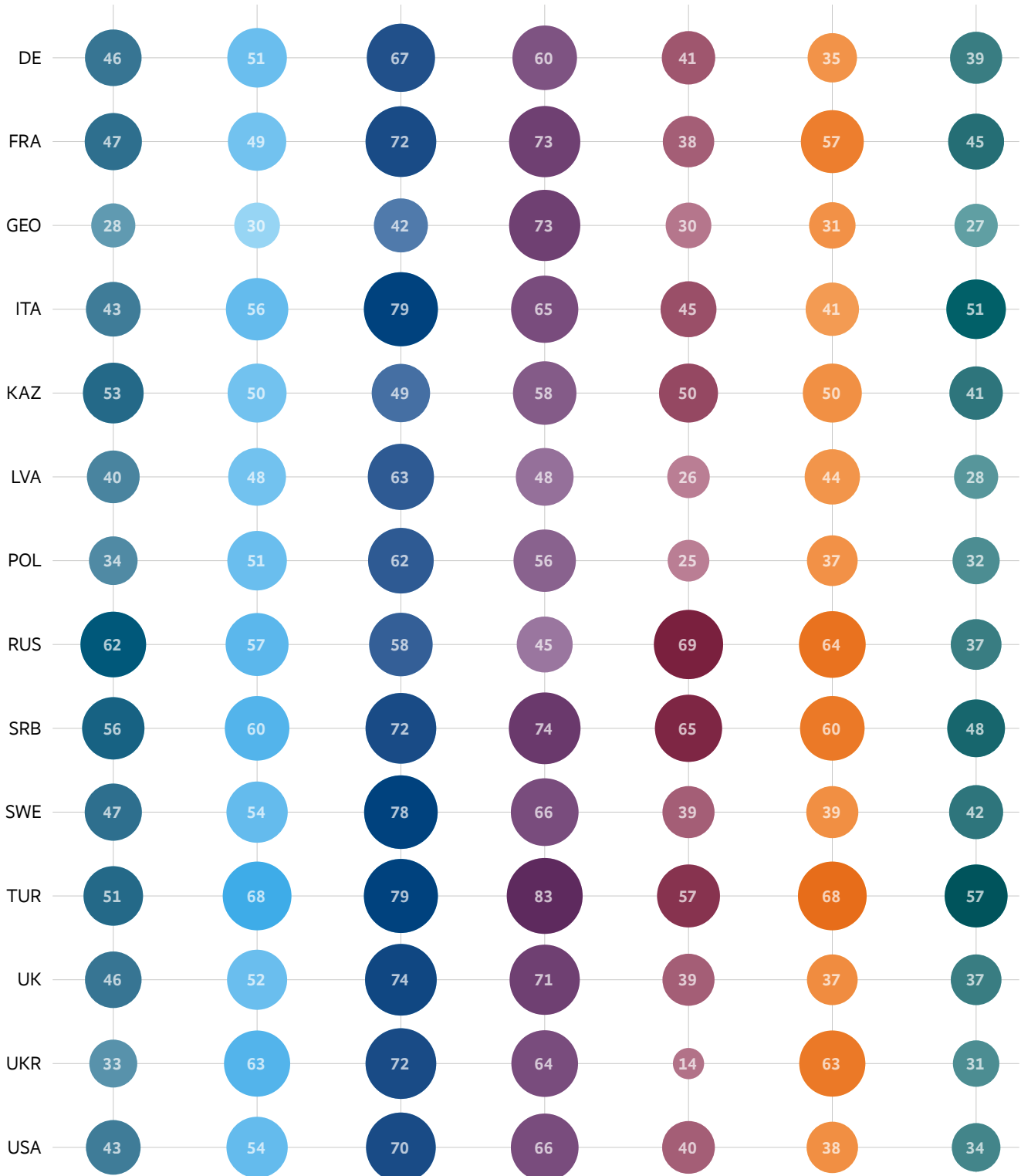
Russia is emerging as a new leader of the countries outside the West.



Laws and rules in international relations are no longer relevant.

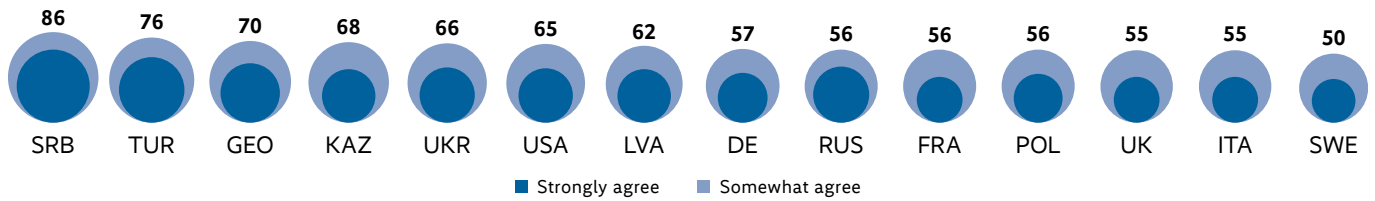


Middle powers (such as Türkiye, Brazil and South Africa) are emerging as new centres of power.



My country should concentrate on its own well-being and try to avoid international involvements.

Countries ranked in descending order. All figures in %



In some countries, like Germany or Kazakhstan, no clear majority identify a single nation as a direct threat to their own. This is different in Russia, where 55% name the US as their main threat, as well as in Ukraine (74%), Georgia (55%) or Poland (53%), where Russia figures as the main threat.

Ukraine. Poland, at 62%, is the staunchest supporter of promoting values abroad. The undecided group includes Sweden and Kazakhstan (a five-percentage point difference or less between 'at home' and 'abroad').

Trend towards isolationism

Isolationism is another trend in a world marked by polarisation and rivalries. Majorities across all countries agree that their country should **concentrate on its own well-being and try to avoid international involvements**. While this trend might be understandable in non-aligned countries such as Ukraine, Georgia or Serbia, it is disquieting in NATO members Türkiye (76%), Germany, France, the UK or Poland (all around 56%). Most notably, respondents in the US overwhelmingly want to reduce international involvements (65%), underlining the potential upcoming changes in US foreign policy.

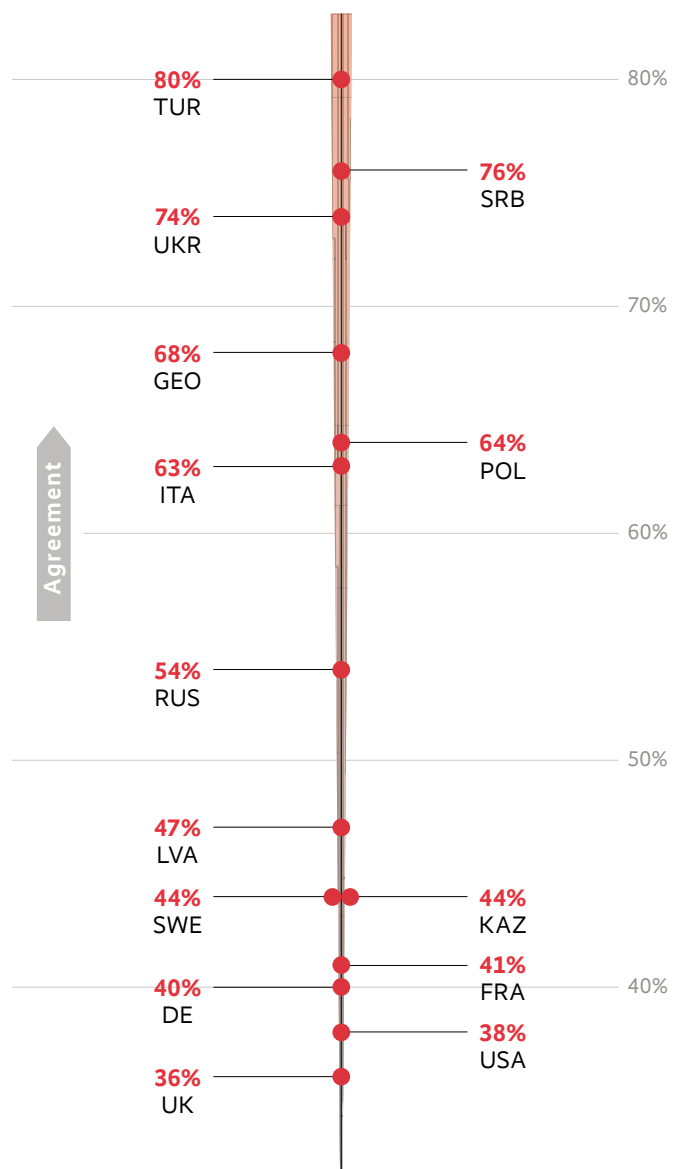
The tendency towards isolationism is coupled with a strong perception that international relations are **entering a phase of »my country first«**. Again, this is strongly felt not only in countries outside the EU, such as Türkiye (83%), Georgia and Serbia (around 73%), but also in France and the UK (over 70%). Only in Russia are people undecided. In the US, where the term was (re-)introduced by President Trump during his first term, 66% think we are entering an era of »my country first«.

These trends go along with widespread **status dissatisfaction**. Only the US and the UK (and to a lesser extent Germany and France) are satisfied with the status of their countries in the world compared with other countries. The French are undecided, while all others think that their countries do not enjoy the status they deserve. Absolute majorities express status dissatisfaction also in Italy and Poland, while in Poland the share of people has even grown over time (from 57% in 2021 to 64% in 2024). Among the most dissatisfied are Türkiye, Ukraine and Serbia (70–80%).

When asked **whether foreign policy should promote values abroad**, countries seem to fall into three uneven groups. Germans most clearly opt for promoting values at home (65%) instead of abroad (25%). The US, the UK and France follow a similar pattern, although the focus on values at home is less pronounced than in Germany. The second group, who lean towards promoting values abroad, is diverse, comprising Italy, Poland, Latvia, Serbia, Türkiye and


My country does not have the status in the world it deserves in comparison with other countries.


Countries ranked in descending order. Combined responses 'strongly agree' and 'somewhat agree'.

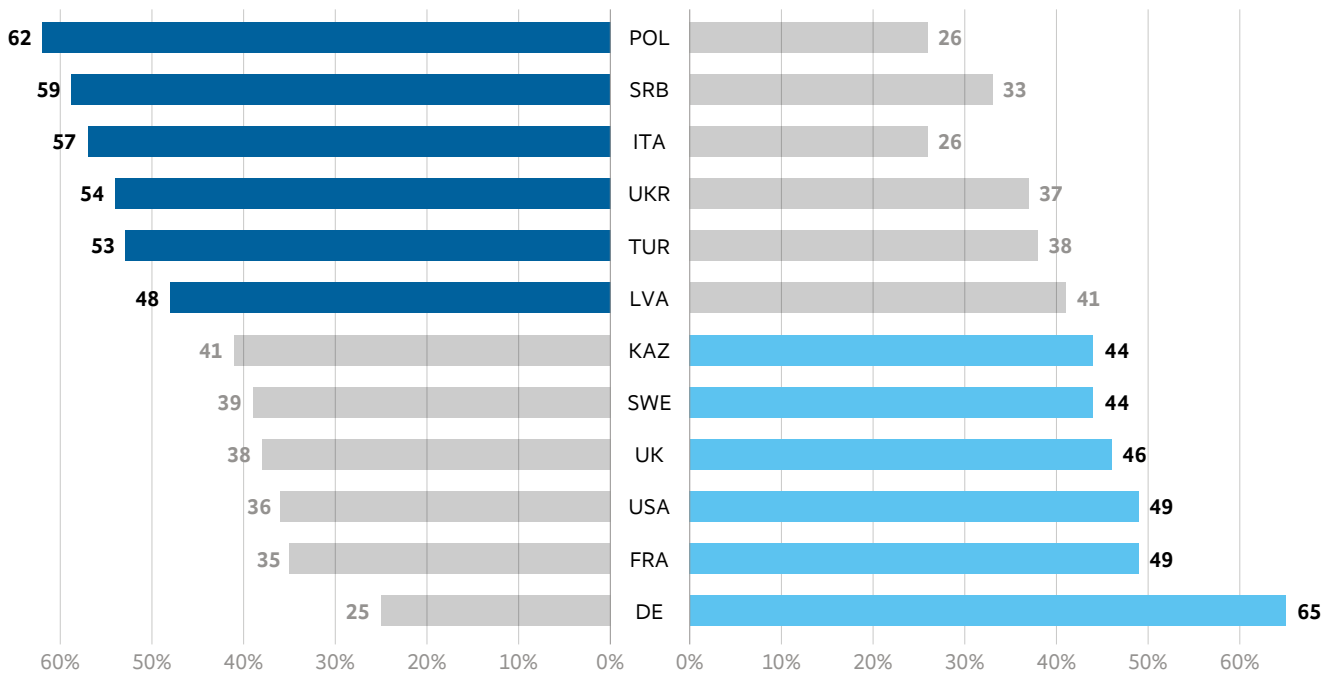


Which of the following two statements do you agree with more?

All figures in %

'The foreign policy of my country should be committed to **promoting our own values abroad.**' 


 'My country should be **committed to our values at home** but not try to promote them abroad.'




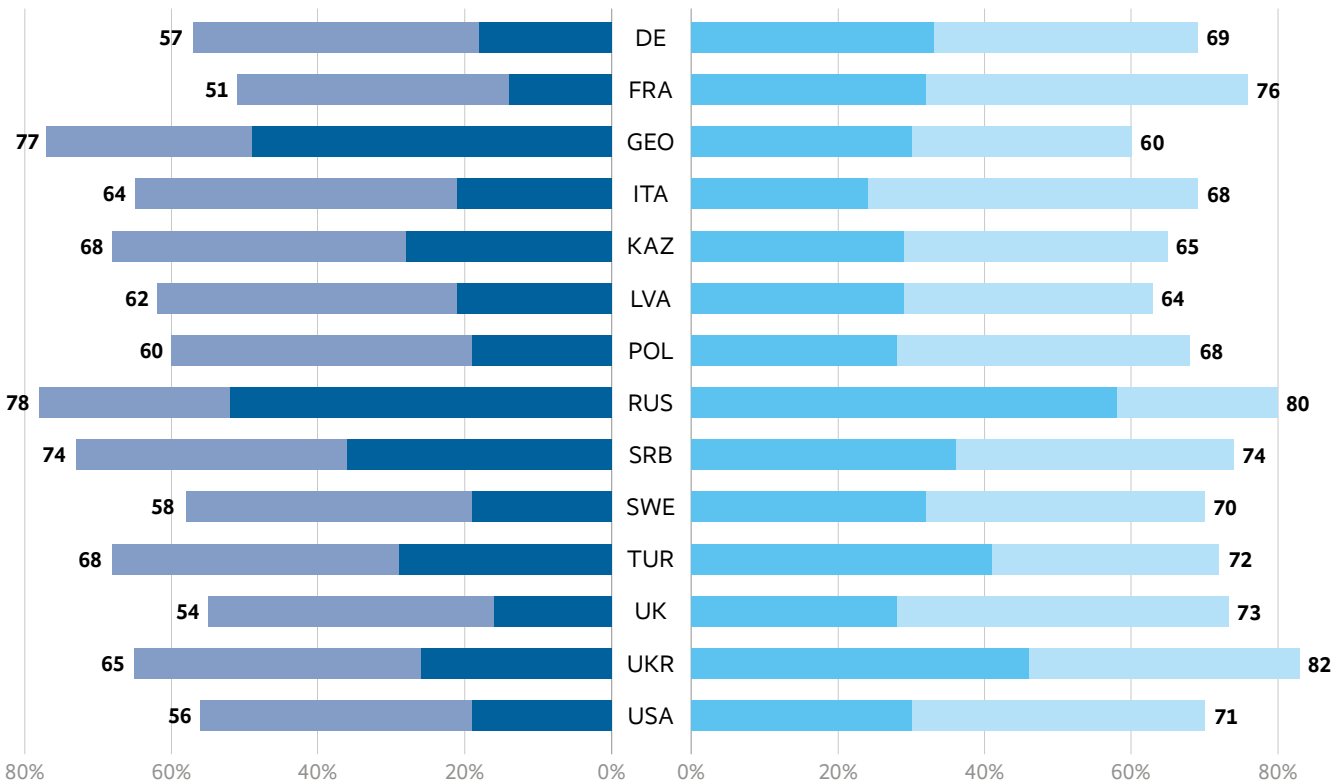
Deviations from 100% result from: 'don't know' and 'no response'

To what extent do you agree with the following statements?

All figures in %

'My country should **cooperate with any country**, even those that do not share our values, if it promotes peace and security in the world.' 

 'My country should **reduce dependence** on countries that **do not share our values.**'



■ Strongly agree
■ Somewhat agree

Cooperation rather with the like-minded

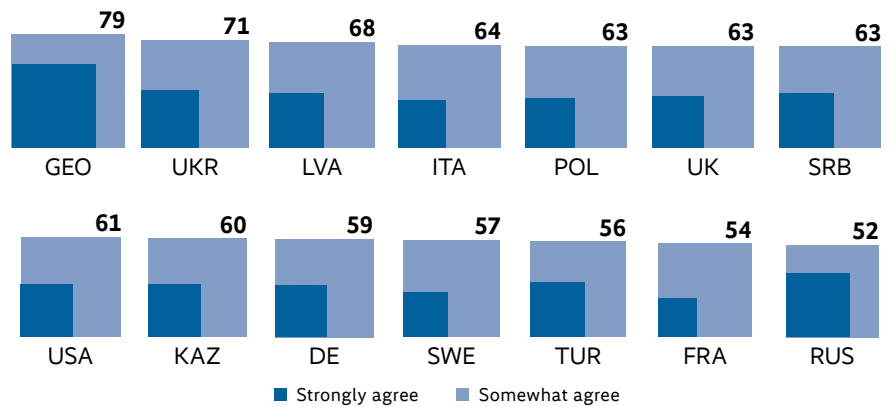
In a world characterised by polarisation, »my country first« policies and isolationism there is a trend towards cooperation with like-minded partners. Most respondents across the sample prefer to **reduce dependence on countries that do not share the same values** (71% on average). This sentiment is strongest in Ukraine, a country at war and in need of reliable allies (82%). The value is very similar in Russia (80%).

The trend is reinforced by a relatively low appreciation of interdependence, even in countries strongly dependent on exports and trade. Agreement with the statement the **»prosperity of my country is in many respects linked to well-being and positive developments in other countries«** is fairly low in Germany (59%), France (54%) and Russia (52%). The trend has been decreasing (or stable) since 2021 in all countries except the US, the UK and Ukraine, where appreciation of interdependence has increased markedly. In Ukraine it is highest, at 71%.

Most respondents also wish to **reduce dependence on Russia and China**, even if it has negative economic implications. The wish to decouple from Russia is generally stronger than from China, but opinions differ across countries. People in Sweden, Poland (around 73% each) and especially Ukraine (85%) are the staunchest proponents of reducing dependence on Russia, regardless of the cost. By contrast, most Kazakh and Serbian respondents disagree. This attitude is mirrored in the issue of **more cooperation with Russia**: people in all NATO members (bar Türkiye) overwhelmingly reject it; Ukraine leads the poll with 85%

The prosperity of my country is in many respects linked to the well-being and positive development of other countries.

Countries ranked in descending order. All figures in %



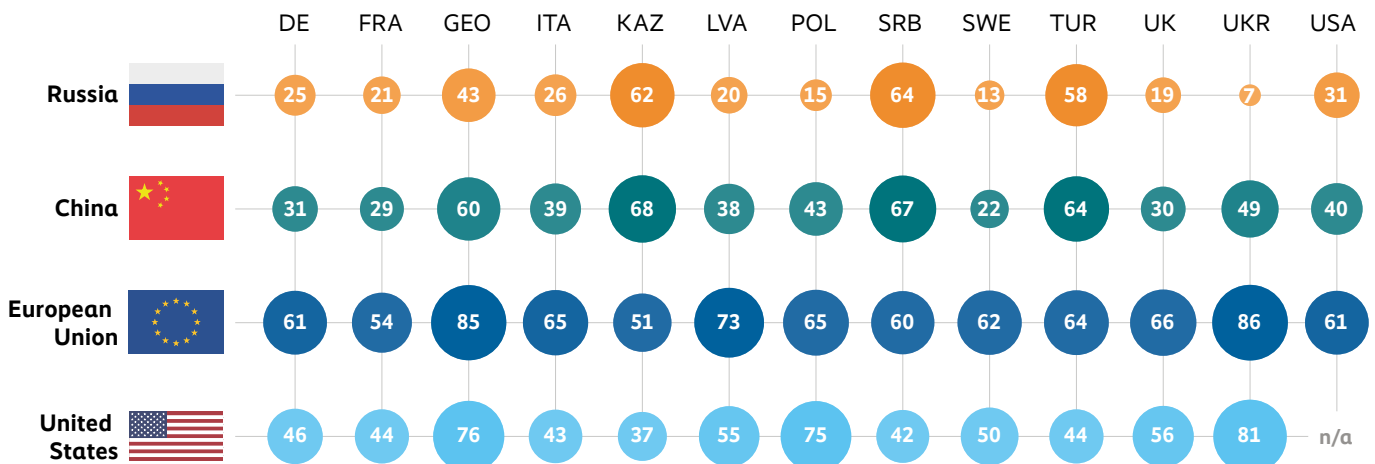
rejecting it. By contrast, majorities in Serbia (64%), Kazakhstan (62%) and Türkiye (58%) favour enhancing cooperation with Russia. A notable case is Georgia, where despite strong negative sentiments towards Russia, 43% nevertheless favour cooperation.

Overall, »Western« countries (UK, US, Germany, France, Sweden, Italy, but also Türkiye) tend to be wary of dependence on China, with US respondents being most critical (68%), again underscoring that Trump's stance on China resonates with American citizens. The proportion of Germans wishing to reduce dependence on China notably decreased from 64% in 2022 to 57% in 2024. »Eastern« countries are less sceptical of economic ties with China.

Ukrainians believe their country's prosperity is most tied to the well-being and positive developments in other countries.

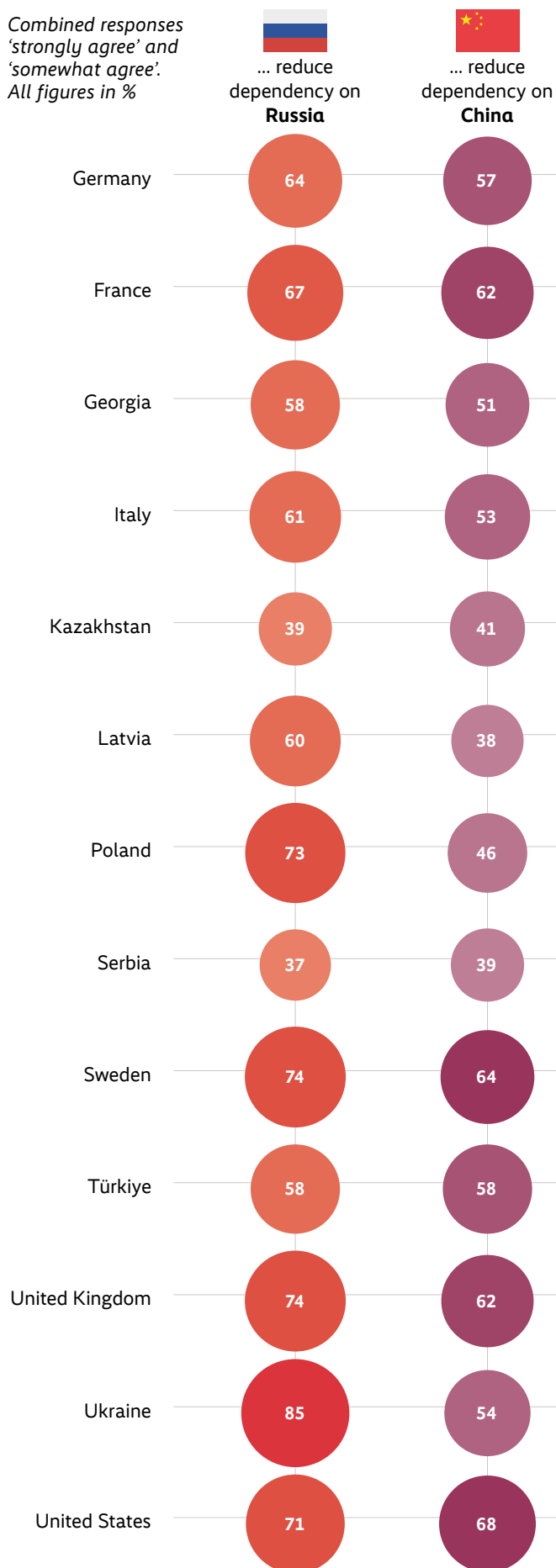
My country should collaborate more with...

Combined responses 'strongly agree' and 'somewhat agree'. All figures in %



My country should reduce its dependency on ... even if this has a negative impact on the living standards of the population of my country.

Combined responses 'strongly agree' and 'somewhat agree'. All figures in %



In Poland and Georgia, there is no absolute majority for decoupling from China. In Kazakhstan, opinion is almost evenly split. In Latvia and Serbia, more people oppose decoupling than endorse it. The same trend is reflected in the question of whether countries should **cooperate more with China**. Germany, France, Sweden and the UK oppose more cooperation, while Ukraine, Georgia, Kazakhstan, Serbia (and, interestingly, again Türkiye) endorse more cooperation with China. Opinion in the US is split, indicating a fairly pragmatic stance on the part of the population.

Questions about **more cooperation with the EU** and **more cooperation with the US** reveal a preference for the EU across the sample (with the notable exception of Poland). Respondents show a stronger wish to increase collaboration with the EU (64% across all polled countries) than with the US (52% across the sample). Among those least enthusiastic about increasing cooperation with the US are Kazakhstan (37%) and Serbia (42%), but also fellow NATO members Türkiye, Italy, France and Germany (close to 45% each). Ukrainian reliance on allies is again conspicuous, with more than 80% desiring more cooperation with both Europe and the US. Even in Ukraine, the EU scores better than the US.

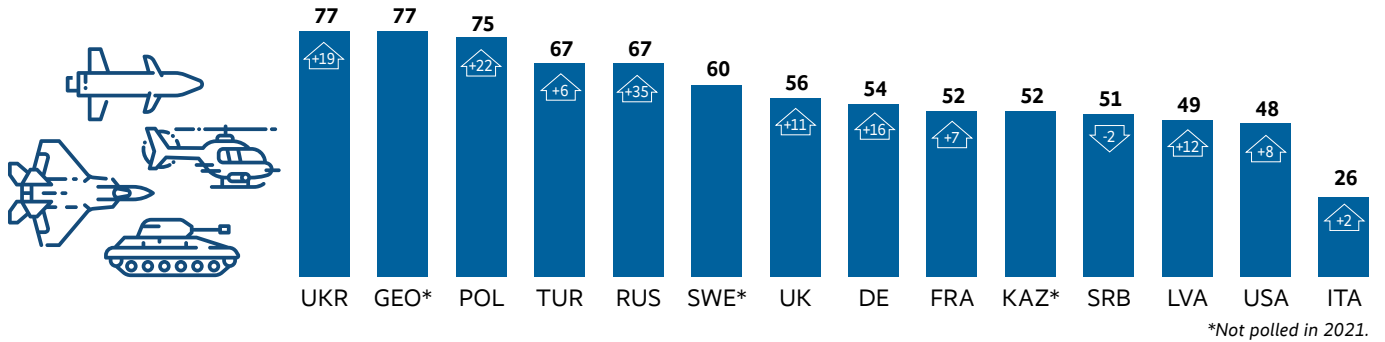
People across our 14-country sample show a remarkable pragmatism, framed as cooperation with non-likeminded states. Absolute majorities, on average 64%, endorse the statement 'My country should cooperate with any country, even those that do not share our values, if it promotes peace and security in the world'. Just like in 2021, **pragmatism** seems to be stronger in »the East« than in »the West«. This applies even to the EU, where »new« member states (Latvia, Poland) gravitate towards more pragmatism than founding members. The staunchest supporters of this are found in Russia (78%), Georgia (77%), Serbia (74%), Kazakhstan and Türkiye (68% each). Less supportive are people in France (51%) and in the US and the UK (around 55% each).

Stronger emphasis on the military

Times of international turbulence, conflict and uncertainty are good times for the military. The year 2024 broke another record with regard to military spending world-wide. Public sentiment reflects the increased salience of the military. Majorities in our polled countries support **increases in military spending**. A notable and very stark exception is Italy, the only country in which people resolutely oppose increasing military spending (62%), a figure that has remained unchanged since 2021. Italy generally sticks out in the poll as a country that did not undergo the same changes as its European neighbours in the wake of 24 February 2022. Although threat perceptions regarding Russia and fear of war have markedly increased in Italy since the beginning of the invasion, Italians do not seem to have drawn the same conclusions in terms of military and defence enhancement. A culture of restraint, once a German trademark, now seems prevalent in Italy.

My country should increase its military spending.

Combined responses 'strongly agree' and 'somewhat agree'. Figures in arrows indicate change compared with 2021. All figures in %



The only exception is Italy, where **62%** oppose increased military spending.

Germany presents itself as a country undergoing a *Zeitenwende*. Public endorsement of increased military spending outweighed decades-old rejection only after Russia invaded Ukraine full scale. But the issue remains divisive, as both agreement and disagreement have increased compared with 2021 (indicating the increased salience of the issue), with 54% endorsing and 36% opposing higher military spending. The Latvian public is similarly split, although supporters of higher military spending outweigh its critics.

In the US, the group favouring more defence spending is 10 percentage points ahead of its opponents, albeit short of an absolute majority (48%). This may reflect either the sense that the US already spends enough or the widespread wish to reduce international entanglements.

The majority of respondents continue to prioritise economic and social affairs over defence spending. In Ukraine, a country embroiled in war, 61% would prefer defence compared with 20% who favour social spending. In Russia, public opinion is nearly evenly divided, with 45% favouring social spending and 44% prioritising defence. The Polish case stands out.

If you had to choose, where you would rather spend the limited government budget?

All figures in %

'My country should prioritise **spending on economic and social affairs** over defence.'

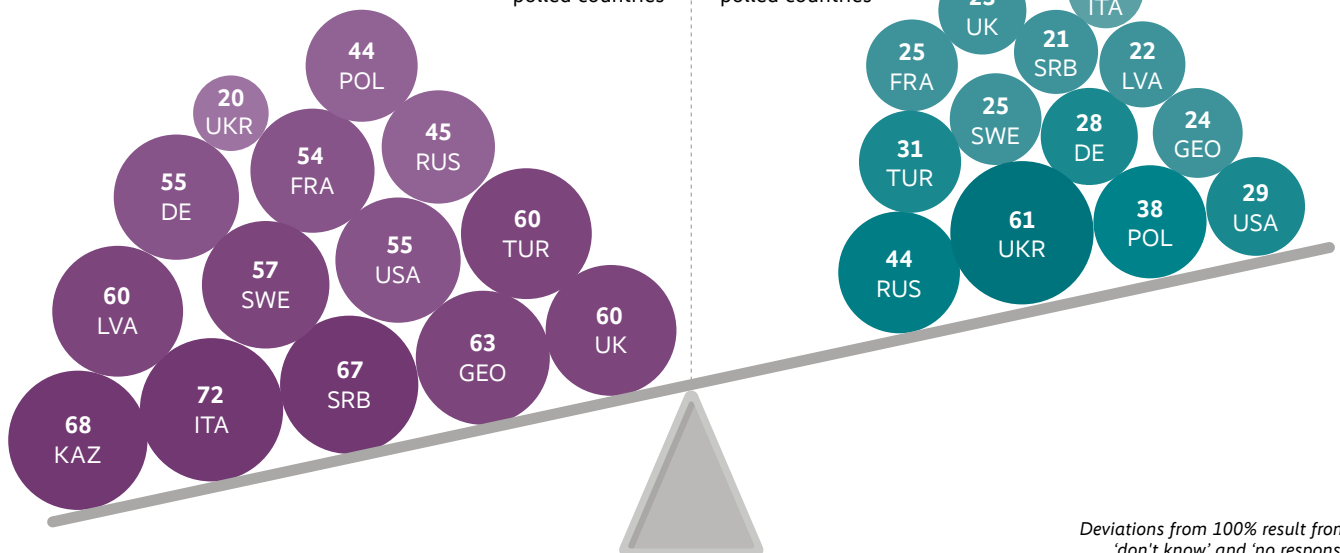


56%
Ø across all
polled countries



'My country should prioritise **spending on defence** over economic and social affairs.'

29%
Ø across all
polled countries



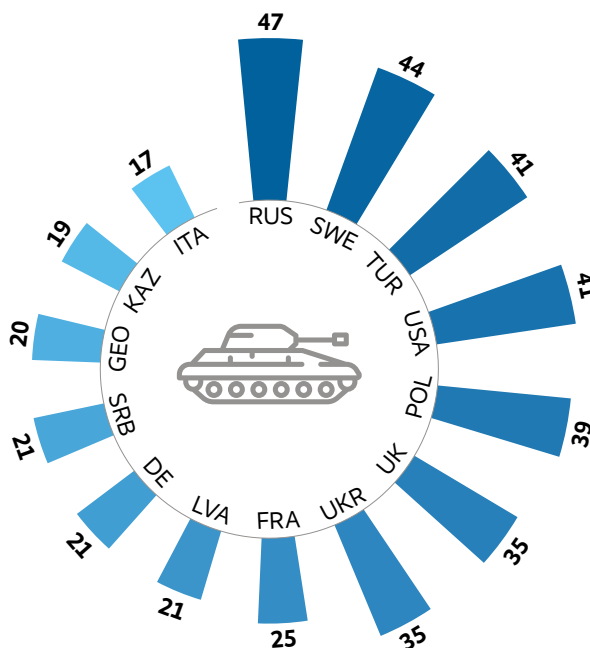
Deviations from 100% result from: 'don't know' and 'no response'

Almost as many people in Poland want to spend more money on defence (75%, well up from 53% in 2021) as in Ukraine and Georgia, who have ongoing experience of Russian aggression. This societal consensus underscores a deeply entrenched Polish fear of Russia and the feeling of insecurity, despite already spending 4% of GDP on defence. Poland is also the only country besides Georgia in which most people think that the **increase in the defence budget** should be financed by cuts in other budgets, such as social security. In all other countries, majorities would prefer a **special levy on the rich** instead. Higher taxes to finance defence are universally opposed.

Respondents in most countries oppose military interventions. Disagreement with the statement 'my country should, if necessary, pursue military intervention in conflicts' is strongest in Italy (74%, a ten-percentage point increase since 2021). Opposition has also increased in Germany and France and has remained high and stable in Latvia and in Serbia. Even in war-battered Ukraine opponents of military interventions outweigh supporters by a large margin, although the figure has declined since 2021 from 63% to 52%. In Russia, disapproval of military interventions has remained stable since 2021 (45%), but the share of those approving has increased by 10 percentage points to 47%. This may reflect a more assertive stance in the Russian population. This polarised view of military interventions in Russia is rather similar to four other countries in which approval and disapproval of military intervention in conflicts are not far apart (and have hardly changed since 2021): the US, the UK, Poland and Türkiye.

My country should, if necessary, also pursue military intervention in conflicts.

Countries ranked in descending order. Combined responses 'strongly agree' and 'somewhat agree'. All figures in %



Respondents in these »interventionist« countries have fewer reservations about the use of military force and are up to twice as likely to approve military interventions than their NATO peers.

Your country is increasing its defence budget. How do you think it should be financed?

Average across all polled countries. All figures in %



Deviations from 100% result from: 'don't know' and 'no response'

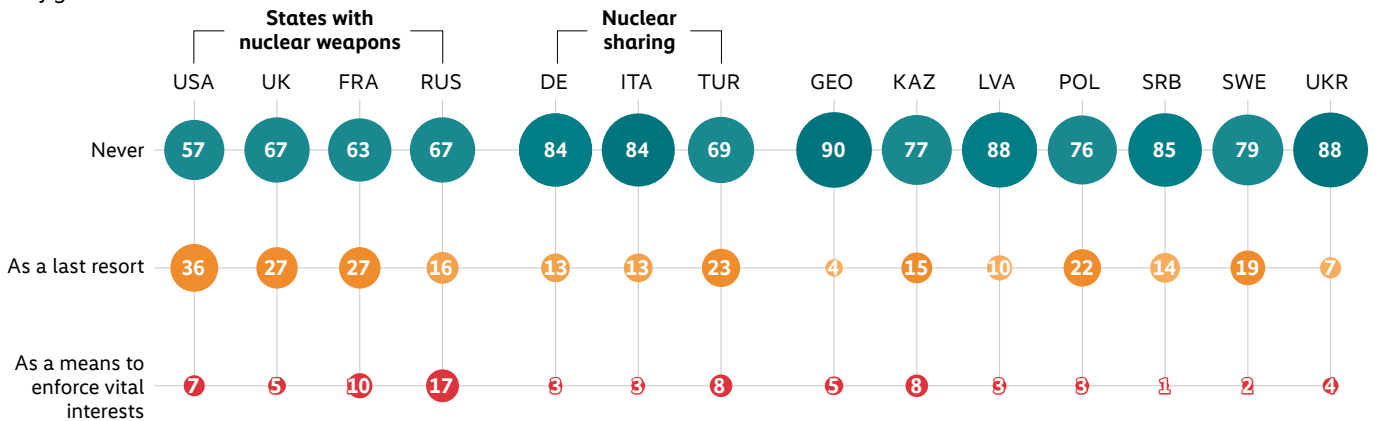
Even in war-torn Ukraine, opponents of military interventions in conflicts greatly outnumber supporters.

Military interventions as an effective instrument of foreign policy are viewed with scepticism in Italy, Germany and Serbia (and to a lesser extent in Latvia). Opinions in France, Poland and the UK are split. People in the US, Ukraine and Türkiye clearly see military means as effective (agreement has even increased since 2021). Asked about the **legitimacy of military interventions**, the trend is similar, but the group of those who doubt or oppose is bigger. Disenchantment in France is noteworthy: perception of the legitimacy of military interventions has fallen from 48% in 2021 to 37%.

Military support for Ukraine ranks high among those who think it is necessary to keep supporting Ukraine in general. Military support is the undisputed first option, far above economic and humanitarian support, for respondents living in countries allied with Ukraine: Germany, France, Latvia, Sweden, Poland, the UK and the US.

In which case is the use of nuclear weapons acceptable?

All figures in %



Deviations from 100% result from: 'don't know' and 'no response'

Only in Italy and in countries outside this formal »support coalition« does humanitarian support rank higher (Serbia, Kazakhstan, Georgia, but also Türkiye). Respondents in Ukraine itself want military support above all other types of assistance (84%, compared with 12% economic support and 3% humanitarian).



Want to know more?

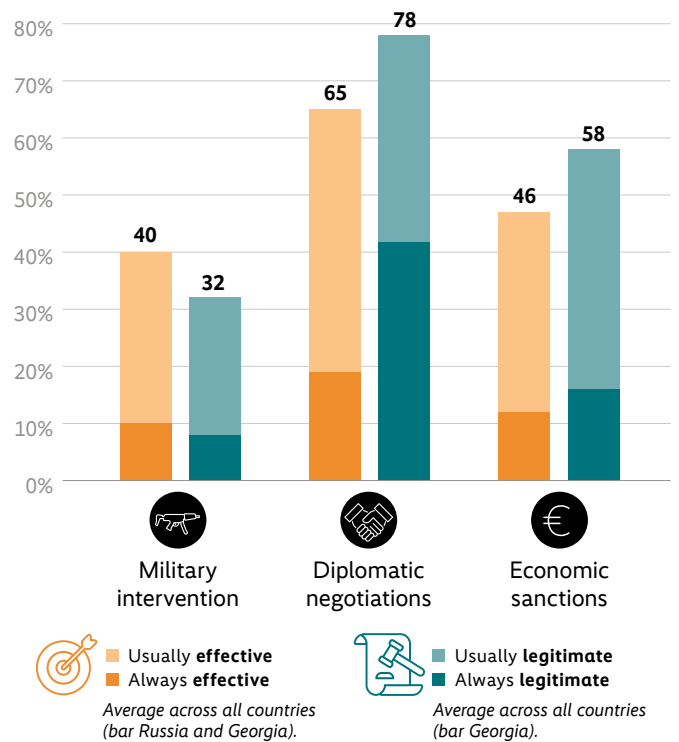
Get the detailed figures per country starting page 47.

Despite the increased acceptance of military means within the framework of foreign policy, the **use of nuclear weapons** remains taboo for absolute majorities in every polled country. However, it is disquieting that substantial minorities (between 16% and 36%) in nuclear states – Russia, the US, the UK and France – consider the use of nuclear weapons acceptable as ‘a last resort’. Alarming, this figure is by far the highest in the US. Smaller, but still considerable minorities share this opinion in countries that host American nuclear weapons as part of NATO’s nuclear sharing agreement (Germany, Italy, Türkiye), together with a worrisome 22% in Poland. This is a troubling picture at a time of nuclear sabre-rattling and a looming fear that Russia might strike Ukraine with a nuclear weapon. Even more disturbing, in Russia 17% even think a nuclear bomb can be used as a ‘means to enforce vital interests’.

The use of nuclear weapons remains a taboo for absolute majorities in each polled country.

How effective and legitimate do you believe the following means are for solving foreign policy crises?

All figures in %



Usually **effective**
Always **effective**

Average across all countries (bar Russia and Georgia).



Usually **legitimate**
Always **legitimate**

Average across all countries (bar Georgia).

War against Ukraine

There is hardly another place in Europe where current geopolitical confrontation, with all related fears and concerns, manifests itself more than in Ukraine. Three years since the onset of Russia's full-scale invasion, opinions within Ukraine and its support coalition display both a remarkable resilience and emerging doubts and war fatigue.

Unity is still being maintained...

Within the EU and NATO, there is still a remarkable unity in several respects. They are viewed similarly within Ukraine, too. Most people share the perception that it is a **war for territorial expansion** (rather than a proxy war or a conflict between democracies and autocracies); that **Russia started the war because** it is an imperialist state (rather than because it was defending its interests or had disagreements with Ukraine; only Italy is an exception); and that the end of the war is a **prerequisite for improving security in Europe**. Majorities view **Russia as the aggressor** and endorse widening of **sanctions against it**. Turkish attitudes diverge from this, reflecting the unique positioning of Erdogan's government.

The picture outside the support coalition is different. In Kazakhstan, Serbia, Georgia and Türkiye the war is viewed through a geopolitical lens. Most people in these countries say it is a proxy war on Ukrainian soil between Russia and

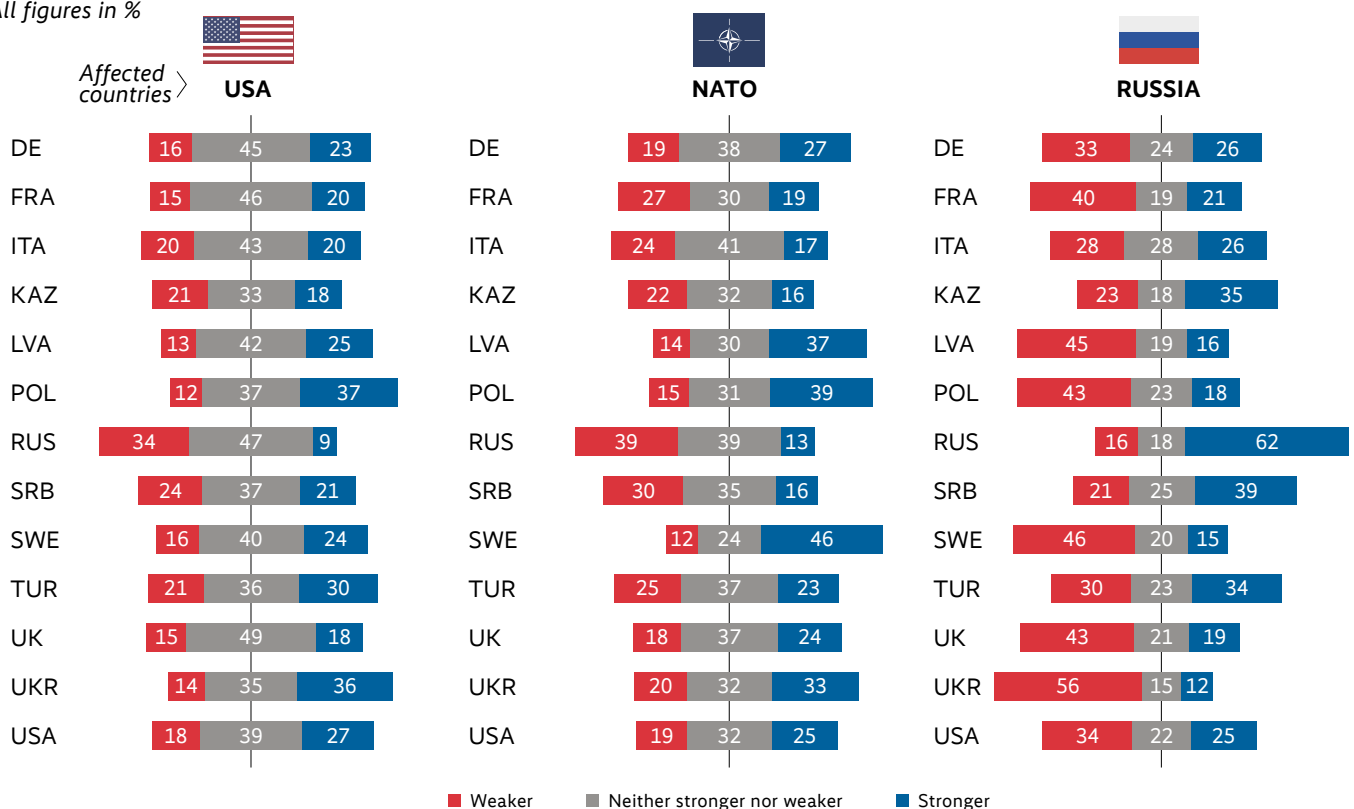
the West, each vying for global influence. In Kazakhstan, Serbia and Türkiye people believe that Russia invaded Ukraine because it was defending its interests, not because of imperialist ambitions. Most respondents in Kazakhstan and Serbia do not view Russia as responsible for the war and oppose sanctions (see graph on page 34).

... but what course of action?

Despite the shared analysis of the situation within Ukraine's support coalition, people seem to lack a common understanding of further courses of action. Take the statement **'the war in Ukraine is a war between Russia and Ukraine, in which no third country should intervene'**. It was posed already in 2021, before the full-scale invasion, and thus allows for a comparison over time. Respondents fall into three unequal groups. Respondents in Germany and Türkiye endorse the statement and support a non-interventionist stance; agreement there has even increased

What effect, if any, does Russia's war in Ukraine have on the following organisations or countries?

All figures in %



since 2021. People disagreeing and thus wishing for an internationalisation of the conflict are found in Ukraine itself and also the UK, Poland, Latvia and France. Opinion is divided in Italy and the US.

Within Ukraine's support coalition, people seem to lack a common understanding of further courses of action.

There is also no common understanding regarding the **effect of the war** on NATO, the EU and respondents' own country (whether it has become stronger or weaker). People in Latvia, Poland and Sweden (»new« members of NATO) are much more positive than people in Germany, France and Italy (»old« members of NATO). People in Ukraine demonstrate defiance and are even more positive.

However, our comparative data for Germany, France, Latvia and Poland show that the longer the war drags on, the stronger the disillusionment. Respondents in all four countries demonstrate a lower confidence in 2024 than in 2022 that the EU, NATO, the US or their own country have become stronger as a result of the war. Conversely, the sense that China and Russia have been strengthened by the war has increased in all four countries.

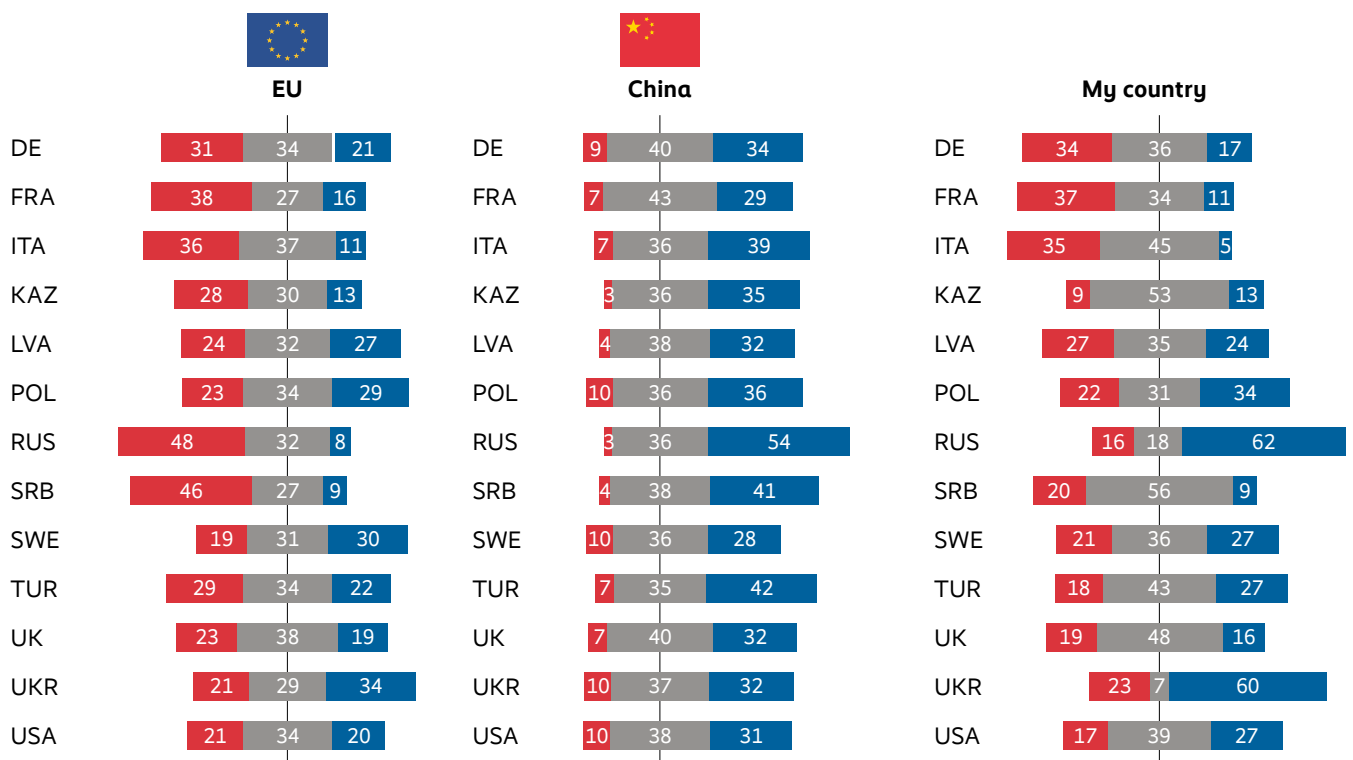
Overall, the assessment that the war has had a detrimental effect will make it harder for governments to rally support for further aid to Ukraine, especially when budgets are strained. This may be particularly the case for Germany, Ukraine's biggest European supporter.

The way forward once the fighting stops remains opaque, too. The most divisive issue is Ukraine's potential membership of the EU and NATO. Again, respondents fall into different camps, mostly congruent with the policy of the respective state. Germans and French people oppose **EU membership for Ukraine**. Latvians, Poles and Swedes, as well as Brits and Americans, support it by a wide margin. Opinion in Italy is divided. The issue of **NATO membership** is even more contentious. Germans, French and Italians clearly oppose it; Latvians, Poles, Swedes, British people and Americans endorse it; Turkish opinion is split.

A notable trend can be observed in Germany, France, Latvia and Poland – the four countries that were included not only in the poll in autumn 2021, but also in autumn 2022, nine months into the war. While in all four countries support for Ukrainian EU and NATO membership increased between 2021 and 2022, it dropped again in 2024. Overall, support in 2024 is still higher than back in 2021, before debates about Ukrainian EU and NATO membership intensified after the full-scale invasion (and before Ukraine was awarded EU candidacy status in summer 2022).

But the fact that support has fallen throughout the war, between 2022 and 2024, is a worrisome signal of declining public backing for these steps.

In Germany, France, Latvia, and Poland, support for Ukraine's EU and NATO membership is higher than back in 2021 but lower than in 2022.



Deviations from 100% result from: 'don't know' and 'no response'.

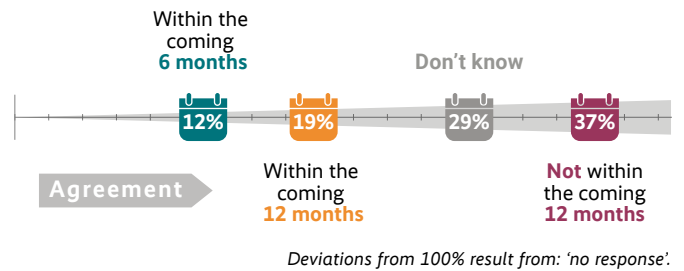
War fatigue

Waning support for Ukrainian EU and NATO membership in key European states reflects a general sense of war fatigue and a wish to keep it at a distance.

There is no sense that an end to the war is in sight. Most of those surveyed believe that **the war will not be over** within the coming 12 months. In Germany, France, Latvia and Poland the shares of those who believed that the war will end within the next 12 months nearly halved between 2022 and 2024, indicating a sense of fading hope. People feel that the war is here to stay.

The general public mood favours continuing to support Ukraine, but majorities are not stable everywhere. When asked whether it is **necessary to keep supporting Ukraine**, the strongest majorities are found in Latvia, Sweden and the UK. But the lack of absolute majorities in crucial states such as Germany (48%) and Italy (42%), as well as fairly low numbers in Poland (53%) and especially the US (50%) are cause for concern. In the United States support clearly follows partisan lines, with Democratic voters (70%) more than twice as willing to keep supporting Ukraine as Republican voters (33%). Military support is chosen as the primary mode of support in polled EU and NATO countries.

In your opinion, when will the war between Russia and Ukraine come to an end?



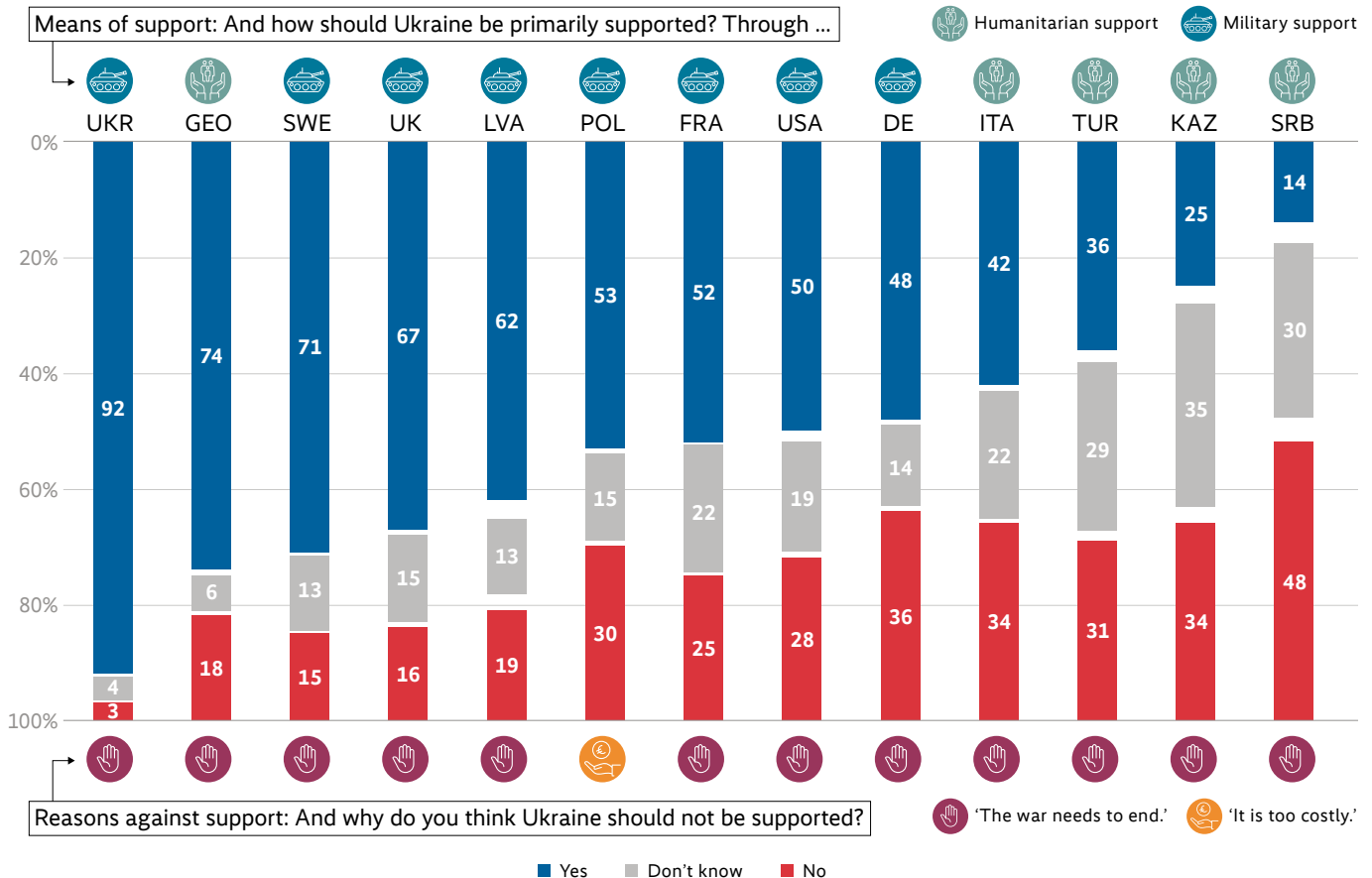
Only in Italy and Türkiye do relative majorities cite humanitarian support. Economic support ranks a distant third.

Within the EU, Poland has a relatively high share of opponents of further support for Ukraine (30%), despite positioning itself as a staunch supporter. Among the opponents, almost half cite the high cost as the reason. In comparison, among German and French opponents of further support for Ukraine, overwhelming majorities offer 'the war needs to end' as their reason.

People feel that the war is here to stay.

Do you think it is necessary to keep supporting Ukraine?

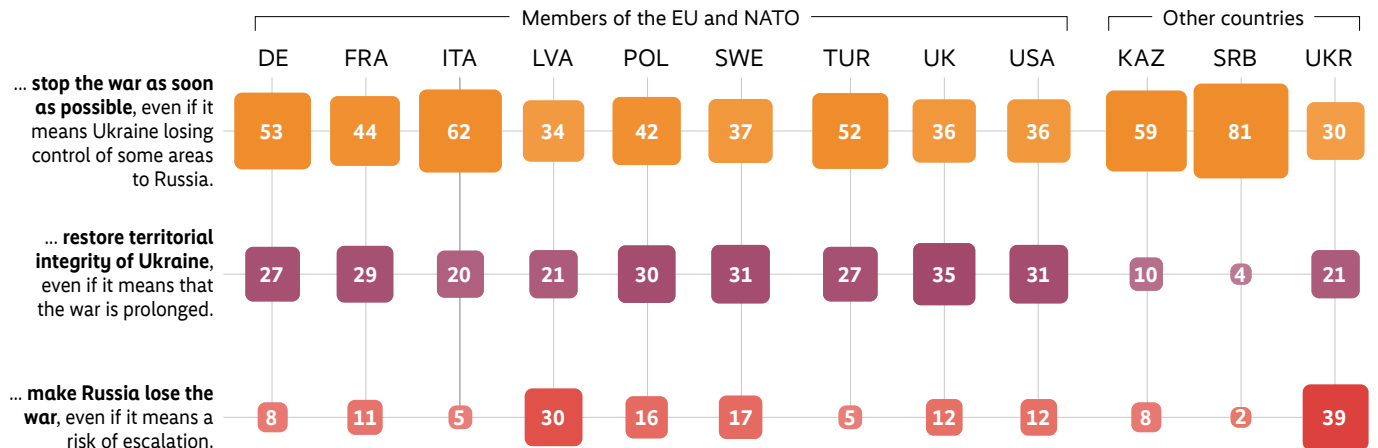
All figures in %



The means or reason with the highest support are depicted (choice from three). Deviations from 100% result from: 'no response'

The most important thing is to...

Respondents were asked to choose the statement that came closest to their view. All figures in %



Deviations from 100% result from: 'don't know' and 'no response'.

When asked directly about military support, the wish to avoid getting embroiled in the war is striking. **Sending one's own country's troops to Ukraine** is a clear red line for citizens of every country, without exception. The proportion of 'strongly disagree' is conspicuous in every country and is among the highest values in the entire poll. Coupled with a low 'don't know' rate, it indicates that people have a clear and strong opinion on the issue. Even in outlier Sweden, the unusually high 27% in favour of sending troops are pitted against 58% opposing it, most of them strongly.

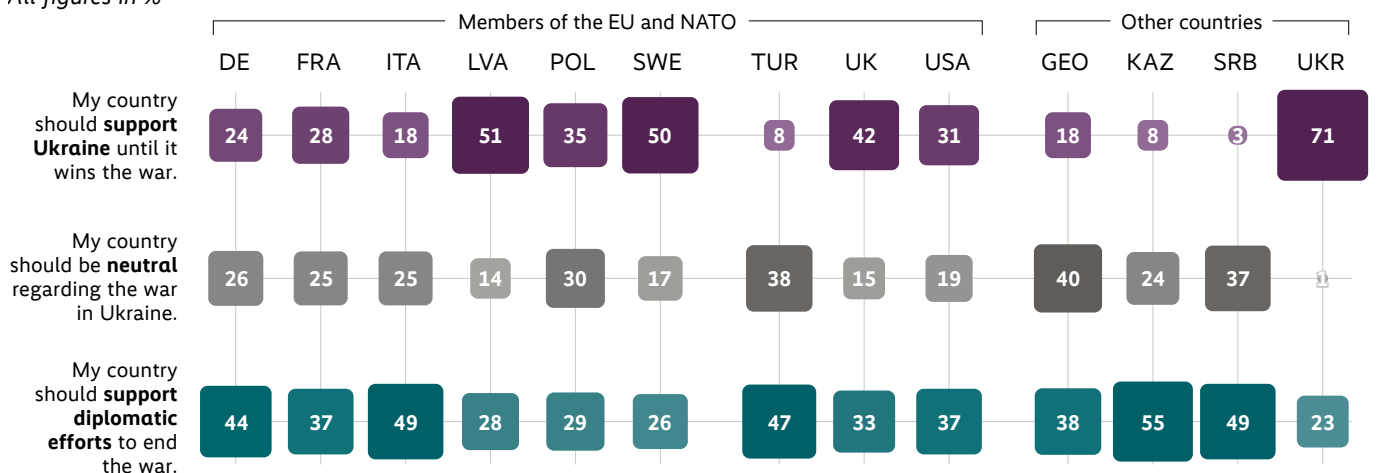
With regard to **providing more weapons to the Ukrainian military**, in no country except Sweden, the UK and the US do proponents outweigh opposers. Opposition is particularly clear in Germany, Italy and Türkiye, where absolute majorities are against sending more weapons. In France and even Poland, the opposition is close to an absolute majority (both 47%).

Notably, opposition to sending troops in Germany, France, Latvia and Poland has increased markedly since the question was first asked in 2022. In a similar vein, support for providing more weapons has decreased in all four states.

Sending troops to Ukraine is a clear red line for citizens of every polled country.

What position should your country take in the war in Ukraine?

All figures in %



Deviations from 100% result from: 'don't know' and 'no response'.

Wish for a diplomatic solution

Opinions on **ending the war** are remarkably clear in most cases. Majorities, sometimes strong absolute majorities (as in Italy, Germany and Türkiye) believe that **'the most important thing is to stop the war as soon as possible, even if it means Ukraine losing control of some areas to Russia'**. This is congruent with a possible peace formula »territory for peace«, increasingly discussed in political circles in the US but also Ukraine. The second-most frequently named option is **'the most important thing is to restore the territorial integrity of Ukraine, even if it means that the war is prolonged'**. It features prominently, though less than the first option, in the US, the UK, Poland and Sweden, countries whose governments often cast themselves as representatives of the so-called »justice camp«. In Ukraine itself, most people (39%) opt for the third possibility, namely **'the most important thing is to make Russia lose the war, even if it means a risk of escalation'**. This opinion is partially shared only in Latvia (30%).

When asked about the likely **outcome of the war**, most people do not believe there will be a military victory on either side. Opinion in all countries, including Ukraine,

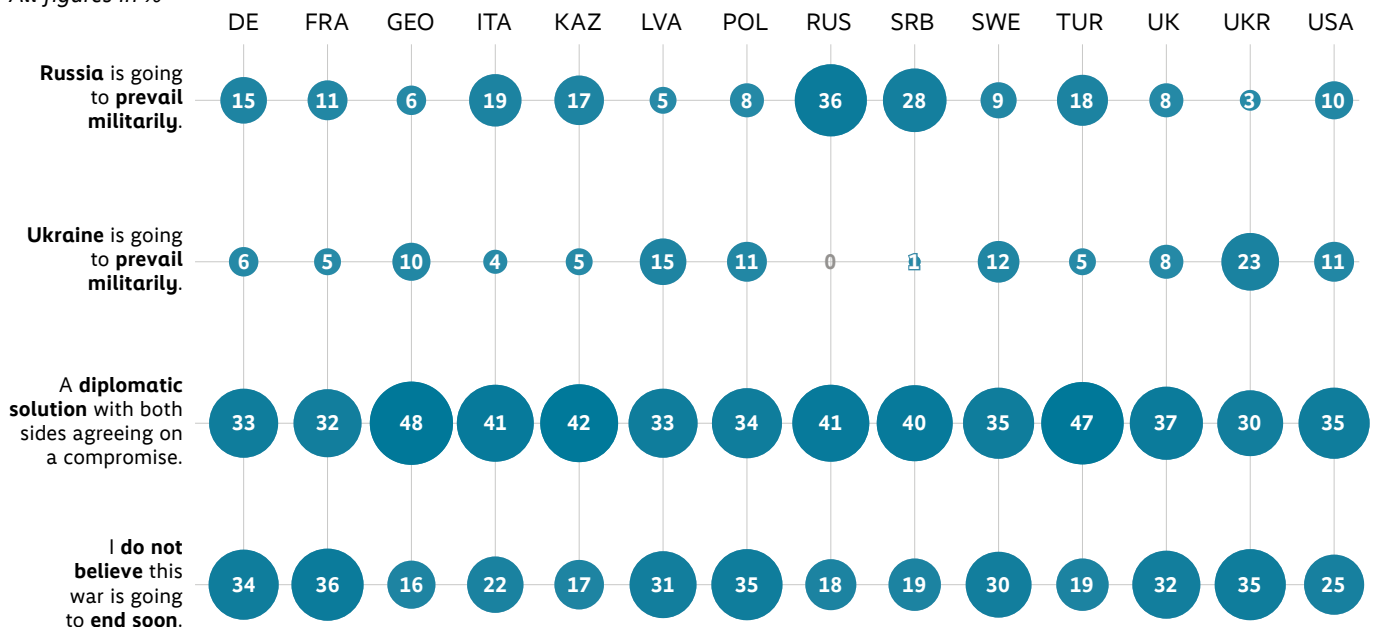
is split between 'a diplomatic solution with both sides agreeing on a compromise' and 'the war is not going to end soon'. In Italy and countries outside the EU (Georgia, Kazakhstan, Serbia, Türkiye) opinion is even tilted in favour of a diplomatic solution. In Ukraine proper, only 23% believe that Ukraine is going to win; more people believe in a diplomatic solution (30%) but even more doubt that the end is in sight (35%).

Most people do not believe there will be a military victory on either side.

The wish for a diplomatic solution is mirrored in opinions on the appropriate **position of one's country in the war in Ukraine**. Only citizens of countries in the »justice camp« wish their countries to support Ukraine until it wins the war (the UK, Latvia, Poland, Sweden). Most people in countries that are Ukraine's main supporters, namely Germany and the US, as well as France, Italy and Türkiye, wish to support diplomatic efforts to end the war. Substantial shares in Germany, France, Italy (all around 25%) and Poland (a surprising 30%) wish their countries to be neutral in the war.

How do you believe this war is going to end?

All figures in %

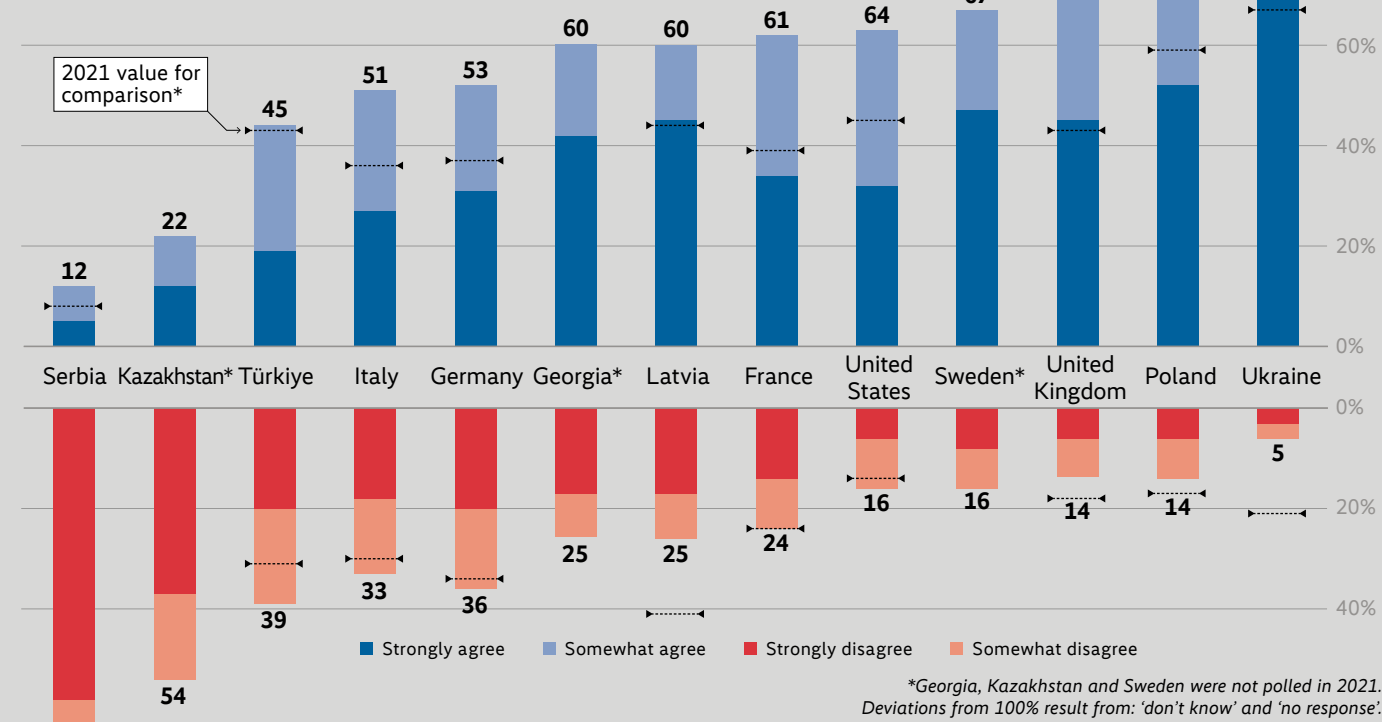


Deviations from 100% result from: 'don't know' and 'no response'.

Attitudes to the war against Ukraine

Sanctions against Russia should be widened.

Countries ranked in ascending order. All figures in %



*Georgia, Kazakhstan and Sweden were not polled in 2021. Deviations from 100% result from: 'don't know' and 'no response'.

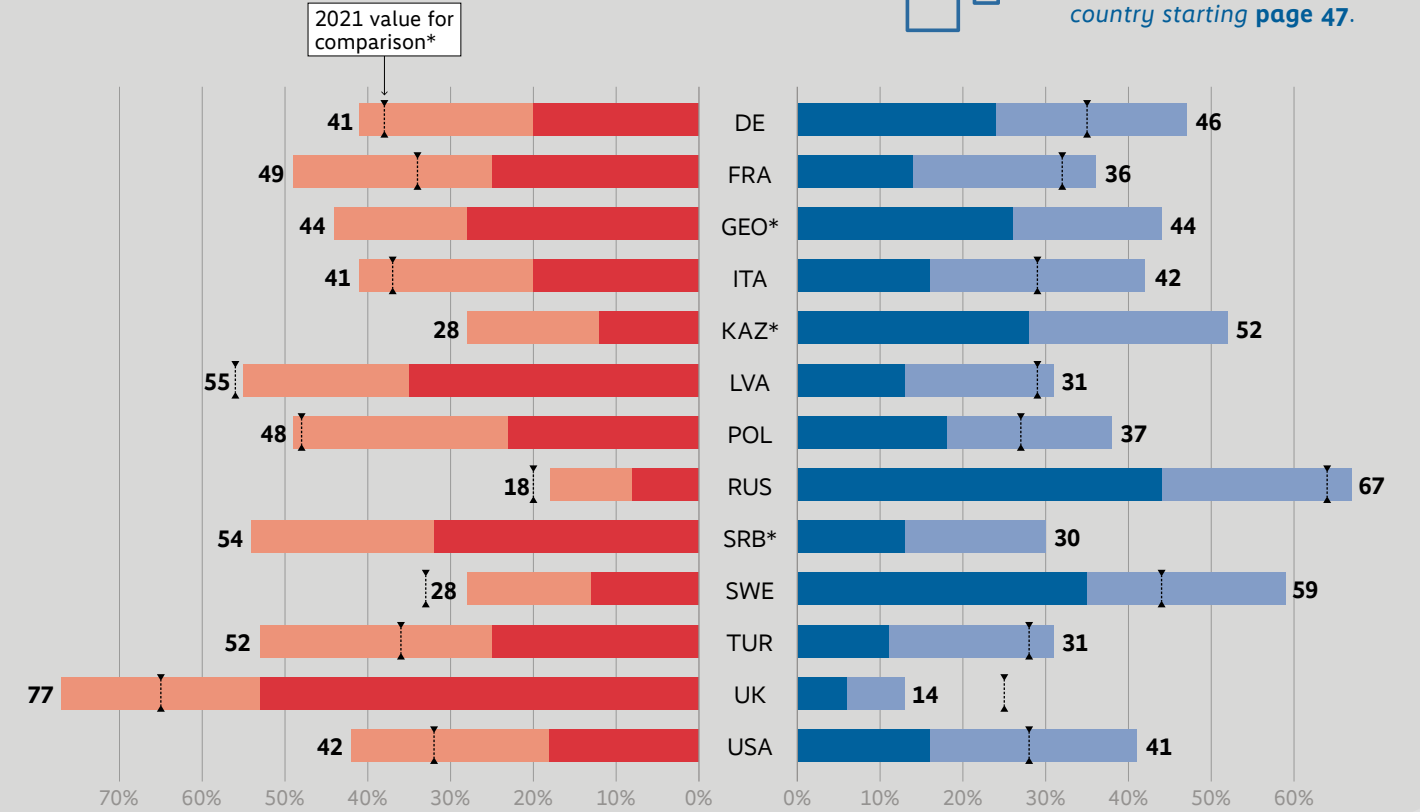
The war in Ukraine is a war between Ukraine and Russia in which no third country should intervene.

All figures in %



Want to know more?

Get the detailed figures per country starting page 47.



*Georgia, Kazakhstan and Sweden were not polled in 2021. Deviations from 100% result from: 'don't know' and 'no response'.

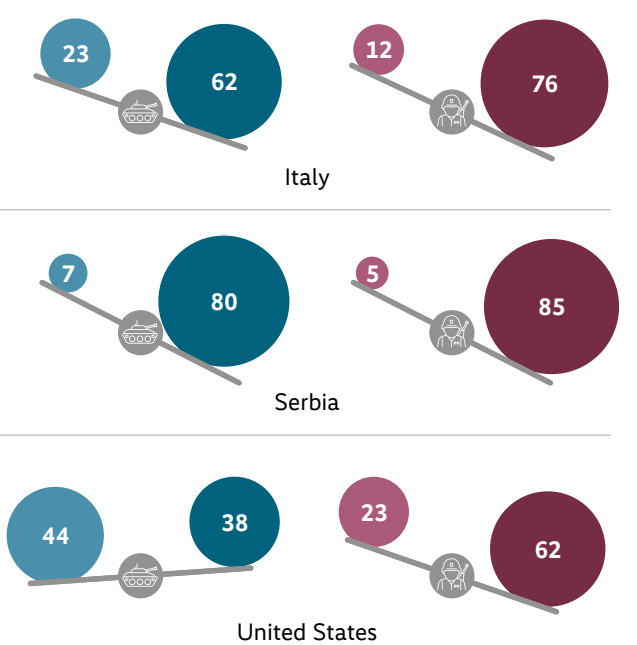
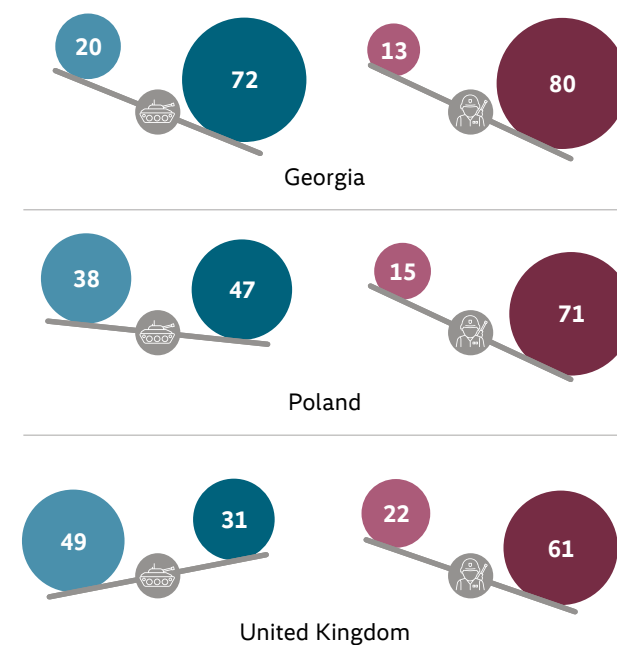
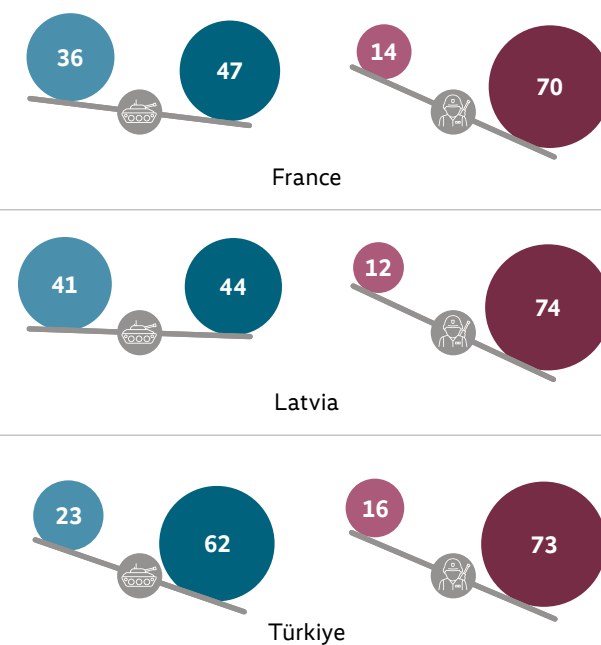
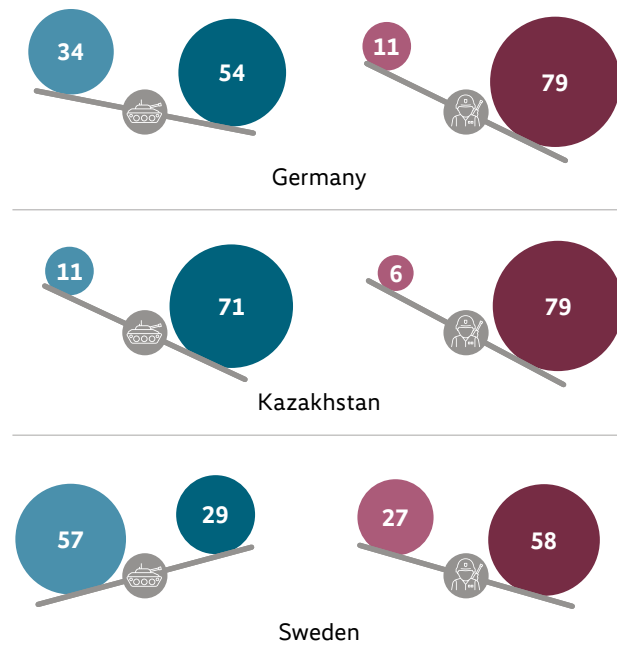
How would you assess the following statements against the background of Russia's war in Ukraine?

Combined responses 'strongly agree' and 'somewhat agree'. All figures in %



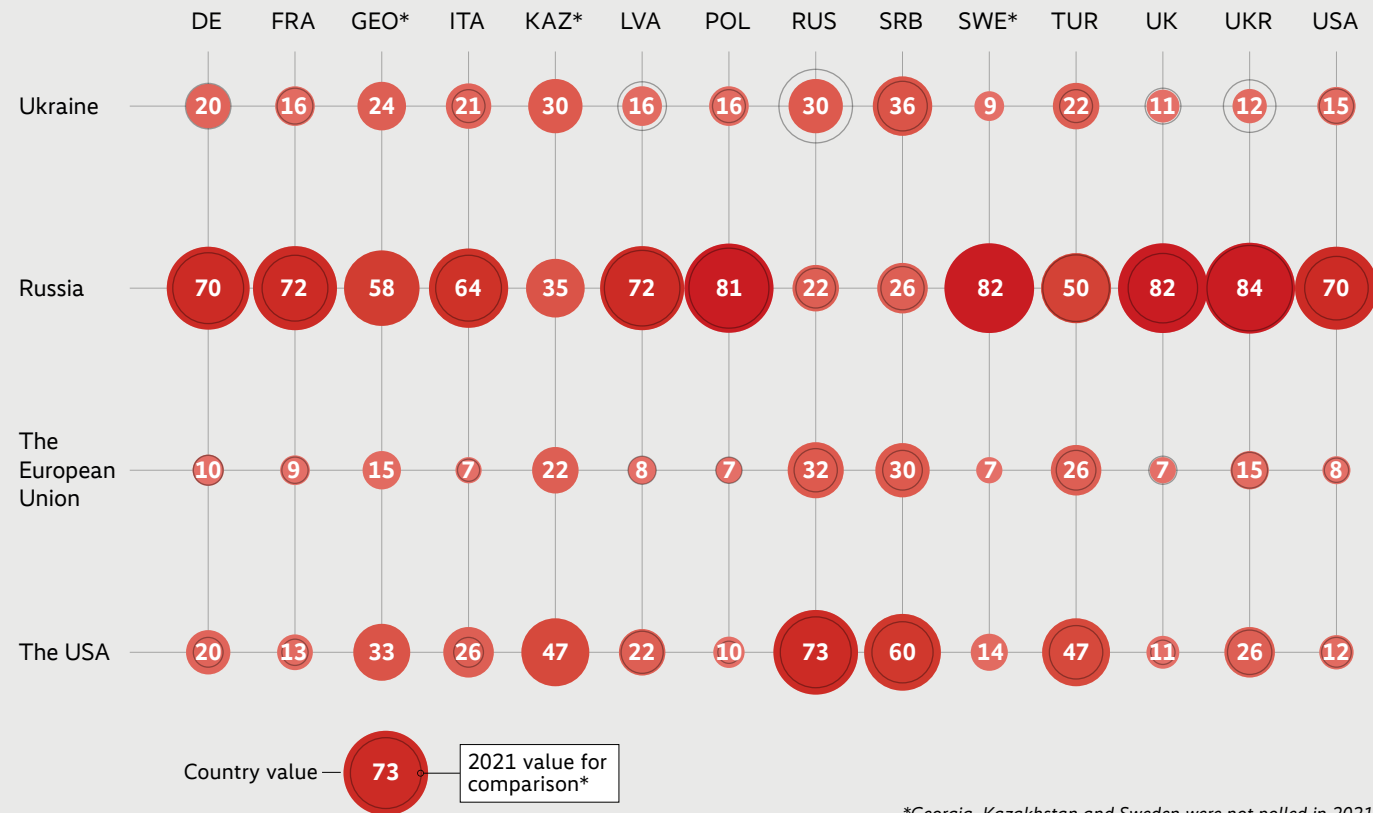
'My country should provide more weapons to the Ukrainian military.'

'My country should send troops to Ukraine.'



In your view, who is responsible for the war in Ukraine?

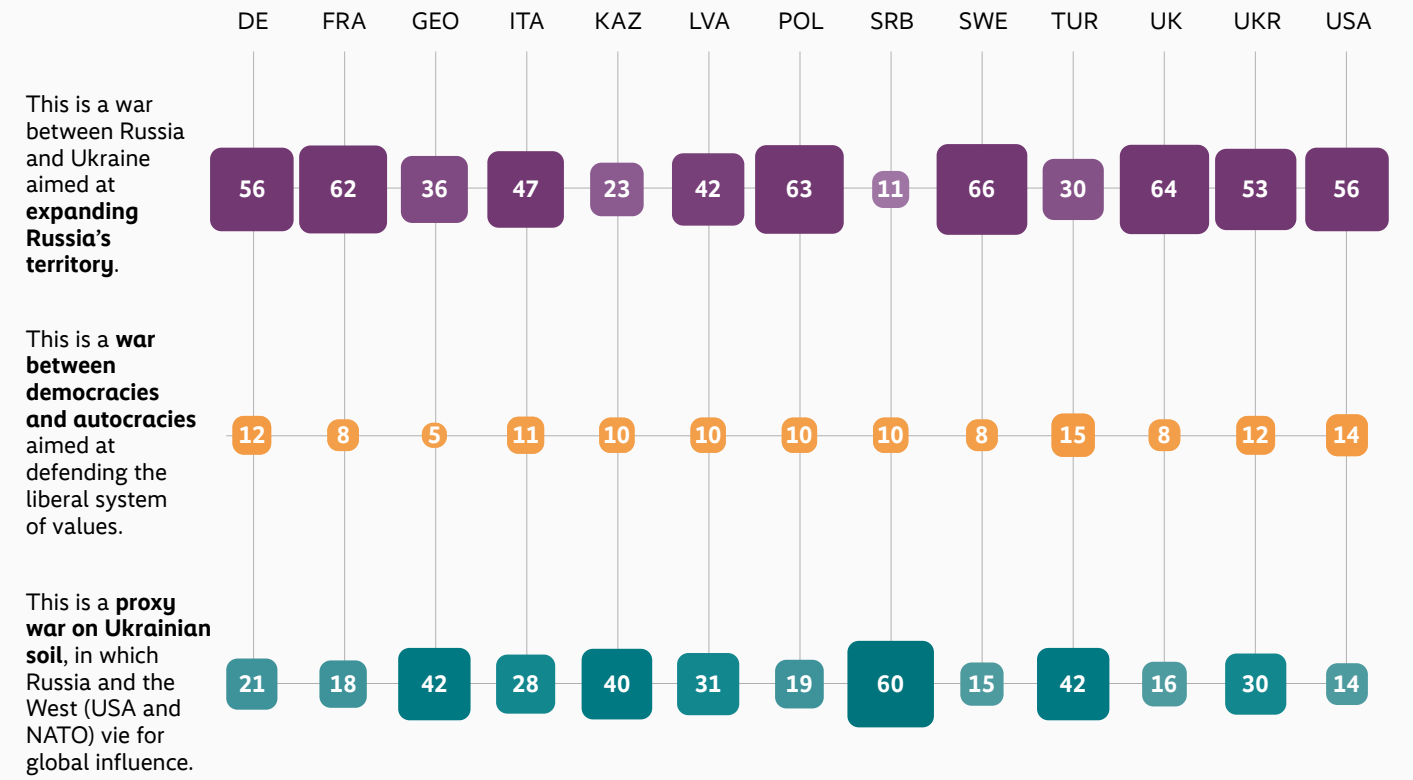
All figures in %



*Georgia, Kazakhstan and Sweden were not polled in 2021. Multiple answers possible, thus the total exceeds 100%.

How would you characterise Russia's war in Ukraine?

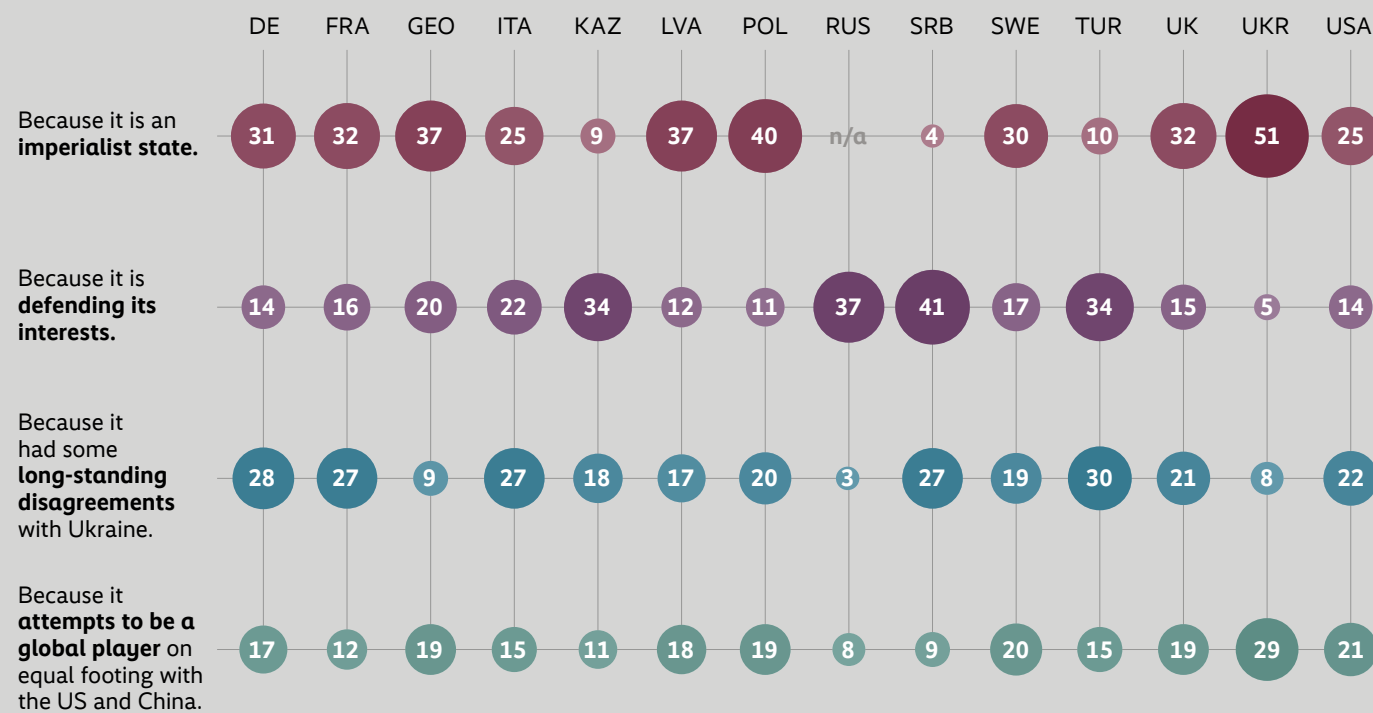
All figures in %



Deviations from 100% result from: 'don't know' and 'no response'.

Why do you think Russia invaded Ukraine?

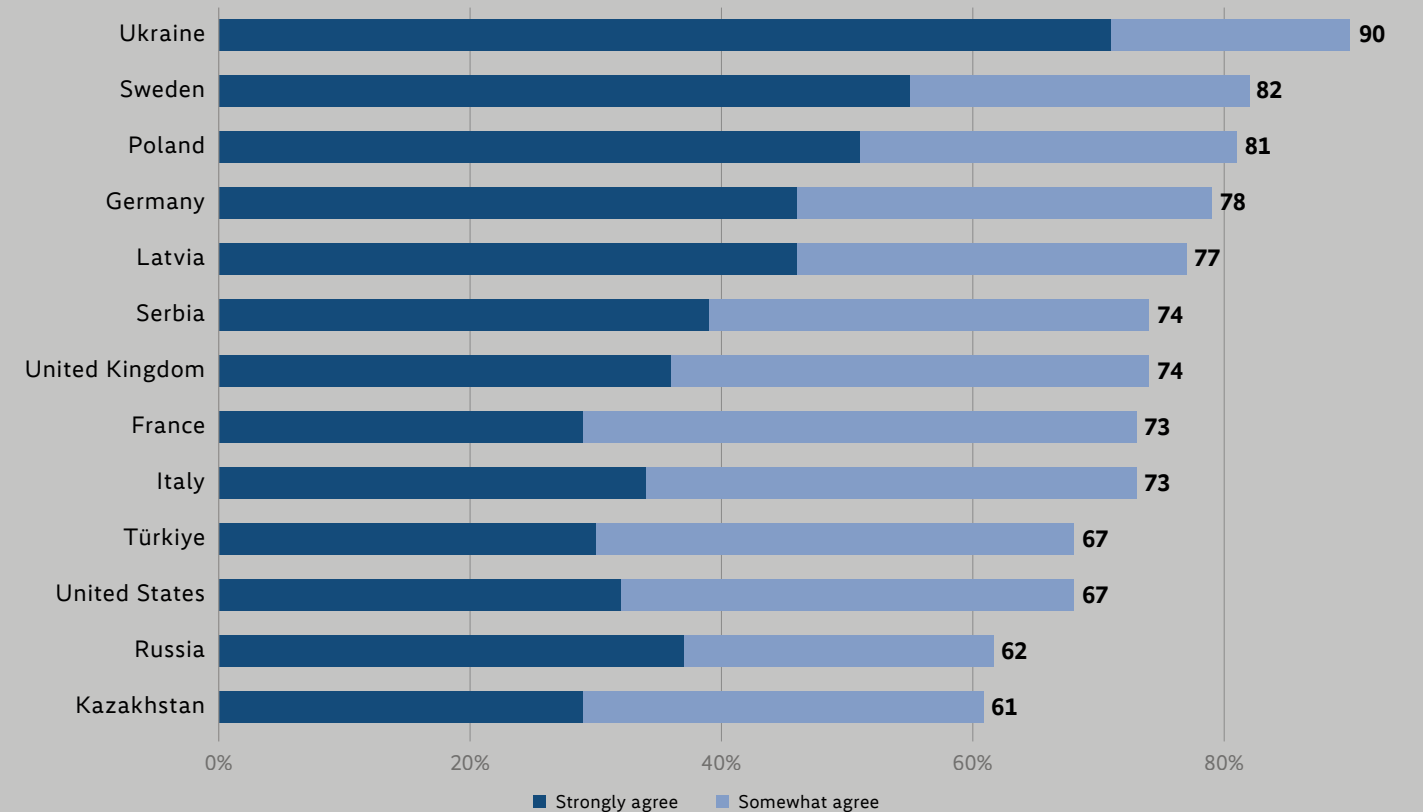
All figures in %



Deviations from 100% result from: 'don't know' and 'no response'.

The end of Russia's war in Ukraine is a pre-requisite for improving security in Europe.

Countries ranked in descending order. All figures in %



Wrong place, wrong time – the EU in geopolitics?

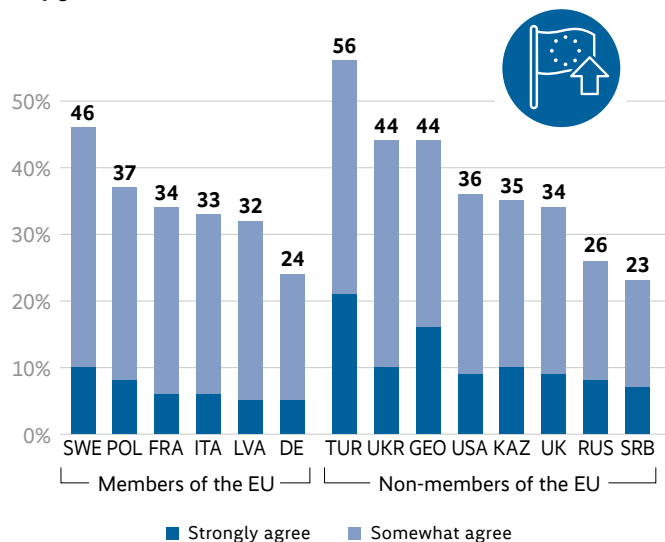
In a more polarised world, in which the currency of hard power and military might is gaining ground, respondents in all 14 countries seem to have difficulties finding a place or a role for the EU. Notably, there is not a single question in our survey on which citizens of the six analysed EU member states show a distinctive response pattern compared with the other countries. Thus, EU membership is not a factor explaining how populations regard the world in general or the EU's role in it. The image of the EU emerging from our poll is one characterised by lack of military power, as well as internal differences. Nonetheless, the EU is generally viewed quite positively, and outside the Union even more so than within.

Generally there is a high degree of support for the European Union. A majority of respondents in all countries (bar Russia) want it to play a bigger role in the future. This number is even higher in the six EU members included in the poll. However, when looking at relative standing and resources, the picture becomes more nuanced.

The EU is not perceived as on the way to becoming a global power, taking a distinct position from China and the US. Here the perspective from inside is even more pessimistic than from outside (with the exception of Sweden, where 11% more believe that the EU is becoming a global power than those who do not). To illustrate this point, Germans (24%) are even less convinced about the EU becoming a global power than Russians (26%). Interestingly, Americans regard this development considerably more optimistically than the French and Poles, among whom a relative majority are pessimistic about the EU becoming a global power.

The European Union is becoming a global power, taking a distinct position from China and the US.

All figures in %



Which of the organisations mentioned should play a bigger role in the future?

Response 'Yes, it should play a bigger role.'

	UN United Nations	NATO North Atlantic Treaty Organization	OSCE Organization for Security and Cooperation in Europe	EU European Union
Germany	48	47	47	49
France	60	48	43	56
Italy	61	39	52	63
Kazakhstan	65	27	50	42
Latvia	61	62	52	67
Poland	66	76	57	57
Russia	51	14	48	30
Serbia	60	9	53	42
Sweden	63	49	46	51
Türkiye	67	56	54	61
United Kingdom	62	53	42	53
Ukraine	70	77	63	79
United States	57	53	36	46

The question was not asked in Georgia.

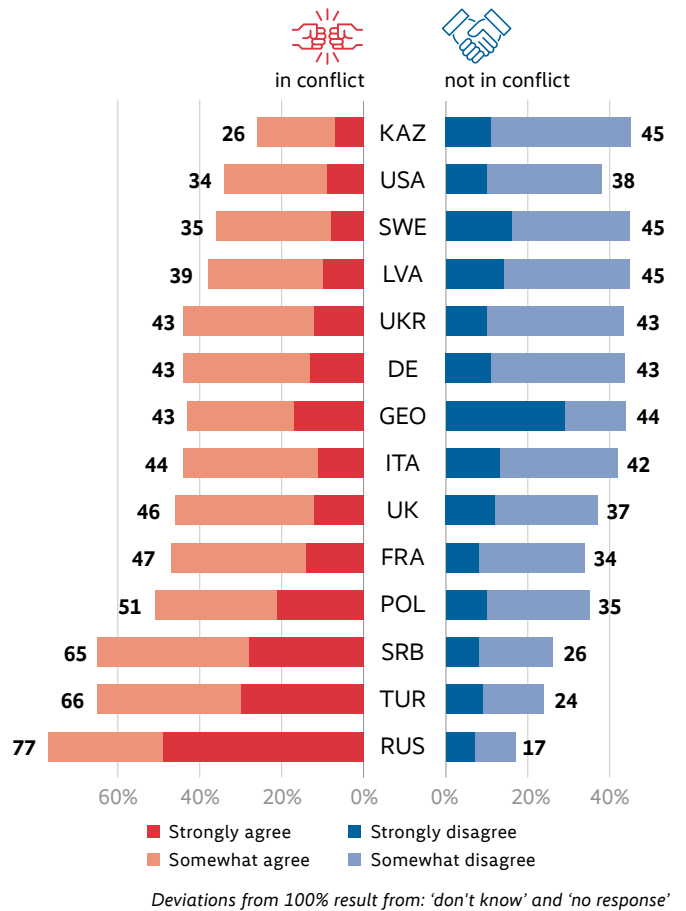
When asked **whether EU policies regularly conflict with their country's interests**, respondents in most countries tend to agree rather than disagree. The highest levels of agreement are observed in Russia (77%), as well as in Serbia and Türkiye (over 65%). The EU average stands at 43%, with Poland notably higher at 51%. Accordingly, there is little confidence in **the EU's ability to defend itself without the US**. In all EU countries a relative majority believe that this is not possible, whereas from outside the EU, even in the UK and the US, the perception is slightly more positive. In Russia a surprising 68% believe in the EU's defence capabilities, in marked contrast to the official propaganda there that ridicules the Union as weak and disoriented. Adding the views from accession candidates such as Serbia, Georgia and Ukraine, as well as Kazakhstan and Türkiye, reveals mixed picture. The EU seems to be held in rather high regard in Türkiye, as well as in the new candidate countries Georgia and Ukraine, both of which are in need of international support, while in Serbia and Kazakhstan the assessment is more modest.

In Russia a surprising 68% believe in the EU's defence capabilities without the US.

Looking forward, there is a sense of how to deal with this suboptimal situation. Building up a **European Army** is supported by relative majorities in the polled EU member states and even in the US agreement with this has risen since 2021. The same goes for the **independence of the EU from the US**. This was supported by significant majorities inside and outside the EU, even before Donald Trump won the presidential election in 2024. These numbers show a clear sense of the shortcomings of the EU and potential remedies to deal with that. It might, however, be quite difficult to translate this societal support into political action.

The politics of the European Union is regularly in conflict with the interests of my country.

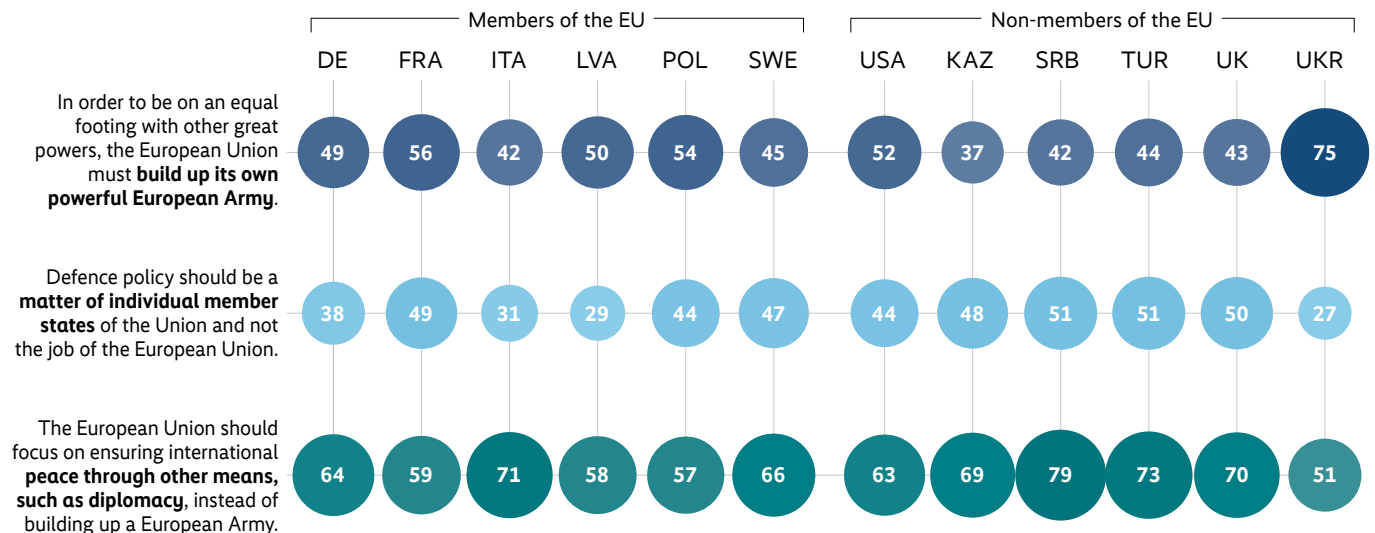
Countries ranked in ascending order. All figures in %



Politically, respondents preferring a more independent EU from the US are politically rather diverse. Voters of far-right parties and leftist parties alike agree with this statement as do some voters in the political centre.

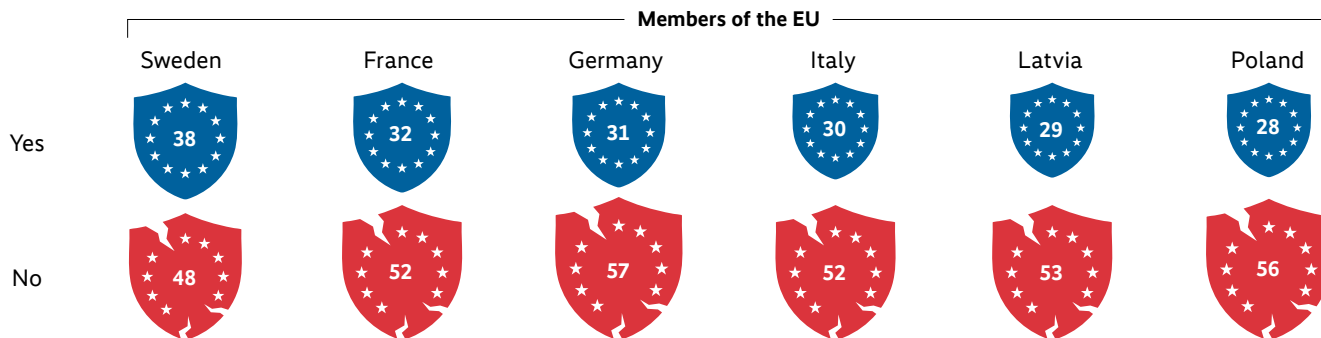
How do you think the European Union should position itself?

Combined responses 'strongly agree' and 'somewhat agree'. All figures in %



In your opinion, is the EU able to defend itself without the USA?

Countries ranked in descending order. All figures in %



Poland shows a Janus-faced position, aligning on some issues with the Weimar Triangle, and on others with its Baltic neighbours.

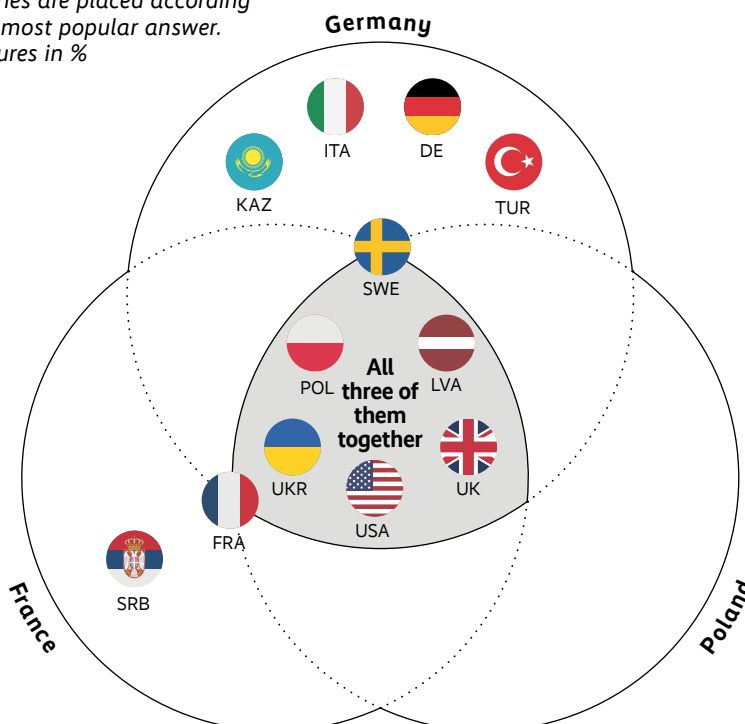
Two internal problems affecting a global role for the EU can be observed in our poll: unity and leadership. First, on unity: the six countries included in our sample show significant coherence on a number of matters. Notably the perception of Russia as a threat to European security is shared among all EU members in the survey. Following from that, there is broad agreement on the question of cooperation with Russia, as well as the necessity of decoupling from Russia. But rifts are already visible when the same questions are asked about China, especially concerning decoupling. Here, Latvia is a clear outlier, with Polish respondents also more reluctant than people in the other four countries. However, the real split occurs in all matters regarding Ukraine. Here, even in our sample of six, a division between north-eastern EU member states and south-western members can be observed, even though Poland shows an interestingly Janus-faced position, aligning on some issues with the Weimar Triangle, and on others with its Baltic neighbours. In France, Germany and Italy, fatigue concerning Ukraine has set in, and there are no clear majorities for continued support, nor for its membership of the EU and NATO. In Sweden, Latvia and Poland, on the other hand, things are mainly different, reflecting the Nordic-Baltic Summit in November 2024, at which stronger and continued support for Ukraine was discussed. In our sample this group of EU states is closest to the UK, and is a constellation of countries that has also been gaining influence in NATO.

Diverging popular positions have also been translated into different policies of the member states, undermining the EU's ability to agree on common positions and strategies towards Ukraine.

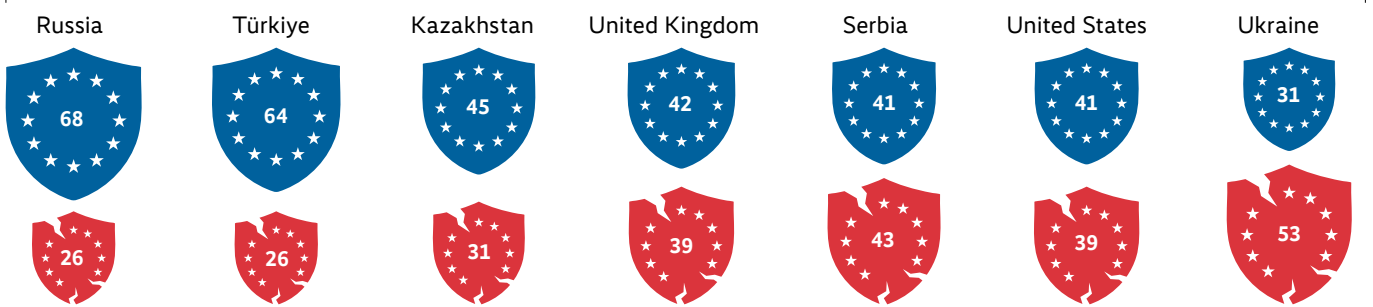
The second issue, leadership, offers a rather complicated perspective on resolving this disunity in the future. When asked about **countries that might potentially lead the EU in security policy**, there is no one country on which respondents inside the EU can agree. French and German respondents would prefer their own country to take the lead, but trust in both of these countries is rather low in the other polled EU members, and even lower in Poland.

Which country would you trust to be a leader in a common EU security policy in the future?

Countries are placed according to the most popular answer. All figures in %



Non-members of the EU



Deviations from 100% result from: 'don't know' and 'no response'

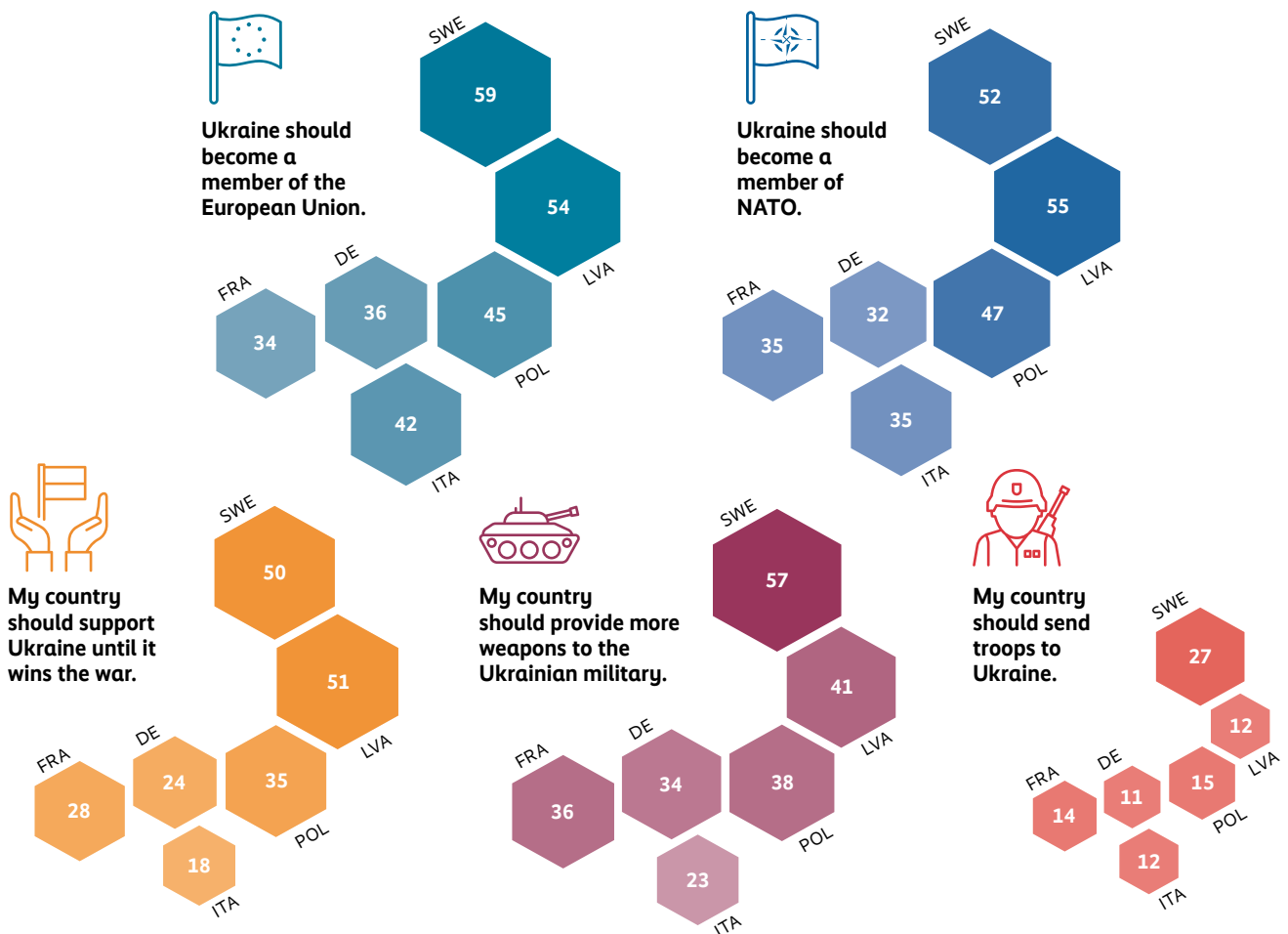
The only constellation that garners trust in nearly all of the polled EU member state is the Weimar triangle of Germany, France, and Poland. However, in Italy even this garners little trust: only 14% would prefer it, in contrast to 21% who prefer German leadership. A potential silver lining is the fact that in Italy, France, Germany and Poland respondents support a stronger leadership role for their own country, as

well as a strengthening of the EU institutions. This could offer at least a medium-term prospect with regard to filling the leadership vacuum in the EU.

The combination of an EU divided and leaderless in the current situation may fuel the Union's rather bleak prospect of becoming a serious player in geopolitics.

How would you assess the following statements against the background of Russia's war against Ukraine?

Combined responses 'strongly agree' and 'somewhat agree'. All figures in %



From threat to trust: strengthening international organisations

At a time when conflicts and confrontation are on the rise, cooperation between countries is brittle and the role of international organisations in coping with common challenges more important than ever. Despite the trends outlined above towards isolation and polarisation, in all the countries surveyed, international organisations are still seen as key instruments for promoting international peace, second only to diplomatic efforts.

Despite the above-described trends towards isolationism and cooperation with the like-minded, people are still open to pragmatic cooperation when it serves a higher purpose. A majority agree that their countries should **cooperate with others, even those with different values**, if it promotes global peace and security. A majority also believe that their country should pursue an **active foreign policy** and play a significant role in solving international problems, crises and conflicts. This underlines the ongoing relevance of elements of cooperative security. At the same time, scepticism about the basis of such cooperation is visible. Over 50% of respondents in Ukraine, Russia, Kazakhstan, Serbia, Türkiye and even France express doubts about the importance of laws and rules in international relations today. Less than 50% want their country to take on more **international responsibilities** and help other states, including if there are no direct benefits for their own country, with the lowest levels of agreement in the UK, Italy and Kazakhstan.

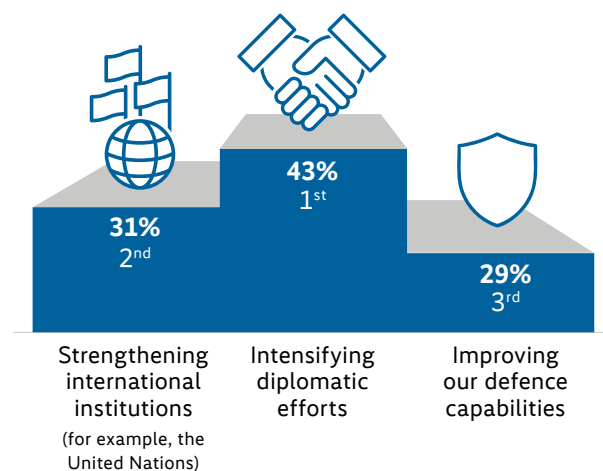
International organisations

A closer look at four different international organisations reveals an interesting picture. In most of the surveyed countries, approval or disapproval concerning the future role of the respective organisations is closely linked to the national foreign policy profile.

The UN has the highest approval rating of all international organisations.

First, when asked which organisations should play a bigger role in the future, the **United Nations** (UN) enjoys the highest approval, with 61% in favour. Germany is the outlier at the lower end of the spectrum on 48% in favour, followed by Russia (51%). Nonetheless, in Russia, the UN has the highest approval rating of all international organisations, which is telling considering the overall standing of international cooperation in the country. The United States follows with 57%, while support in other regions is close to 70%.

What are the most important elements to promote international peace?



Average across all countries (bar Georgia and Russia). Multiple responses allowed.

Türkiye and Ukraine show particularly high levels of trust in the role of the UN. Ukraine is generally at the higher end of the spectrum concerning all organisations, highlighting its need for international support.

Second, the **European Union** receives 53% approval for a bigger role in future, with respondents from the surveyed EU member states showing a rate of 57% in favour. Germany is the only EU country showing low support, below 50%, and the country with the highest rate with regard to 'should not play a greater role' (35%) among all EU members. Latvia and Italy show the highest levels of approval of the EU among EU countries. Outside the EU, clear rejection of a bigger role for the EU is found only in Russia (54%). In non-European countries, support is above 40% in Kazakhstan (42%), Serbia (where opinion is divided at 42% in favour and 46% against) and the United States (46%). Türkiye (61%) and Ukraine (79%) are the non-EU countries that want the European Union to play a greater role, while in Russia support is at a mere 30%. These differences, specifically between the EU candidate countries Serbia and Türkiye, highlight the challenges the EU faces in gaining trust beyond its borders.

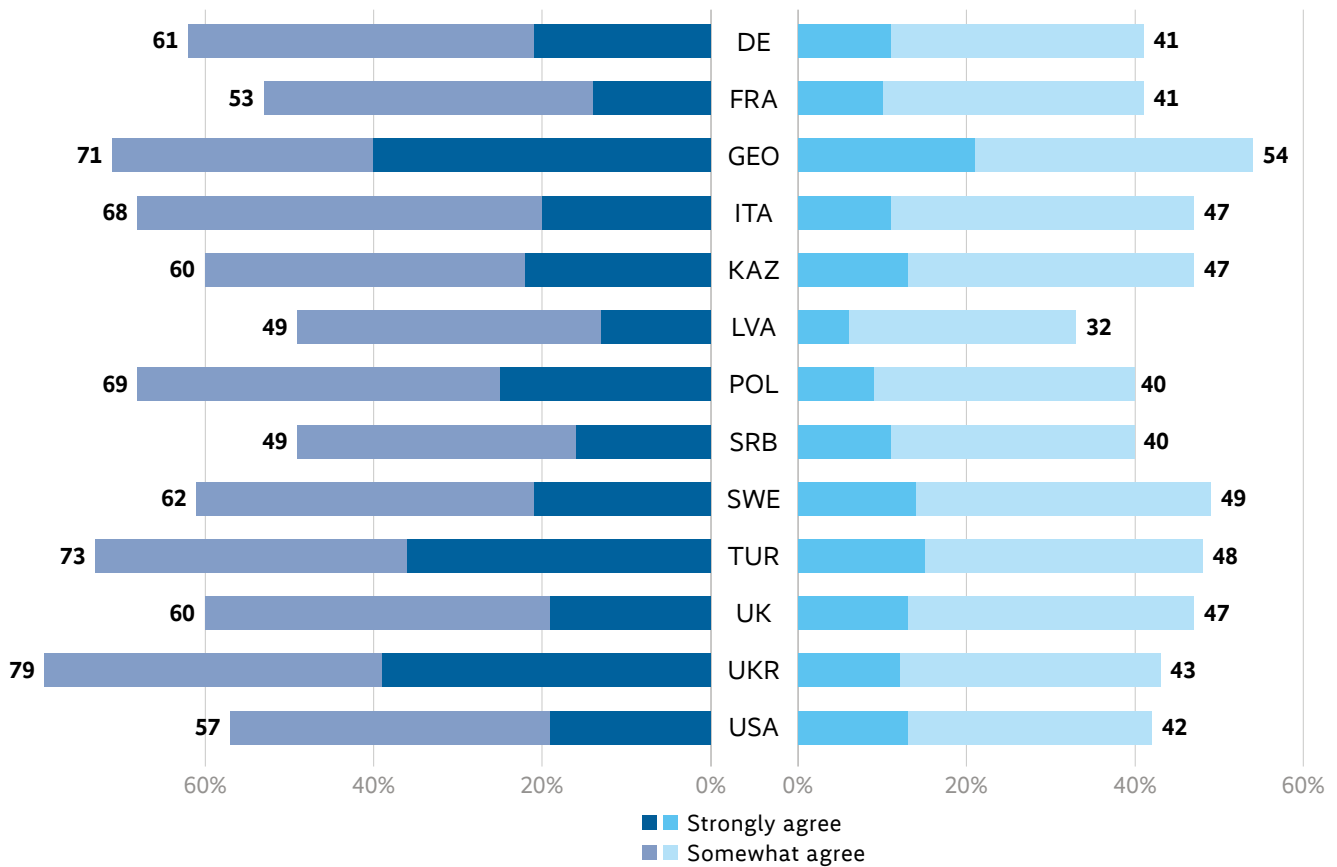
To what extent do you agree with the following statements?

All figures in %

'My country should **pursue an active foreign policy** and play a significant role in **solving international problems, crises and conflicts.**'



'My country should take **more international responsibility** and help other states, even if there are no direct benefits for my country.'



*The **OSCE** enjoys considerable support in countries in which it has been present with a mission.*

Third, the **Organization for Security and Cooperation in Europe** (OSCE) receives 49% approval for a bigger role in future. It is also the least known organisation, with high rates of 'I am not familiar with this organisation' responses, specifically in the US (30%), France and the UK (around 25% each). Support is particularly low among the permanent members of the UN Security Council, ranging from 36% in the United States to 48% in Russia, with France and the UK in between. The OSCE, however, enjoys considerable support in countries in which it has either been directly present with a mission or at least in the immediate neighbourhood, with over 50% support in Kazakhstan, Serbia, Türkiye and Ukraine. In particular, 63% of respondents in Ukraine support a stronger role for the OSCE, despite the linking of the organisation to the widely unpopular Minsk agreements.

*The highest **NATO** support is found in Ukraine, even higher than among NATO members.*

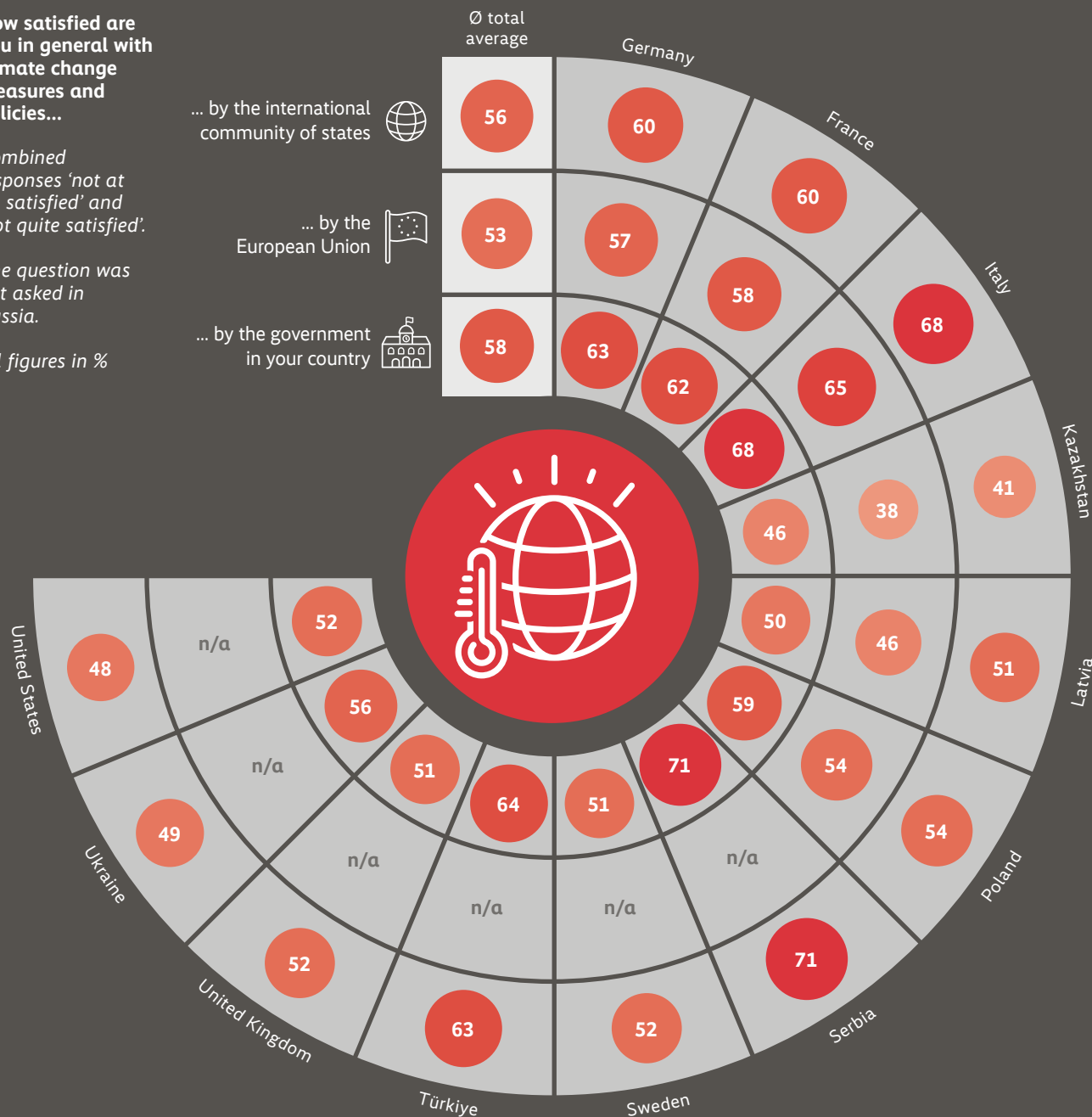
Fourth, approval for a bigger role for **NATO** stands at 47% on average. There are distinct differences in the sample, however. The highest approval, unsurprisingly, is found in Ukraine at over 77%. On the other end we find approval of just 9% in Serbia, even lower than the 14% in Russia. Among NATO members, support is lowest in Italy, at 39%, and highest in Poland, at over 76%. There is moderate support in the United Kingdom, Türkiye and the United States, where approval is just over 50%, with lower support in the other non-NATO countries surveyed.

How satisfied are you in general with climate change measures and policies...

Combined responses 'not at all satisfied' and 'not quite satisfied'.

The question was not asked in Russia.

All figures in %



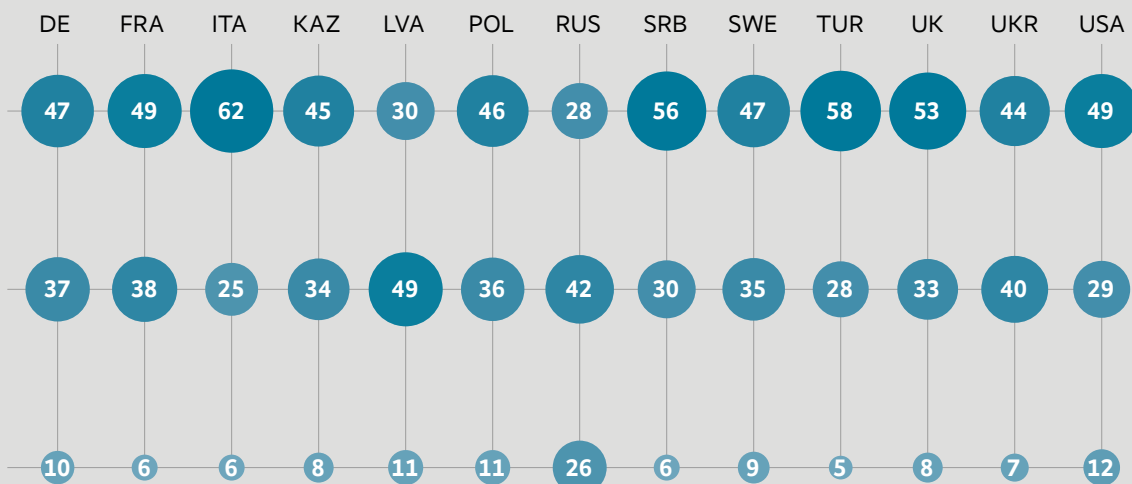
Taken together, what should people in your country do to respond to climate change?

All figures in %

We should do everything we can to stop climate change.

We should adapt to climate change, so that we can live well with a changed climate in the future.

We do not need to do anything, because climate change is not a big issue.

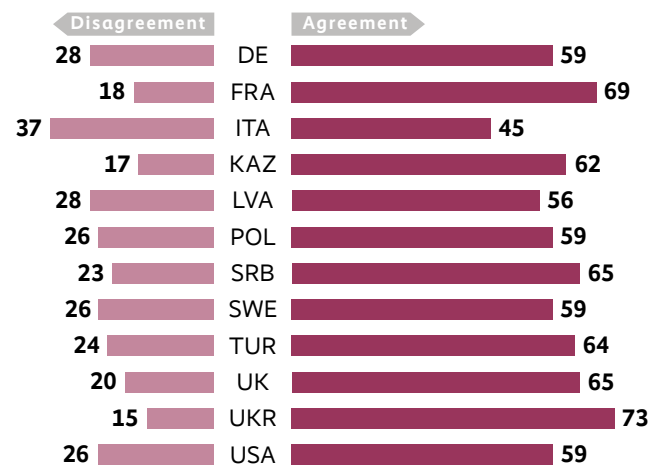


Deviations from 100% result from: 'don't know' and 'no response'.

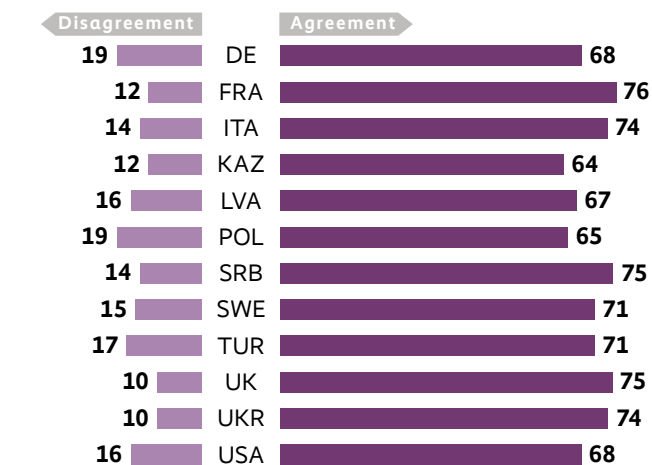
Attitudes to Climate Change

All figures in %

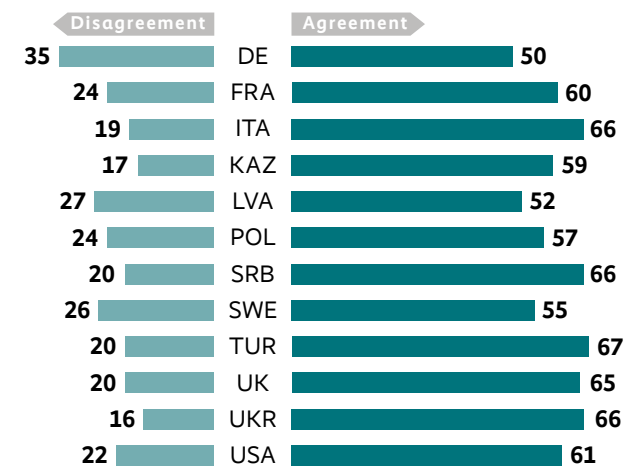
Climate change represents a challenge to global peace and security.



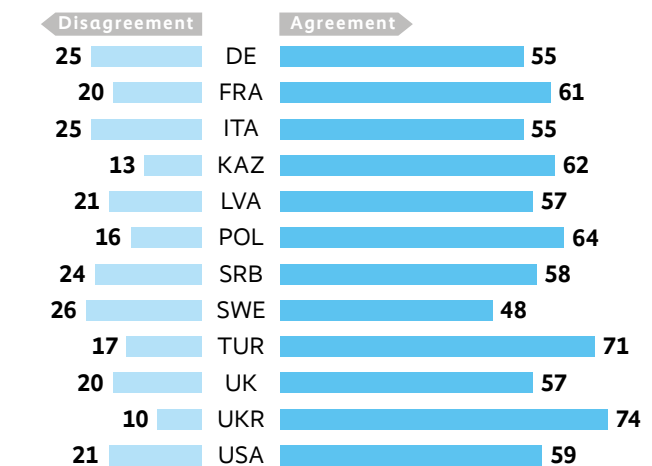
International collaboration is key to address global climate change beyond rivalries in other areas.



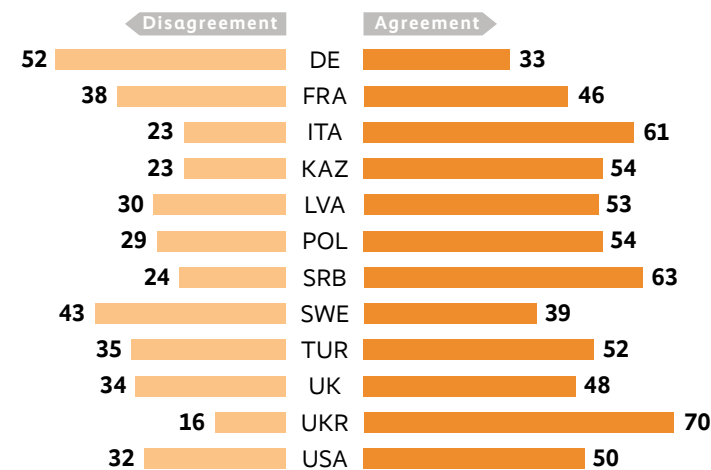
If my country acts early and decisively, climate change can be a unique opportunity to completely transform our lifestyles towards a fairer, healthier society.



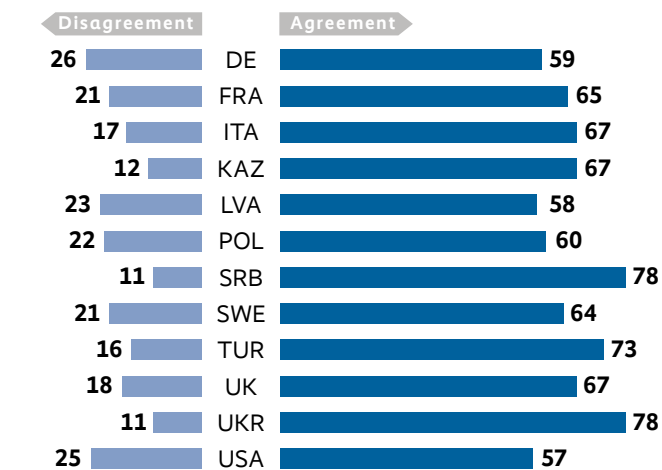
With climate change leading to instability, my country should prioritise securing its borders and competing in the global market for natural resources and new technologies.



I trust that investment in new technologies in my country can sufficiently tackle climate change.



Rich countries should protect poor and vulnerable countries from the impacts of climate change.



Deviations from 100% result from: 'don't know' and 'no response'.

Perceptions of climate change

International organisations are a means of dealing with global challenges. To obtain a fuller picture of international cooperation, we included a set of questions on climate change in the survey (not included in full in Georgia and Russia due to the length of the questionnaire). Climate change is widely recognised as a global threat, with concern spread evenly across age and gender. It ranks fourth out of nine foreign policy objectives, after terrorism and extremism, human rights abuses and geopolitical tensions and conflicts.

Northern and Central European countries are relatively less concerned regarding climate change than others.

Northern and central European countries are relatively less concerned than others, with Sweden, Latvia and Germany expressing the least concern (just above 60%). The US follows at 64%. Italy, Serbia, Türkiye, Georgia and France are the most concerned (76–80%). There is a consensus that current climate policies, whether at the national or the international level, are not sufficient to tackle the problem. Confidence in EU climate policy is, on average, a bit higher than in national and international efforts. Only 26% express satisfaction with government action, the lowest levels being in Serbia, followed by Ukraine and Italy. Satisfaction with EU efforts is slightly higher inside the Union, at 29%, with EU respondents less critical than with their respective governments. Globally, only 24% express satisfaction with the actions of the international community. We thus have a high level of concern and quite a low level of approval with the policies currently being implemented. Additionally, there is widespread recognition that climate change cannot be addressed in isolation. Broad majorities in all countries view international collaboration as key to addressing global climate change beyond rivalries in other areas.

Broad majorities in all countries view international collaboration as key to addressing global climate change.

Approaches to tackling climate change

The devil lies in the detail, however. A majority (47%) prioritise mitigation measures to stop climate change, such as reducing greenhouse gas emissions, compared to 35% who prefer to focus on adaptation measures to adjust to the current and future impacts of climate change. Exceptions to this trend are found in Latvia and Russia, where adaptation is favoured by a wide margin. In Russia, a worrying 26% believe no action is necessary, compared with only 8% on average in all other countries bar Georgia, where no climate-related questions were asked. The US has the second-highest rate, at 12%. While there is broad consensus that climate action is essential, the specifics vary. New technologies are not widely embraced as effective tools for combating climate change. However, in all countries except for Russia and Georgia, in which the detailed question was not asked, there is broad approval for prioritising the security of borders and competing in the global market for natural resources and new technologies (60%). This is almost as high as the approval for climate cooperation (71%).

This shows that public attitudes in this area also reflect the tension between isolationism and cooperation in addressing global challenges. A tendency to pursue one's own interests can also be detected, when respondents are asked about solidarity between rich and poor countries. When it comes to helping countries to cope with climate change, Germany, alongside the US and Latvia, stands out as one of the three nations least willing to assist vulnerable countries, in contrast to the high approval for such measures observed in non-EU countries, such as Kazakhstan, Serbia, Türkiye and Ukraine.

The securitisation of climate change has left its mark on public perceptions. People clearly see the need for cooperation. But people also seem unsettled and feel that international collaboration could mean losing out in a perceived zero-sum game, undermining their willingness to cooperate.



Country Profiles

Germany

France

Georgia

Italy

Kazakhstan

Latvia

Poland

Russia

Serbia

Sweden

Türkiye

Ukraine

United Kingdom

United States

Germany

[hedging and risk-averse]

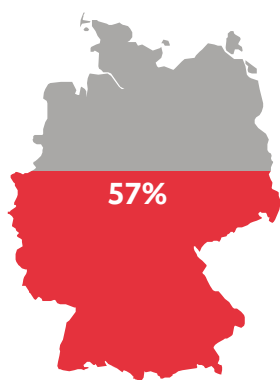
Germany, one of the leading EU member states, is navigating a complex mix of challenges. Historically cautious about embracing a dominant global role because of the legacy of Nazi rule and post-war division, the country has nonetheless grown more assertive in pursuing its political and economic interests. It increasingly acknowledges the need to contribute to peace and stability in Europe. However, Germany faces significant economic challenges that threaten its ability to maintain an influential economic position within the EU.

The collapse of the »traffic light« coalition, coinciding with Donald Trump's re-election, set the stage for early federal elections in February 2025. This development has introduced a period of uncertainty until the formation of a new government.

Self-perception

Germans' primary concerns are wars and conflicts (82%), inflation (79%) and international terrorism (76%). The proportion of respondents worried about uncontrolled immigration has grown from 61% in 2021 to 73% in 2024 and the level of concern increases with age, opening up a 27 percentage point difference between those aged 18–29 (56%) and 60–75 year olds (83%).

The dynamic of worries about one's personal future (2021: 57%, 2022: 71%, 2024: 66%) indicates a growing sense of instability after the outbreak of war and a subsequent stabilisation two years later. However, fears of a worsening personal economic situation have grown (2021: 43%, 2024: 50%).



Germany should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Germans rank among the most satisfied with their status on the international stage.

On the international stage, about 40% believe that Germany lacks the status it deserves, but Germans rank among the most satisfied with their standing in the survey. Nearly 60% of Germans, consistent with the previous survey and the poll average, believe their prosperity is linked to the well-being of other nations. However, this figure is relatively low for an export-dependent economy.

Perception of the world

Germany is an active participant in numerous international organisations, but this engagement is only partially reflected in public attitudes. Support for a larger role for the UN remains low, with only 48% in favour, significantly below the 61% survey average. Support remained steady for an expanded role for the EU (49%), for NATO (47%) and for the OSCE (47%).

Key pillars of German foreign policy include a commitment to the EU, with a majority of respondents (61%) supporting closer cooperation within the Union. However, opinion is split on whether there are conflicts between EU policies and Germany's interests (43% on each side). This is value up on 2021 (35%).

EU–US cooperation strengthened under the Biden administration, but collaboration with the US receives mixed support, with 46% in favour and 42% opposed. The results reflect hardly any increase compared with 2021 (51% in favour). The interests of the US and the EU are seen rather as aligned (47% do not think that their interests are contradictory).

52% of Germans perceive the media reporting as objective, one of the highest figures in the poll.

Since the onset of the full-scale war in Ukraine, Russia's image has changed significantly. It is now seen as Europe's biggest threat, with threat perception rising from 51% in 2021 to 73% today. Closer collaboration with Russia and China is widely rejected. Majorities support reducing ties with both countries, even at the cost of a lower standard of living (64% for Russia, 57% for China). Germany has also adopted a »derisking« approach towards China, now perceived as Europe's second-biggest threat (46%). Nearly 70% agree with reducing dependence on countries that do not share Germany's values.

The perceived divergences of interests between the US and Russia (63%) and the US and China (58%), are seen as most contradictory, higher than those between the EU and Russia (60%) or the EU and China (51%). The picture suggests that the US is viewed as acting within a more tense geopolitical context than the EU.

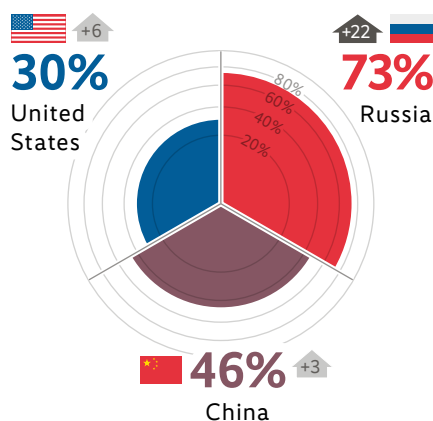
Germany's media is generally recognised as relatively objective, free and diverse. Indeed, it enjoys one of the highest levels of trust (52%) with regard to objective reporting among the surveyed nations, while only a smaller share (37%) perceive the German media as biased.

Perception of European security

Germans exhibit a defensive, risk-averse approach, reflected in their historically cautious policies in military affairs and emphasis on dialogue. The vast majority view the end of the war against Ukraine as crucial for improving European security.

This country is a threat to peace and security in Europe.

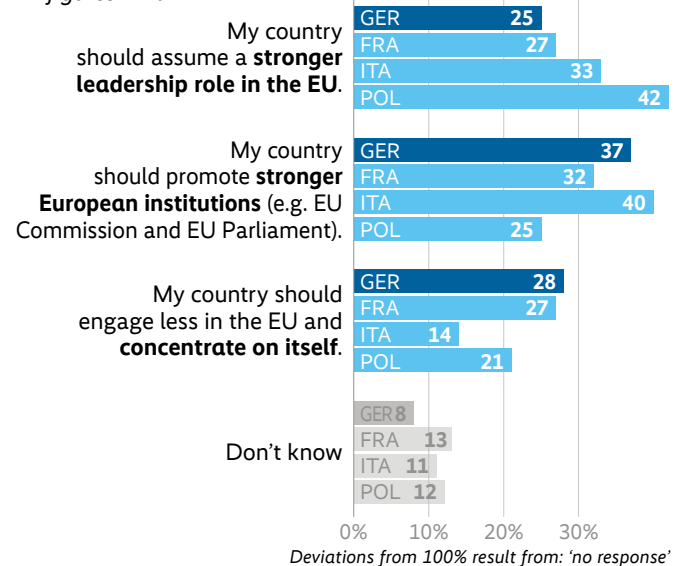
Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

Think of the role that your country currently has in the EU. What should be the course of action?

All figures in %



A large majority foresee an upcoming era marked by wars and conflicts, accompanied by »my country first« approach. Germans are increasingly worried about being directly affected by wars and conflicts in the future, with the proportion of those concerned rising from 47% in 2021 to 75% in 2024. The perceived risk of wars in Europe surged from 33% in 2021 to 56% in 2024. However, the perception of the likelihood of military confrontation between Russia and the West has declined in the course of the war against Ukraine, dropping from 48% in 2022 to 40% in 2024, below the average of polled European countries (48%). Additionally, 69% believe Germany could not defend itself against a Russian attack, a figure significantly higher than the NATO average of 53%. This is reflected in the stance of the Olaf Scholz government, which has been following a cautious path in supporting Ukraine with reference to potential Russian threats and the danger of escalation.

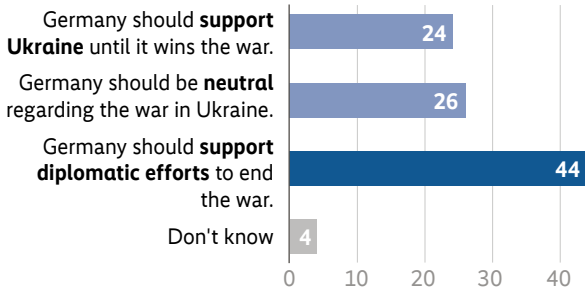
On security matters, Germans prioritise diplomacy (64%) over the build-up of an EU Army (49%). Some 57% believe that the EU would be unable to defend itself without US support. At the same time, 68% express a desire for more independence from the US. When asked about a potential leader in EU security, Germany is the only country in the Weimar triangle that is more likely to envision leadership alone (30%) rather than together with France and Poland (28%). Although cooperation between France and Germany remains essential, differences in defence, trade and energy policies are increasing.

Although Germans are the most confident in their country's ability to take on a leadership role in EU security, paradoxically, survey respondents express the highest support, compared with France, Italy and Poland, for Germany to engage less in the EU (28%, but only 18% among those aged 18–29).

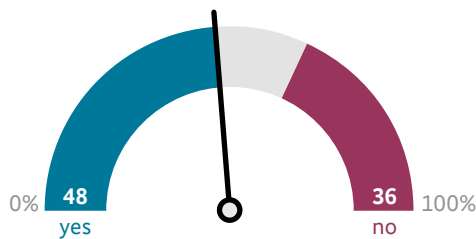
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Germany take in the war in Ukraine?

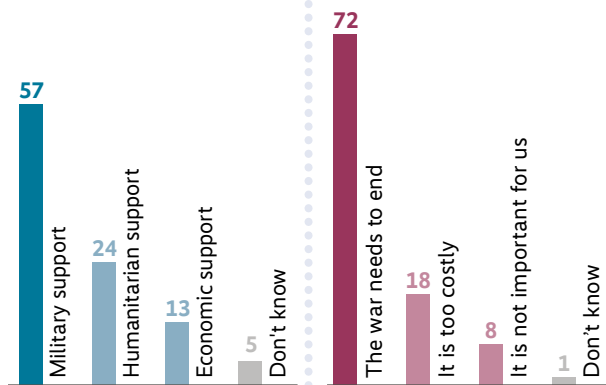


Do you think it is necessary to keep supporting Ukraine?



How should Ukraine be primarily supported?

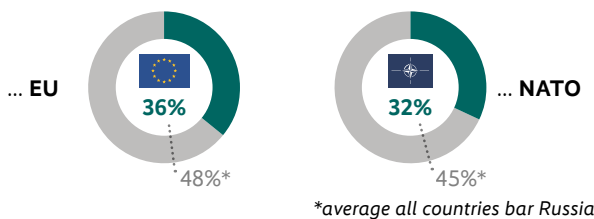
(Respondents who answered that Ukraine should be supported)



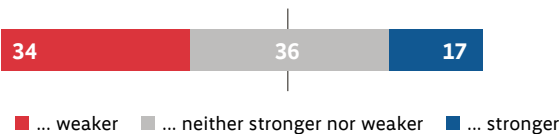
Why do you think Ukraine should not be supported?

(Respondents who answered that Ukraine should not be supported)

Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Germany? Did it become...



Germans are neither as strong supporters of Ukraine as Latvians or Swedes, nor as opposed as Italians. Instead, they remain cautious.

Their support for a stronger leadership role ranks lowest (25%). Germany's leadership position has diminished on the European stage due to internal divides in the governing coalition, a trend also reflected in the poll. However, the largest share (37%) would prefer to strengthen EU institutions.

Perception of the Russian war against Ukraine

A trend of disillusionment and war fatigue is evident. Some 46% believe that the war against Ukraine is not going to end within the next 12 months, the third-highest value among the surveyed countries.

Russia is overwhelmingly seen as the aggressor (70%), while Ukraine and the US are blamed by 20% each. In common with most EU member states, except Italy, 31% of respondents attribute Russia's invasion to its imperialist ambitions, while 28% cite long-standing tensions with Ukraine. Few respondents cite as a reason defence of Russia's interests or an attempt to act as a global player.

Germans are neither as strong supporters of Ukraine within the EU as Latvians or Swedes, nor as opposed as Italians. Instead, they remain cautious, with support declining since the 2022 survey, similar to France.

The highest share of German respondents (44%) favour diplomatic efforts. About a quarter support a neutral stance or backing Ukraine until victory, respectively. While 48% support continued assistance to Ukraine (below the EU average of 55%), 36% oppose further support. This is due mainly to a desire for the war to end (72%) or concerns about its cost (18%). A narrow majority (53%, higher than the NATO average of 44%) believe the war should end as soon as possible, even if it results in territorial losses for Ukraine. Only 27% support restoring Ukraine's territorial integrity, even if it is at the cost of prolonging the war.

Germany's historical military restraint is evident in its continued reluctance, on top of war fatigue among the population. The majority oppose further weapons deliveries (54%) and strongly reject sending troops (79%). Support for Ukraine's NATO membership (50% opposed, 32% in favour) and EU membership (49% opposed, 36% in favour) has declined since 2022. However, 53% now support expanding sanctions against Russia, up from 37% in 2021.

As broader effects of the war, NATO, the US and China are seen as largely unaffected, while Russia is perceived as weakened (33%). The EU and Germany are seen as either unaffected or weakened.

The way forward

There is a prevailing belief that global developments over the next five years will worsen, which has largely remained unchanged since the last survey: globally (69%), in Europe (59%) and in Germany (53%). This positions Germany, alongside France, as the two most pessimistic countries in the poll.

Germany, alongside France, ranks as the most pessimistic in the poll.

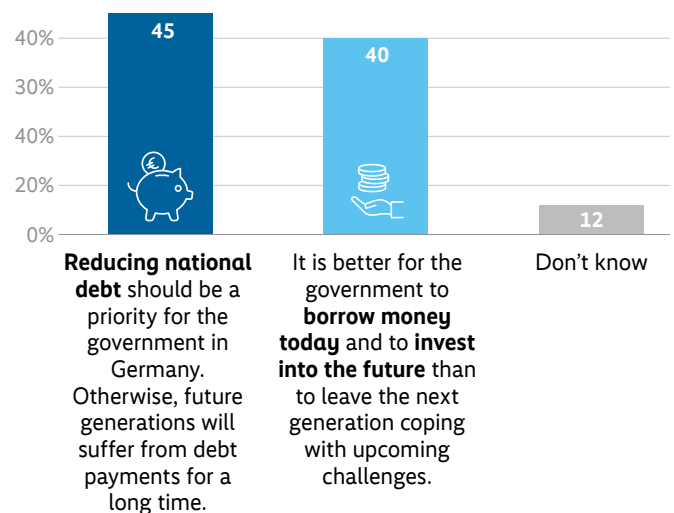
Foreign policy priorities include combating terrorism and extremism (62%, 2022: 42%) and international migration (44%, 18-29: 24%), and tackling climate change (43%).

There has been a clear inward turn in public sentiment. Since 2021, concerns about the decline in social cohesion have grown. Some 65% oppose promoting German values abroad, the highest figure in the poll. Nevertheless, 61% are in favour of pursuing an active foreign policy and playing a significant role in tackling international problems.

Internationally, Germans tend to believe that rules and laws in international relations remain relevant. Promoting peace is seen primarily in terms of diplomatic negotiations, considered the most effective and legitimate tool. Key methods include diplomacy (54%, 35% among 18-29 year-olds), disarmament initiatives and strengthening international organisations (about 30% each). Scepticism towards military interventions has risen sharply (from 56% in 2022 to 69% in 2024) and they are perceived as the least legitimate option. The majority oppose nuclear weapons, but 26% of 18-29 year-olds consider them a last resort, twice the 14-country average.

In your opinion, how should the German government deal with debts and investments?

All figures in %



Deviations from 100% result from 'no response'.

German respondents express general dissatisfaction with current climate policies, while the EU's measures receive the highest approval (32%, with 42% among those aged 18-29). A strong majority (68%) still believe that international collaboration is crucial. However, despite Germany's wealth, it shares with the US and Latvia the lowest support for protecting poor and vulnerable countries (59%).

Regarding the government's approach to new public borrowing and investments, a contentious issue in Germany since the »debt brake« was enshrined in the constitution in 2009, Germans are fairly divided: 45% oppose new debt for future investments, while 40% support it. Notably, support for new debt is lower among those under 40.

Support for increasing military spending is high, with 54% in favour, a 16% increase from 2021. However, 55% reject prioritising defence spending over social expenditures. The preferred method of financing defence is a special levy on the rich (47%), while 24% support cuts in other areas. New borrowing is supported by only 11%, which is the highest proportion in the poll.

Scepticism towards military interventions has risen sharply, from 56% in 2022 to almost 70% in 2024.

France

[pragmatic and disillusioned]

France, a nuclear power with a permanent seat on the UN Security Council, has historically been a major military and colonial force. For decades, the Franco-German duo was the main driver of the European Union, but more recently their leadership has slowly dissipated as a result of domestic developments in both countries. Nevertheless, President Emmanuel Macron still envisages a »sovereign Europe«, based on aspirations regarding a strategically autonomous EU capable of tackling complex challenges on an equal footing with other global players.

France is experiencing significant political instability following the ousting of Prime Minister Barnier in December 2024, the first successful no-confidence vote in over 60 years. This government crisis compounds existing challenges, including growing support for the right-wing Rassemblement National, and widespread protests over pension reforms and rising living costs. These factors have constrained President Macron, raising concerns about the emergence of a power vacuum.

Self-perception

The biggest concerns of French respondents are inflation and the rising cost of living (86%), economic crises (81%), and the impact of wars and conflicts (78%). A large majority (80%) feel safe in their immediate surroundings, but this is slightly below the average in the poll, probably because of recent riots and violent disturbances, as well as terrorist attacks in recent years. Although fears of a worsening personal economic situation have declined, the majority are concerned about their personal future (2022: 71%; 2024: 58%).

Perceptions of France's global standing have hardly shifted. Some 41% believe the country doesn't receive the status it deserves (2021: 45%). Still, the French are among the least dissatisfied with their country's status in our poll.

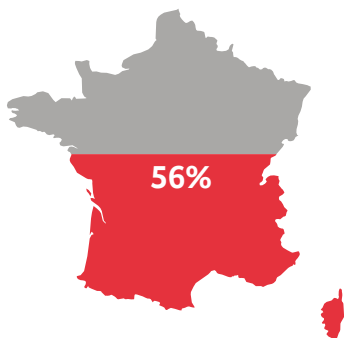
Perception of the world

French public opinion underscores the significance of multilateralism in global governance. France supports a greater UN role (60%), although this has declined slightly (2021: 64%). Public sentiment mirrors the French government's rather reserved stance towards NATO, with 48% supporting a greater role and 26% opposing it.

The French believe that the coming era will be marked by a »my country first« mentality (73%), although this is less pronounced among those under 40. A substantial 57% believe that laws and rules in international relations are no longer relevant, significantly more than in other polled European countries, such as Germany or Poland (both around 35%). Opinions about the likelihood of a new world war are split, with most people saying 'don't know' (40%) or 'yes' (31%).

57% of the French believe that laws and rules in international relations are no longer relevant, significantly more than in Germany or Poland.

French public opinion reflects a shift towards multipolarity. The French do believe the era of American supremacy is rather over (47%). While 44% still favour increased cooperation with the US, a notable 39% oppose it. A growing role for middle powers, such as Brazil or Türkiye, is expected by 45%, and 38% view Russia as a potential leader of the countries outside the »West«. Only a third view the EU as a global power. Nonetheless, the majority support a larger role for the EU, with opinion divided on the extent of France's disagreement with the EU. French respondents reject greater cooperation with Russia (65%) and China (54%), coupled with a desire for reduced dependence (67% for Russia, 62% for China).



France should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

44% of the French favour increased cooperation with the US, but **39%** oppose it.

The strengthening of alignment between the USA and the EU is evident from the French perspective, with the perceived divergence of interests at 29%. In contrast, the perceived divergence between the US and Russia (60%) or China (56%) remains higher than that between the EU and Russia (55%) or China (49%). These perceptions suggest that the US is positioned within a more complex and tension-filled geopolitical context than the EU.

Over 50% of French people do not find media coverage objective, consistent with previous years. This perception may be driven by the fact that the media landscape is owned by a small group of billionaires.

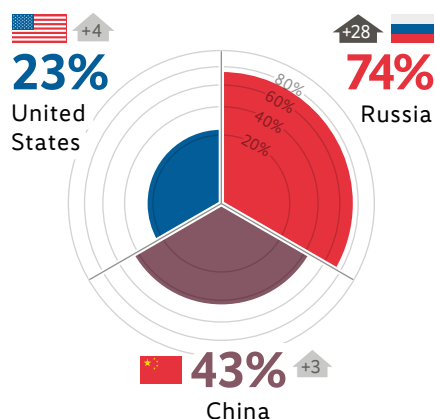
Perception of European security

A large majority in France see an era of wars and conflicts emerging, with 74% seeing Russia as a threat for Europe and 43% China. The US is viewed as a threat for European security by 23%.

A majority, as in other polled countries, view ending the war against Ukraine as key to improving European security. About half see the EU as unable to defend itself without the US. An overwhelming majority of 78% see France as vulnerable in case of a Russian attack. This is the highest figure in the poll, despite France's history as a military power and its battle-tested deployments. Disillusionment with interventionism is growing, with opposition to military interventions increasing from 37% in 2021 to 61% in 2024. Also, military interventions are perceived as less effective (2021: 50%, 2024: 41%) and less legitimate (2021: 48%, 2024: 37%).

This country is a threat to peace and security in Europe.

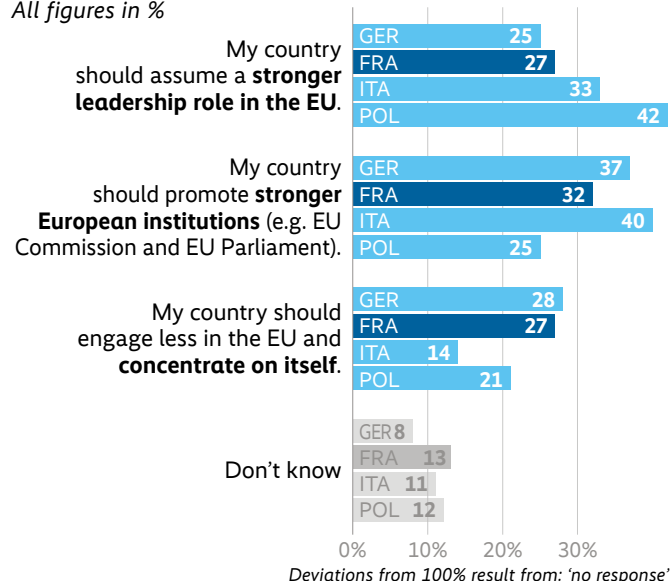
Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

Think of the role that your country currently has in the EU. What should be the course of action?

All figures in %



Reflecting Macron's (futile) efforts to promote European strategic autonomy, France shows the highest support among European countries for an EU Army (56%). Paris advocates a unified EU foreign policy and a European Defence Fund. This position helps to explain its desire to become more independent of the US, with 64% in support, slightly higher than the average across the surveyed EU countries. Still, almost half believe that defence should be handled nationally.

Asked about a potential leader in EU security, 29% name France either alone or as part of the revived Weimar triangle, together with Germany and Poland. While France and Germany's cooperation remains key, differences in defence, trade and energy policies are growing. In any case, France is nearly equally divided on its future role in the EU: 32% favour promoting stronger European institutions, 27% support taking stronger EU leadership, while 27% favour focusing on national interests. Divergent EU priorities are emerging, with Germany envisioning a similar role, Poland seeking a more prominent leadership position, and Italy focusing on strengthening European institutions.

Perception of the Russian war against Ukraine

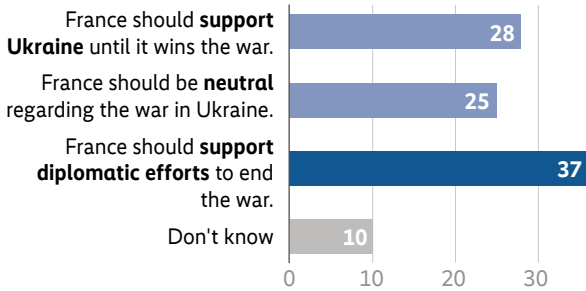
In France, 72% of respondents identify Russia as the primary aggressor in the war. Regarding motives for Russia's invasion, 32% attribute it to Russia's imperialist ambitions, while 27% cite the long-standing tensions with Ukraine.

Concerning France's stance, the highest share (37%) favours diplomatic efforts, despite Macron's unsuccessful efforts to mediate between Russia and Ukraine. Some 28% back supporting Ukraine until victory, with stronger support among older respondents.

War against Ukraine

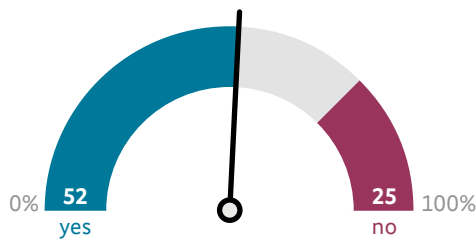
All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should France take in the war in Ukraine?



Opposition to military interventions increased from 37% in 2021 to 61% in 2024. But France shows the highest support among European countries for an EU Army.

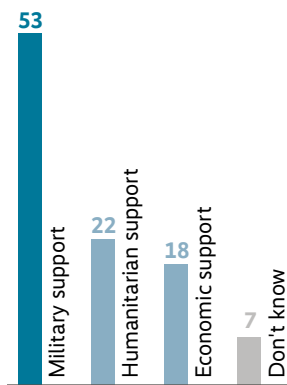
Do you think it is necessary to keep supporting Ukraine?



The gap between the desired outcome and its perceived feasibility is highlighted, as only 5% of respondents anticipate a military victory for Ukraine.

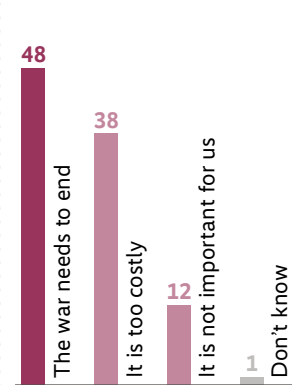
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine should be supported)



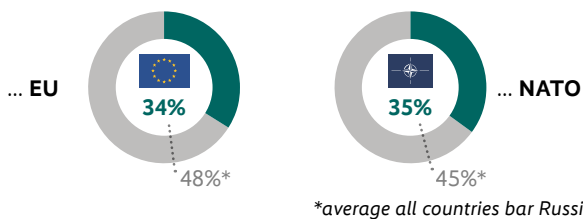
Why do you think Ukraine should not be supported?

(Respondents who answered that Ukraine should not be supported)



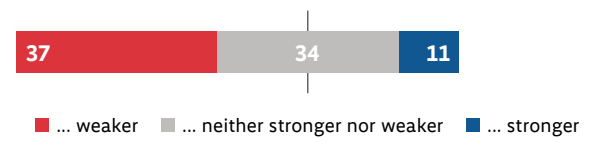
Overall, about half favour continued support for Ukraine. Among those, 53% back military and 22% humanitarian aid. Among those opposed to further aid, 48% believe the war must end, and 38% claim that it's too expensive, the second-highest share after Poland. A majority would welcome more sanctions, while only around a third support increased weapon deliveries, a notable decline (2022: 40%).

Should Ukraine become a member of...?



Macron's suggestion of deploying ground troops in Ukraine faced widespread criticism, as reflected in our survey, with only 14% in favour. French opinion on possible EU and NATO membership for Ukraine is mixed, but rather negative. This stance became apparent as early as 2008, when Merkel and Sarkozy opposed Ukraine's Membership Action Plan at the NATO Bucharest summit, leading to the alliance's decision to withhold support for Ukraine's NATO membership. This historical position is now intertwined with war fatigue. The French are neither as strong supporters as the Latvians or Swedes, nor as opposed as the Italians. Support exists, similar to that in Germany, but it remains cautious and has waned compared with the 2022 survey.

What effect, if any, does Russia's war against Ukraine have on France? Did it become...



As for the broader effects of the war, French respondents largely view it as aimed at expanding Russia's territory, slightly higher than the average of polled NATO countries. As a result of the war, the US, China and NATO are perceived as stable. Russia and the EU are regarded as having diminished influence. France is viewed as marginally weaker.

The way forward

There is a prevailing belief that developments over the next five years will worsen: globally (69%), in Europe (56%) and in France (55%).

This places France, together with Germany, as the most pessimistic country in the poll, although the younger generations have a slightly more optimistic outlook.

The top foreign policy objectives are combating terrorism and extremism (54%, higher among older respondents), tackling climate change (44%) and addressing human rights violations (37%). While 49% support all possible measures to combat climate change, 38% emphasise adaptation. President Macron emphasises France's potential for climate leadership, but dissatisfaction with climate policies is widespread. Still, France and Italy remain the most satisfied with EU climate policies in the poll. Many view climate change actions as an opportunity for transformation, but also as a source of protectionism amid uncertainties.

Almost half of French respondents oppose promoting values abroad, while 35% agree. The value-centred approach demonstrates the strongest reluctance to cooperate with countries with different values, even if they contribute to peace and security. With regard to conflict resolution, diplomacy is seen as the most effective and legitimate measure. Some 42% view intensifying diplomatic efforts as an

France, together with Germany, is the most pessimistic country, though younger generations are more hopeful.

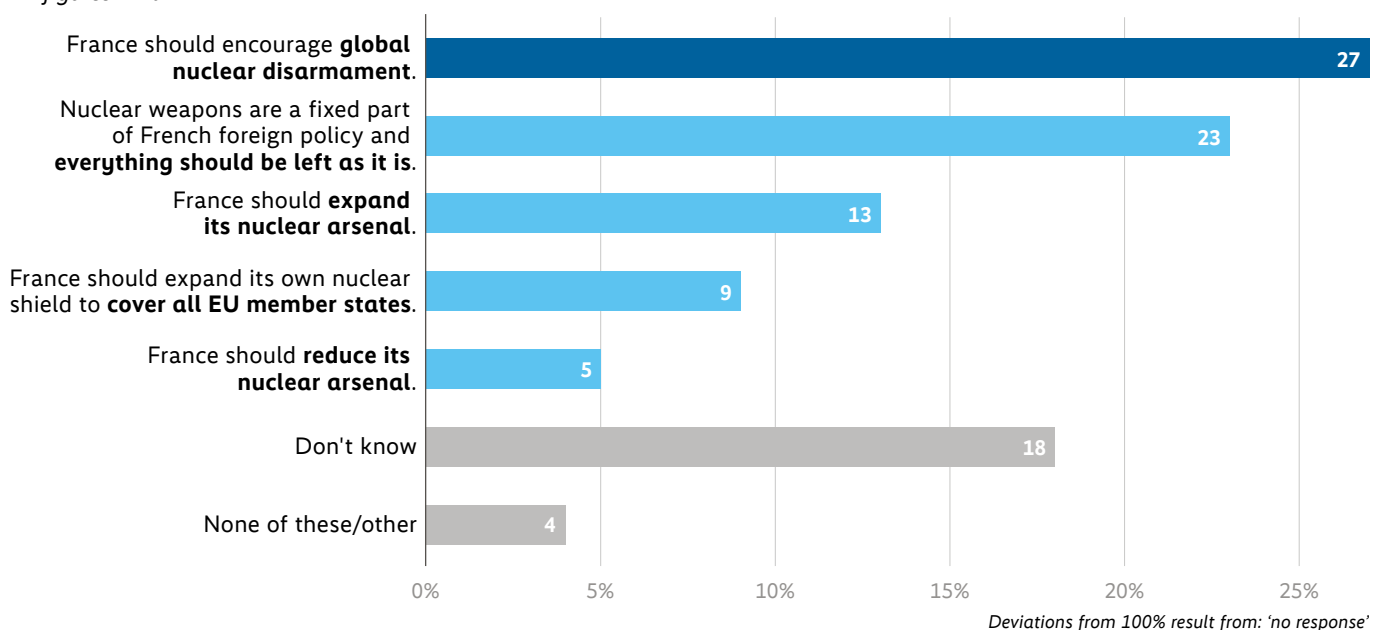
important priority. Development aid receives the least support (22%), even though it should remain important due to France's colonial past.

A majority are deeply concerned about the potential for nuclear escalation. Some 27% of French respondents support global nuclear disarmament, but 23% view nuclear weapons as central to their foreign policy. While 63% oppose their use, the third-lowest figure after Russia and the US, 27% support deploying them as a last resort, a worryingly high proportion.

Public opinion on military spending has shifted due to the ongoing war. Support for a higher military budget has risen from 45% in 2021 to 52% in 2024. Still, about half favour spending on economic and social affairs over defence, with only 25% the other way round. A narrow majority (44%) favour a special levy on the rich, while 28% favour cuts in other budgets. Only 5% support increased borrowing for defence spending. However, France has significantly increased its debt, reaching historically high levels that surpass the European Union's fiscal thresholds, putting it among the countries with the highest debt-to-GDP ratios in the EU.

Thinking of the French defence policy, what role do you think nuclear weapons should have in the near future?

All figures in %



Georgia

[forward-looking and balancing]

Georgia has a complex blend of influences from both Europe and Asia. Since gaining its independence from the Soviet Union in 1991, Georgia has pursued closer ties with Western institutions, including aspirations to join NATO and the European Union, while maintaining relations with Russia. In 2008, escalating tensions erupted into a five-day war, after which Russia recognised the separatist regions of Abkhazia and South Ossetia. The conflict ended with an EU-brokered ceasefire agreement.

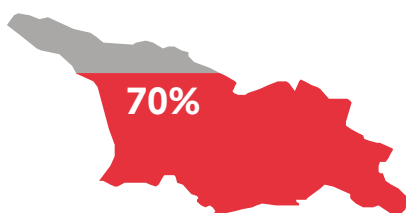
Taking a broader view, geopolitical influences from both Russia and the European Union are crucial in shaping Georgia's fortunes. Georgia has strengthened its Western alignment, signing an Association Agreement with the EU in 2014 and applying for EU membership in March 2022, a move accelerated by Russia's invasion of Ukraine. The path towards Europe has become the main domestic conflict in late 2024, however.

Self-perception

Georgians feel most secure in their immediate surroundings compared with other countries (93%). This feeling of security is accompanied by the second-lowest level of concern regarding a decline in personal economic situation (40%).

Some 90% of Georgians are concerned, along with Turks and Ukrainians, about inflation, the cost of living and economic crises. This mood is also influenced by high unemployment (youth unemployment stands at 30%) and widespread informal employment. These components collectively account for the observed outcome that 86% express concerns about their personal future, the second-highest level in the poll after Ukraine.

Georgians are conscious of global interdependencies, and 79% feel that Georgia's well-being is linked to positive developments in other countries. However, 68% feel that Georgia does not receive the status it deserves, 13% higher than the poll average.



Georgia should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Perception of the world

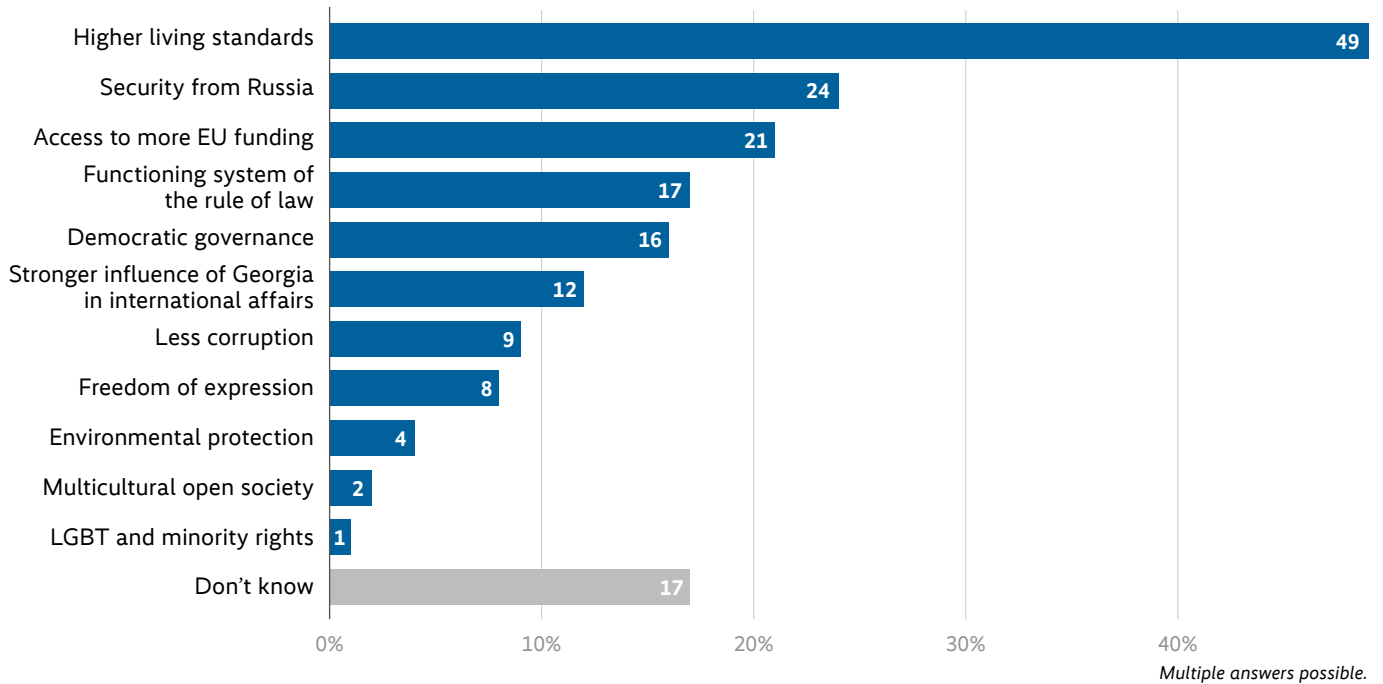
Their prevailing sentiment is that an era of a »my country first« is dawning. Georgians still very much believe in the Western-dominated security order, having the lowest rate of agreement that the era of American supremacy is over (28%). They also have the third-highest approval that Europe is becoming a global power (44%). Among 18–29 year olds, this percentage rises to nearly 60%. Georgians are least convinced that middle powers such as Türkiye or Brazil are emerging as new centres of influence. In contrast to Russian respondents, Georgians show the lowest agreement that laws and rules are no longer relevant.

*Georgians believe in the Western-dominated security order: **44%** think that Europe is becoming a global power and only **28%** agree that the era of American supremacy is over.*

The overwhelming majority in Georgia prefer stronger cooperation with the EU (85%), the highest support in the poll, next to Ukraine. At the same time, opinion is split on whether EU politics are regularly in conflict with the interests of Georgia (43% each agreeing and disagreeing). EU membership has been supported by a majority of Georgians for many years. When asked about the reasons for EU membership, most people choose higher living standards (49%). They also cite EU funding, as well as security from Russia. Diving deeper into the findings suggests that young Georgians are more pro-Western, particularly in terms of foreign policy and international alliances. This generational shift could have significant implications for Georgia's future direction, possibly with regard to closer ties with the EU. Georgia's relations with the EU soured after controversial laws were introduced in 2024 curbing LGBTQ+ rights and targeting foreign-funded civil society groups.

What do you see as the most compelling reasons for Georgia to join the EU?

All figures in %



Young Georgians are more pro-Western than older generations.

The EU paused its accession process, and the internal Georgian conflict about the European perspective has intensified since.

However, an either-or framing oversimplifies the situation. An absolute majority of Georgians (58%) support a balanced approach between the EU and Russia, rather than aligning with one side at the cost of deteriorating relations with the other. Nonetheless, 43% of polled Georgians desire more cooperation with Russia (50% oppose closer ties), although only a quarter of those aged 18–29 support this. At the same time, there is also a wish to reduce reliance on Russia, even if it has a negative impact on living standards in Georgia (58%).

Outside the narrow Russia-versus-the-West framing, Georgians support enhanced cooperation – 76% with the USA and 60% with China. At the same time, they want to reduce dependency on China (51%). In contrast to Ukraine, they show relatively low support for reducing dependency on non-like-minded states, which reflects a distinctive and pragmatic stance on this issue.

Perception of the Russian war against Ukraine

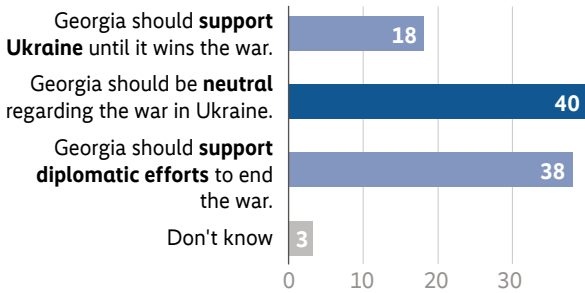
Georgians suffered from Russian aggression in the 2008 five-day war. Afterward, Russia recognised the separatist regions of Abkhazia and South Ossetia. These became more dependent on Moscow. Russia continues to maintain bases and troops there. Against this backdrop, Georgians avoid taking a strong position on the war against Ukraine. Instead, they favour a neutral stance (40%), the highest endorsement for that in the poll, and support diplomatic efforts to end the war (38%). A majority (58%) hold Russia responsible for the ongoing war, while 33% point to the US and 24% to Ukraine. Notably, among younger people perceptions of responsibility on the part of both Russia and Ukraine are higher, while blame toward the US is lower.

Moreover, the war is mostly (42%) perceived as a proxy war between the West and Russia. This stance is shared only in Serbia and Türkiye. Some 36% view the war as an attempt by Russia to expand its territory. This perception is even more pronounced among those aged 18 to 29 (43%). Notably, it is lower than in western European nations such as France, the UK and Sweden, where it exceeds 60%. Less than 5% lean towards the third characterisation, namely that it is a war between democracies and autocracies.

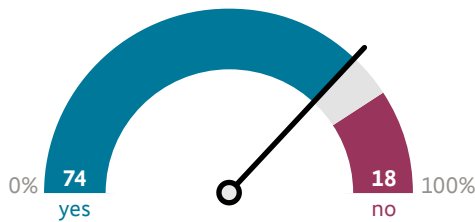
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Georgia take in the war in Ukraine?

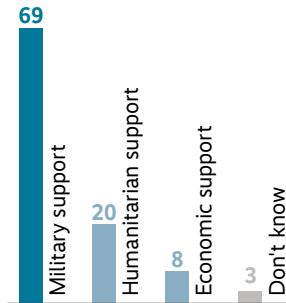


Do you think it is necessary to keep supporting Ukraine?



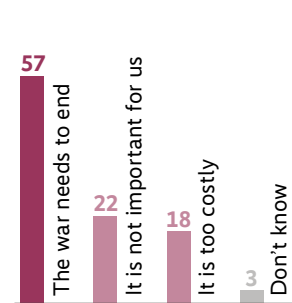
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine should be supported)

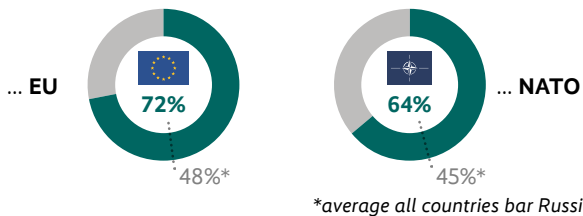


Why do you think Ukraine should not be supported?

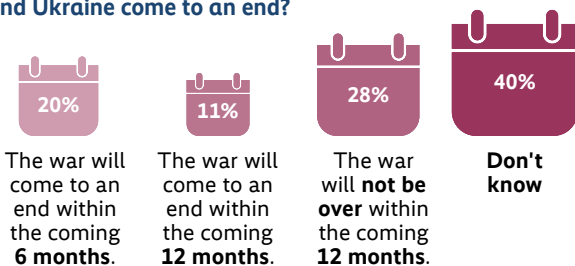
(Respondents who answered that Ukraine should not be supported)



Should Ukraine become a member of...?



When will the war between Russia and Ukraine come to an end?



58% support a balanced approach between the EU and Russia, rather than aligning with one side at the cost of deteriorating relations with the other.

However, the geographical proximity to Russia is reflected in the fact that most people are worried about nuclear escalation (76%). This is not surprising given Russia's recent nuclear exercises and threats to use nuclear weapons.

The Georgian government maintains a neutral, possibly defensive stance. Still, a large majority (74%) advocate continued support for Ukraine, the second highest in the poll. Georgian respondents are the strongest proponents of humanitarian assistance. Accordingly, they reject the idea of sending troops, the second-highest level in the poll. When it comes to increased weapon deliveries, people are also sceptical, but women support this slightly more than men (23% vs 18%). Georgians support Ukraine becoming an EU member (72%) and a NATO member (64%).

Regarding an end of the war, Georgians express more optimism for a diplomatic solution than people in any other polled country (48%). This might stem from experience with a ceasefire in their own country, which was brokered by the EU in 2008. The ceasefire neither settled the conflict nor returned occupied territories, but it stopped the fighting and safeguarded Georgia's independence.

The way forward

Georgia's further course is dependent largely on internal political developments. The contested October 2024 parliamentary elections in Georgia drew international attention amid allegations of fraud and irregularities. The ruling Georgian Dream party secured a fourth consecutive term. This sparked protests in Tbilisi, demanding new elections. Many see the unrest as part of a broader geopolitical struggle between Russia and the West. Still, Georgians express the most optimistic views in the poll about developments regarding peace and security over the next five years – in Georgia, Europe and globally. Women are overall more positive.

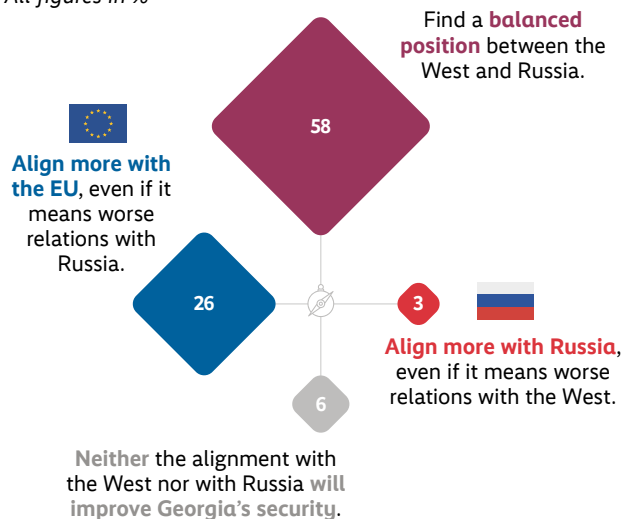
Georgia seeks to play a more engaged role, with nearly 71% supporting a proactive foreign policy to address international problems, crises and conflicts. They show the highest levels of agreement to take on more international responsibility and to cooperate with any country if it is conducive to peace. Foreign policy priorities should include concerns about human rights violations (36%), geopolitical tensions (33%) and fighting terrorism and extremism (25%), while trade wars and global inequality play a minor role.

However, Georgia's commitment to international responsibility is somewhat limited: almost 70% indicate that Georgia should focus on its own well-being and avoid international involvement. Only 20% are in favour of military interventions in conflicts. Together with Ukraine, united by the Russian aggression, they have the highest approval rate for increasing military spending (77%). However, about two-thirds (67% women, 59% men) prioritise economic and social over defence spending. Notably, among 18–29 year olds, 34% support prioritising military spending, compared with a total of 24%.

Georgians express more optimism for a diplomatic solution in the war against Ukraine than people in any other polled country.

In your opinion, how should Georgia position itself regarding Russia and the West to improve its security?

All figures in %



Deviations from 100% result from: 'Don't know / No response'

Italy

[conflict-averse and diplomatic]

Strategically located in the Mediterranean, Italy is a founding member of both NATO and the European Union. Its post-war recovery was driven by a strong commitment to multilateralism, and today it plays a key role in Europe politically, economically, militarily and culturally. Despite being the third-largest economy in the Eurozone, it was hit particularly hard by the 2008 financial crisis and the Covid-19 pandemic, exacerbating the divide between the richer North and the poorer South.

In 2022, Giorgia Meloni's election marked a shift toward right-wing policies. While her government has positioned itself officially as pro-European, it has also adopted critical views on the EU and called for constitutional changes. These moves signal a shift towards a stronger nationalistic approach, contrasting with Italy's traditional democratic and multilateral values.

Italians prioritise peaceful cooperation more than other polled EU and NATO countries. Italy is more restrained in military spending and interventions, not due to idealism but because of a commitment to peace and non-violence, despite shared security concerns.

Self-perception

A majority of 69% are concerned about their future. Italians' biggest concerns are wars and conflicts, inflation and economic crises (over 80%). Uncontrolled migration (with 63%) ranks low, despite Meloni's pivotal role in shaping Europe's migration agenda.

Italy's status dissatisfaction (63%) has improved slightly since the survey in 2021 (68%). But it still remains among the EU's highest, alongside Poland. Only 34% believe that the current government has improved Italy's international reputation. Some 64% view Italy's prosperity as linked to the well-being of other countries, similar to other polled EU countries.



Italy should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Perception of the world

Italy's rightward shift has led to an ambivalent strategy: pragmatic and opportunistic. Despite Meloni's Eurosceptic roots, she balances nationalist priorities with increased influence in European decision-making.

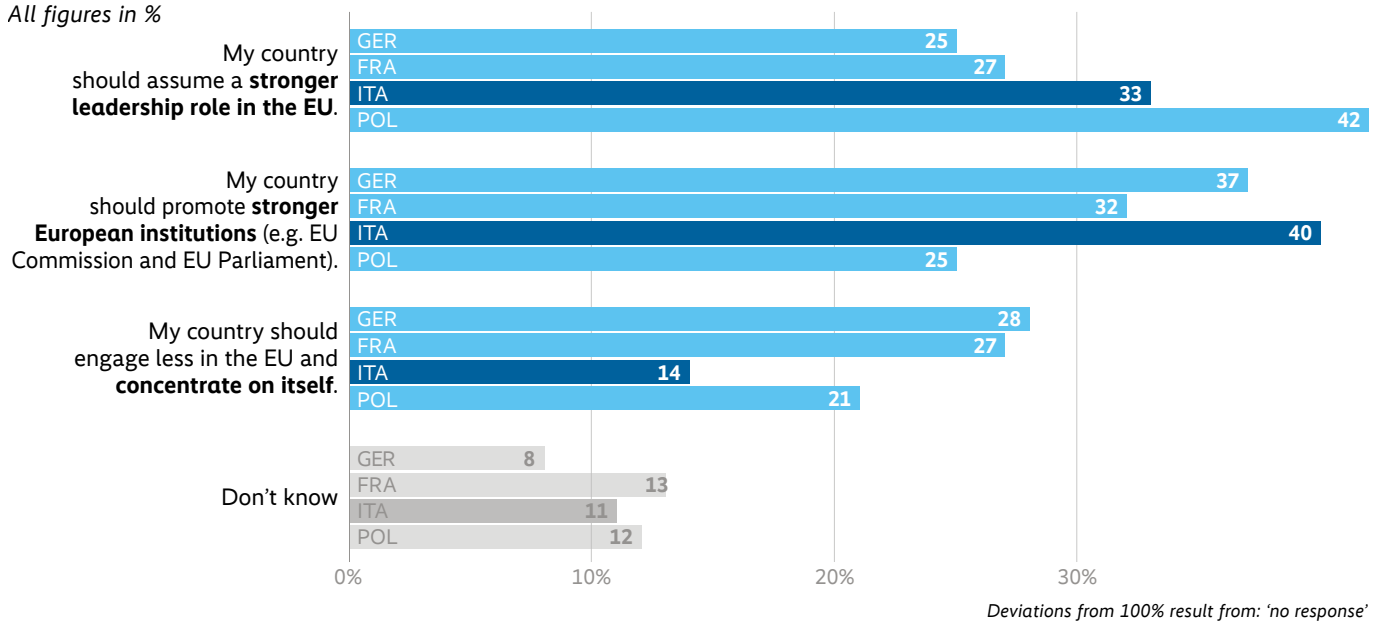
Italians reveal mixed sentiments about the EU's role and Italy's position within it. Italian respondents are least likely to believe that the EU will emerge as a major global power (33%). However, regarding Italy's current role and future course of action in the EU, 40% believe it is Italy's duty to strengthen European institutions, the highest value among polled countries (Poland, France and Germany). Additionally, 33% support a stronger EU leadership role, second only to Poland. Only 14% favour less EU engagement, lower than Germany (28%) and France (27%). At the same time, Italian public opinion shows growing ambivalence. Although the EU is the most valued organisation (63%), support for deeper cooperation has declined, and concerns over internal conflicts have risen (67%, above the EU average). Italians remain committed to European integration but are wary of the EU's cohesion and global influence.

Italians show commitment to international institutions, as support for the OSCE has risen to 52%, reflecting a desire for peace. Italians are divided on NATO, with 43% opposing a bigger role, particularly among older generations, and 39% favouring it. Support for cooperating with Russia dropped from 45% in 2021 to 26%, and for the US from 54% to 43%, and remained stable in relation to China.

Italy demonstrates a strong sense of pragmatism, adapting to benefit itself while avoiding taking sides.

Think of the role that your country currently has in the EU. What should be the course of action?

All figures in %



Nearly half disagree that the EU and the US have contradictory interests. Italians perceive a notable contradiction with regard to US–Russia relations (59%). Italy has one of the lowest perceptions of EU–Russia contradictions (50%) and the highest support among EU countries (64%) for co-operation with non-like-minded countries if it promotes peace and security. Some 61% support less dependence on Russia, 53% on China.

Media reporting is seen as lacking objectivity (54%); only 29% consider it objective. Nevertheless, concerns over press freedom have risen due to government control plans.

Perception of European security

Italians advocate for peace and have a relatively subdued perception of threats. Italians foresee an emerging era of wars and conflicts but they do not appear to be too worried by recent events, as a new world war or a direct military confrontation between Russia and the West is not widely perceived as likely.

Russia is identified as the greatest threat for Europe, with concerns rising sharply from 36% in 2021 to 67% in 2024. Unlike in other NATO countries, concerns about the US as a threat have grown from 21% to 35%. This places the US nearly on a par with China (37%).

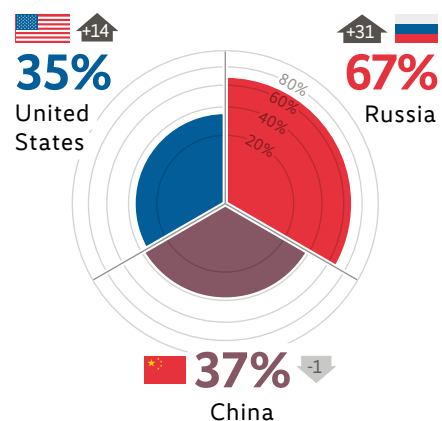
Changes in the security situation are regarded with scepticism. NATO enlargement is seen as a major threat by 52%, higher than in other NATO countries, while 45% express concerns about EU enlargement towards the East.

Only about a third believe Italy should increase support for the EU-accession of Western Balkans countries.

Only a third see defence as an EU responsibility, and approval for a European Army ranks at 42%, a low figure compared with other EU members. Only 17% favour military interventions. Half believe the EU can't defend itself without the US. Some 57% doubt Italy's ability to defend against a Russian attack, below the European average. As a leader in EU security, most respondents favour Germany (21%) or joint leadership by Germany, France and Poland (14%). Over two-thirds of Italians desire ensuring international peace through other means, such as diplomacy, an expression of multilateralism.

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.

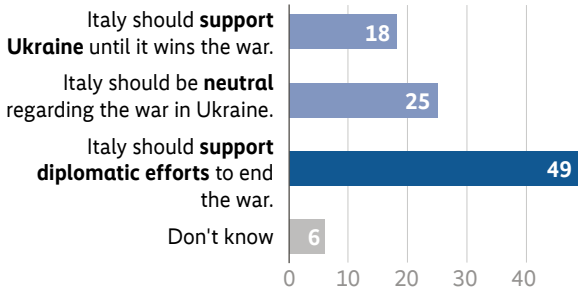


Combined responses 'strongly agree' and 'somewhat agree'

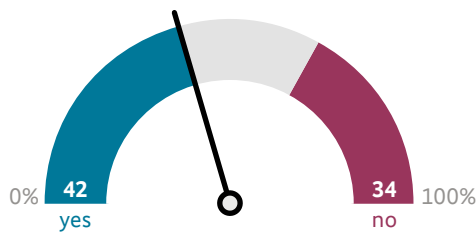
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Italy take in the war in Ukraine?

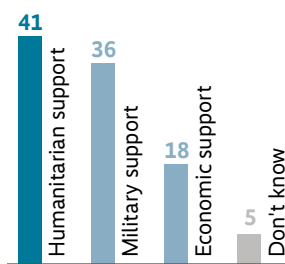


Do you think it is necessary to keep supporting Ukraine?



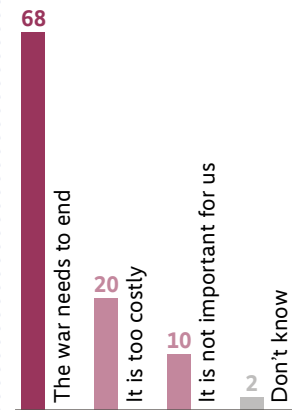
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine should be supported)

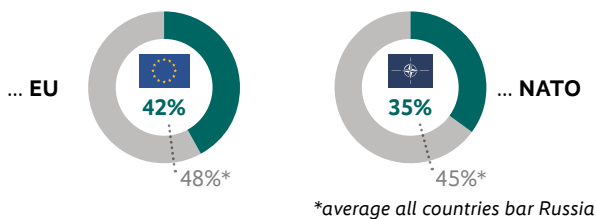


Why do you think Ukraine should not be supported?

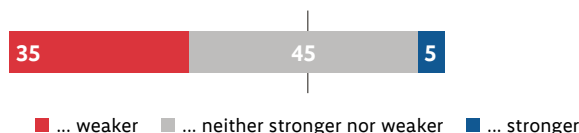
(Respondents who answered that Ukraine should not be supported)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Italy? Did it become...



Only 18% of Italians back supporting Ukraine until it wins the war – in contrast to 50% in Latvia or Sweden.

Perception of the Russian war against Ukraine

Italy's defensive, peace-oriented approach contrasts with the more assertive stances of Sweden and Poland. Under Meloni, Italy supports NATO and EU measures against Russia but is among the least enthusiastic EU supporters of Ukraine.

Over 70% see an end to the war as a precondition for peace in Europe and express concern that it will impact Italy's future. Only 64% hold Russia accountable, lower than most EU countries, and nearly half see the war as expanding Russian territory, below EU and NATO averages.

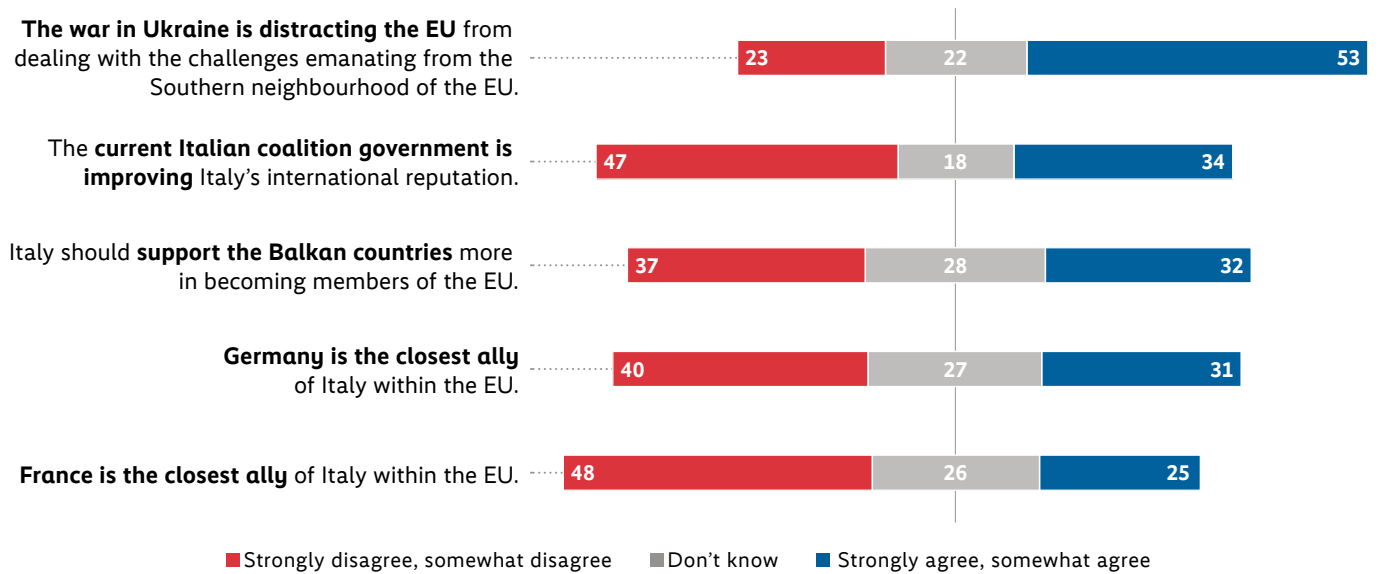
Some 68% of opponents of increasing Ukraine's support believe that ending the war is crucial. Only 18% back supporting Ukraine until it wins the war, by far the lowest value of all EU countries (in Sweden and Latvia: around 50%). A notable 19% of Italians, double the rate in Sweden or Poland, believe Russia might prevail on the battlefield. War fatigue, particularly among older generations, contributes to a willingness to consider territorial concessions for peace. Additionally, 53% of Italians believe the EU is shifting its focus away from challenges in the southern neighbourhood.

Regarding Italy's position on the war against Ukraine, 49% favour diplomatic efforts to end the war, 25% support neutrality. Just over half support more sanctions. Italians are more sceptical than other EU nations about Ukraine joining the EU (42% in favour) and NATO (35% in favour). Only 42% of Italians support further aid to Ukraine, while 34% oppose it. Unlike the trends towards strengthening the military in most NATO countries, half of Italians favour humanitarian aid, followed by military support. Accordingly, 42% oppose third-country intervention.

The EU is most affected by the war, with 37% of Italians perceiving it as unchanged and 36% as weaker. Some 26% believe Russia has gained in strength. Italy is seen as unchanged by 45%.

To what extent do you agree with the following statements?

All figures in %



Deviations from 100% result from: 'no response'

The way forward

Italians expect worsening developments over the next five years, maintaining a bleak outlook since 2021.

The Italian foreign policy outlook is not monolithic, though, and has some contradictions. The defensive stance described above sits alongside strong endorsement of an active foreign policy and support for spreading values through foreign policy (57%). This may reflect Meloni's assertive stance geared towards boosting Italy's visibility. Nearly 70% of respondents support reducing dependency on countries with different values, similar to EU peers. This contradicts Italian pragmatic stance regarding cooperation with non-like-minded states, mentioned earlier.

Italians' top foreign policy priorities remain climate change, with a significant rise in support for human rights and geopolitical tensions since the last survey. About half support stronger diplomacy and 37% back global disarmament efforts, the highest share in the poll, and an increase in opposition to military interventions. Confidence in the effectiveness and legitimacy of diplomatic, military and economic measures has declined. This reflects disenchantment with regard to foreign policy, which is unlikely to achieve desired peace scenarios. Unsurprisingly, diplomacy receives the highest approval, particularly from older people. Opposition to military interventions in conflicts increased and is the highest in the poll (74%).

At 26% Italians show by far the lowest support for increasing military spending, 72% prioritise social spending over defence.

Italians are very aware of the risks that climate change poses, even though only 45% of Italians see climate change as a threat to peace, substantially lower than the average. Some 62% favour doing everything to fight climate change, the highest share in the poll. Most Italians are dissatisfied with climate action, with the EU efforts regarded as the most satisfying (23%). Italian respondents show an overall decline in support for cooperation, but 74% see international partnerships as key to combating climate change. A majority also believe that wealthy nations should support poorer ones.

Amid broader trends of rising defence budgets across NATO, Italy has taken a divergent path. Italy has the lowest support for increased military spending among NATO countries, at 26%, well below the 57% average. Resistance to higher defence budgets reflects longstanding Italian attitudes, rather than war fatigue, as the support level in 2021 was nearly identical at 24%. Defence spending has steadily declined, dropping from 1.59% of GDP in 2020 to 1.46% in 2023, with further reductions projected. Italians overwhelmingly favour prioritising social and economic spending over defence (72%), the highest rate in the survey. As a result, if military spending rises, 52% favour a special levy on the rich.

Kazakhstan

[neutral and distanced]

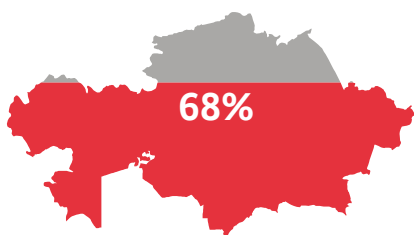
Kazakhstan, strategically located between Europe and Asia, is rich in natural resources, such as oil, gas and uranium. After gaining independence from the Soviet Union in December 1991, the country focused on modernising its economy and consolidating power around the long-time ruler Nursultan Nazarbayev, who in 2019 passed on the reins to his successor, Kassym-Jomart Tokayev.

In early 2022, widespread unrest erupted over rising fuel prices, economic inequality and calls for political reform. The government imposed a state of emergency, and the protests were suppressed with the decisive help of the Russian-led Collective Security Treaty Organisation, of which Kazakhstan is a member. President Tokayev thus managed to preserve his power and promised political reforms and anti-corruption measures to address public dissatisfaction. A constitutional referendum introduced reforms to strengthen the lower house of parliament (Mazhilis), implement a mixed electoral system, establish a constitutional court, and abolish the death penalty. These reforms consolidated the existing authoritarian regime.

Self-perception

Kazakhs' biggest concerns are inflation (89%), wars and conflicts (87%) and international terrorism (82%). Around 80% are worried about their personal future, while concerns about a worsening of their own economic situation ranks lowest in the poll (30%).

A majority (60%) believe that Kazakhstan's prosperity is linked to the well-being of other countries. Kazakhs feel rather satisfied with Kazakhstan's status in the international arena: just 44% feel that the country lacks the global status it deserves. This figure aligns with Sweden (44%) and is considerably lower than those of Poland (64%), Georgia (68%) and Türkiye (80%).



Kazakhstan should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Perception of the world

Kazakhstan has skilfully navigated geopolitical changes to transform its relative isolation into a strategic advantage. By maintaining equidistance between Russia and Ukraine, it preserves ties with Russia, while avoiding overt alignment. Kazakhstan does not implement sanctions against Russia and so it has to take care not to become a target of secondary (US) sanctions.

Kazakhstan is a member of several international organisations and served a second term on the UN Human Rights Council (2022–2024). Its foreign policy focuses on global nuclear disarmament and strengthening EU ties through the Enhanced Partnership and Cooperation Agreement. However, respondents show ambivalence towards international organisations, supporting a stronger UN (65%) and OSCE (50%), slightly higher than the poll average. They oppose a larger NATO role (50%), although younger respondents are less reluctant (18–29 years old: 33%). Half of respondents believe that international laws and rules are no longer relevant.

Kazakhs support a stronger UN and OSCE, but oppose a larger NATO role.

Kazakhstan's pragmatic approach balances competing interests while capitalising on its geographic and political positioning. This applies particularly to China and Russia, two of its largest trading and investment partners. A notable majority of 62% support stronger cooperation with Russia, which is the second-highest level of support in the poll, similar to that of Serbia (64%). Closer cooperation with China (68%) and with the EU (51%) is also desired.

Respondents exhibit a mixed stance, with the lowest agreement that EU policies conflict with Kazakhstan's interests, but also the second-lowest support for a larger EU role (42%, tied with Serbia). EU High Representative Kaja Kallas reaffirmed support for Kazakhstan's reforms and strengthening EU ties. Only 37% favour closer ties with the US.

This strategic pluralism underscores Kazakhstan's desire not to commit to a single bloc. Regarding preferred alignment, 70% support balanced relations between the West, Russia and China. Only 24% advocate aligning exclusively with two sides, namely Russia and China.

Kazakhstan leverages geopolitical momentum to assert its influence, but remains uncertain about how the emerging power dynamics will settle. Russia is perceived as emerging as a dominant power, while the EU is not regarded as becoming one. However, younger respondents see the EU as gaining influence and Russia as losing it. But regardless of age and power dynamics, 41% of Kazakh respondents see the country as vulnerable to a Russian attack. About 61% fear that future wars could directly affect Kazakhstan, but only 20% believe that a new world war is likely.

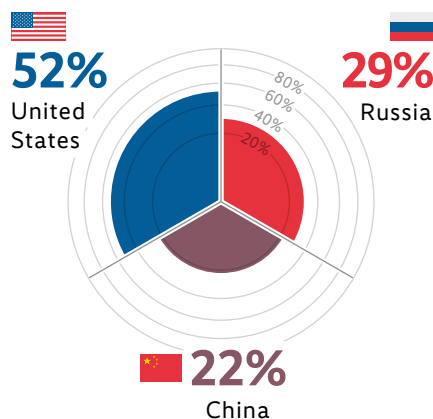
Contradictory interests in relations between the US and Russia (66%), and between the US and China (57%) are widely recognised. About half fear a new Cold War. Aligning interests are perceived between the EU and the US (37%), and especially between Russia and China (53%).

Kazakh respondents would prefer greater sovereignty in security matters. Most Kazakhs would like the EU to become more independent of the US and lean towards more diplomacy. However, the EU appears to have limited salience in Kazakhstan as almost 40% replied 'don't know' when asked who should lead EU security policy. Security threats to Europe they regard as emanating from the US (52%) rather than from Russia (29%) and China (22%). This contrasts with the polled EU countries, who perceive Russia to be the biggest threat.

Perceptions of the media are fairly evenly split, with 39% viewing reporting as objective and 38% seeing it as biased. Younger respondents are more likely to trust media objectivity.

This country is a threat to peace and security in Europe.

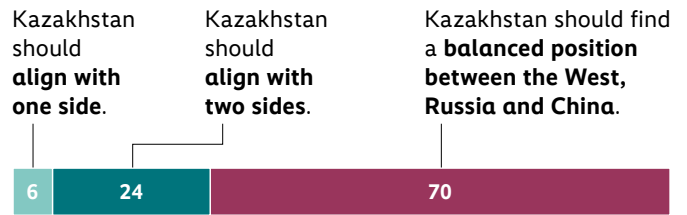
Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

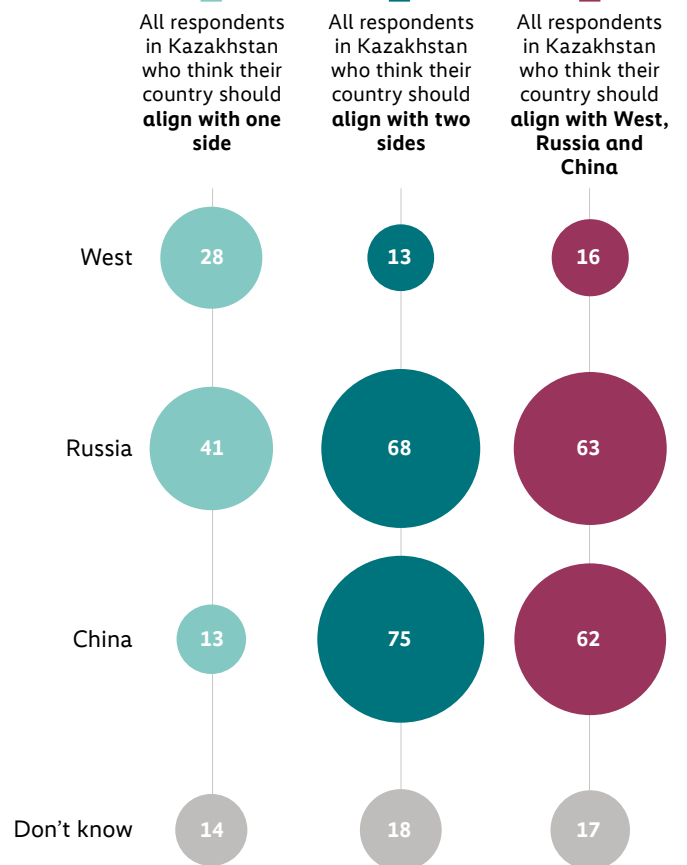
Kazakhstan is positioned between the West, Russia and China. How should it align itself?

All figures in %



Kazakhstan is positioned between the West, Russia and China. How should it align itself?

All figures in %

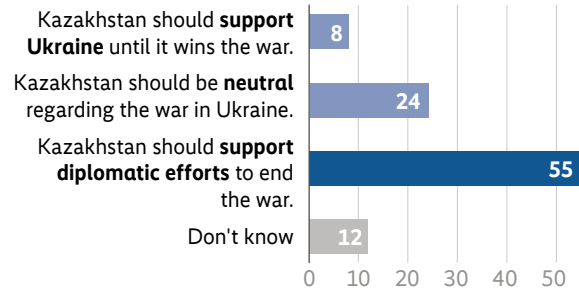


Deviations from 100% result from: 'no response'

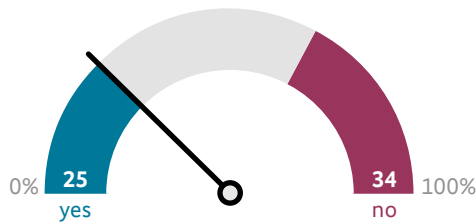
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Kazakhstan take in the war in Ukraine?

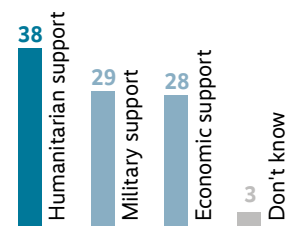


Do you think it is necessary to keep supporting Ukraine?



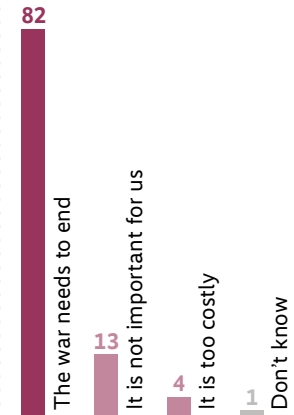
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine *should be supported*)

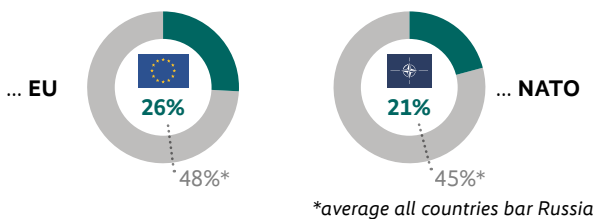


Why do you think Ukraine should not be supported?

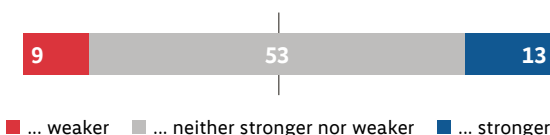
(Respondents who answered that Ukraine *should not be supported*)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Kazakhstan? Did it become...



70% support balanced relations between the West, Russia and China.

Perception of the Russian war against Ukraine

Kazakhstan's response to the war reflects a position of neutrality, maintaining good relations with both Russia and Ukraine. Accordingly, Kazakhs demonstrate a particular stance, differing from other respondents in the poll. For instance, blame for the war against Ukraine is attributed almost evenly to Russia (35%) and to Ukraine (30%). The US is seen as the primary aggressor, at 47% (although younger respondents attach far less blame to the US, at 26%). Only Serbs share this view. Some 40% view the war as a proxy war between Russia and the West, vying for global influence, ten points higher than the poll average.

Consistent with their preference for non-alignment, 35% answered 'don't know' when asked whether support for Ukraine should continue. Kazakhs show strong opposition to third-party intervention in the war. Further support for Ukraine is limited (25%, 18–29 year-olds: 37%), and if so, mainly through humanitarian aid (38%). They strongly oppose sending more weapons or ground troops to support Ukraine. Among those rejecting further support (34%), the vast majority cite the necessity of ending the war. Kazakhstan's role in helping Russia to circumvent Western sanctions is seen primarily as economically driven (29%). About a quarter replied 'don't know' or cited attempts at independence from Western influence (22%).

Kazakhs express high support (42%) for resolving the conflict through diplomacy. One reason for that could also be the possibility of an enhanced role for their country. The president's diplomatic experience and his good ties to China may allow Kazakhstan to play a constructive role in ending the war against Ukraine.

Kazakhs view Russia as strengthened by the war, while opinions on China are more mixed, with many seeing it as either strengthened or unchanged. Their own country is perceived as unchanged (53%), and least weakened (9%) in the poll. This aligns with respondents' perceptions of the momentum of geopolitical change.

The way forward

Optimism about Kazakhstan's future is particularly pronounced and ranks among the highest in the poll. Respondents expect improvements for Kazakhstan (66%), the world (49%) and for Europe (46%). Younger respondents are particularly optimistic.

Foreign policy priorities focus on combating terrorism (59%), addressing human rights violations (43%), and managing geopolitical tensions (38%). Regarding climate change, about one-quarter are satisfied with the current policies of their own government, the EU and the international community of states. Among respondents under 30, however, Kazakhstan exhibits some of the highest values in the poll. Kazakhs emphasise the need for international cooperation and assistance from wealthier to poorer nations. Kazakhstan has significant potential in terms of critical raw materials, making it a sought-after partner. In this context, a majority prioritise securing borders and competing for natural resources in response to potential instability caused by climate change, reflecting a pragmatic view of national interests.

Kazakhs view diplomacy as the most effective means of promoting international peace. They show one of the highest approvals that their country should assume more international responsibility. Affected by Soviet nuclear tests at the Semipalatinsk site in the Kazakh steppe, Kazakhstan voluntarily renounced nuclear weapons in 1992 following the dissolution of the Soviet Union. As a result, 77% oppose nuclear weapons, although younger respondents exhibit a slightly higher tolerance for their use.

Noticeable shifts in attitudes emerge among those aged between 18 and 29, driven by a more critical stance towards Russia. Younger Kazakhs see Russia as a greater threat to Europe (39%, overall: 29%), but still maintain a positive stance on cooperation with Russia. Younger people would be more willing to reduce dependency on Russia and China, even if this had a negative impact on living standards.

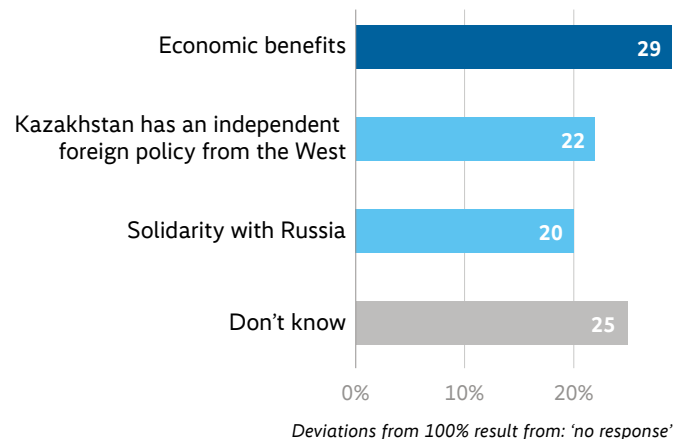
They show more interest in developing ties with the EU and the US. Their lower level of support for diplomatic efforts (40%, overall: 55%) and lower readiness to cooperate with non-like-minded states (58%, overall: 65%) may suggest a preference for a distinctive, more pro-European foreign policy course. This could significantly impact Kazakhstan's traditional balancing act.

Increasing the defence budget is supported by half of the population. Regarding future investments, around 68% of Kazakhs prioritise social and economic investments over military spending. As in other polled countries, the majority favour funding defence expenditure through a special levy on the rich.

Younger Kazakhs have a more critical approach towards Russia but still maintain a positive stance on cooperation.

Kazakhstan is helping Russia to evade Western sanctions. In your opinion, what is the primary reason?

All figures in %



Latvia

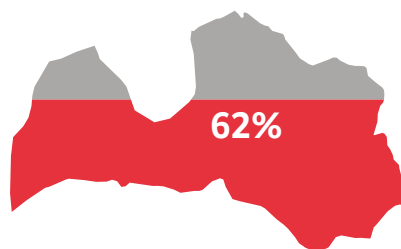
[supportive and cautious]

Latvia's independence and democratic transition after the fall of the Iron Curtain and its 2004 EU and NATO accession marked its return to the European community after Soviet occupation. In response to growing threats from Russia, Latvia, along with Estonia and Lithuania, introduced a new defence strategy in 2023, focusing on deterrence and strong defence capabilities on NATO's eastern flank. Latvia advocates for a stronger NATO presence, including a permanent combat brigade. Domestic debates are still ongoing about its substantial Russian minority. As part of its efforts to reduce Russian influence, from 2026 Latvia will require public media to be in Latvian and another European language, excluding Russian.

Self-perception

Latvian concerns about the future are substantial. Almost 80% express apprehension about what lies ahead. The primary concerns are wars and conflicts, inflation, and economic crises, while climate change ranks lowest. Only 44% worry that their economic situation will deteriorate.

Some 68% of Latvians perceive that the well-being of their country is linked to positive developments in other nations. In terms of global standing, just 47% believe that Latvia does not have the status it deserves, a comparatively low figure, consistent with 2022.



Latvia should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Perception of the world

Latvians emphasise their country's strategic dependence on alliances and have a generally positive view of international institutions such as the UN, NATO and the EU. Support for most institutions has diminished since the 2021 survey, except for NATO, which has remained stable. The Latvian government supports a stronger NATO presence and the foreign policy focus includes gaining a non-permanent seat on the UN Security Council (2026–2027).

The focus on collective security is reflected in the lowest approval in our poll of a »my country first« approach (48%). Some 64% favour reducing dependence on countries that

do not share their values. Some 82% seek stronger ties with the Baltic and Nordic States and 73% with the EU. Fewer than 40% view Latvian interests as being in conflict with EU policies. Around half of respondents favour stronger cooperation with the US, while 38% support closer ties with China. Notably, only 38% prioritise reducing reliance on China, the lowest level in the poll. Latvia seeks to achieve a balanced trade relationship with China while also seeking China's support in efforts to resolve the war against Ukraine. Perceptions of China as a threat to Europe have remained stable, rising only slightly from 32% in 2021 to 35% in 2024. In light of the Russian threat, only 20% favour closer ties with Russia, while 60% seek to reduce dependence.

The perception of divergence between global powers has decreased since the last survey in 2022. Still, EU–Russian and US–Chinese interests are seen as most contradictory. Relatedly, 63% expect a new era of wars and conflicts, although most people answer 'don't know' when asked whether there will be a new world war.

Overall, media perceptions are divided (48% non-objective, 39% objective), but have been improving in recent years. Since the war broke out in Ukraine, Latvia's ethnic Russian population has become more isolated, in a media landscape that has been divided for years, with Russian-language media becoming rare.

Accordingly, perceptions differ: 45% of Latvian speakers see it as objective, compared with 15% of the Russian-speaking minority. Overall, the perception of the Russian-speaking minority tends to be more pro-Russian, showing less support for Ukraine and limited engagement with the US.

Latvians show the lowest approval of a »my country first« approach.

Perception of European security

Half of respondents see Russia as a threat for Europe. Around 53%, above the average, see the EU as vulnerable without US support. Furthermore, 74% believe that Latvia lacks sufficient defensive capabilities and could not defend itself if Russia declared war, the second-highest figure in the poll alongside Georgia. Both are comparatively small countries directly neighbouring Russia.

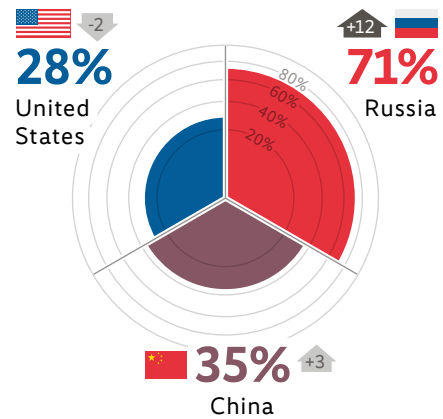
A majority (77%) view the end of the war against Ukraine as essential for improving European security. Concerns about Russia as a threat to European security remain high at 71%. By stark contrast, the Russian-speaking minority's perception is just 8%. What's more, within this minority, perceptions of a US threat rise significantly to 52%, compared with 28% of the total population.

Perceptions of NATO enlargement towards the Russian border and of the EU towards the East diverge from those of the other polled countries. Latvians tend not to view them as a threat to European security, while concerns are rising in other surveyed countries. Support for diplomacy as a means of resolving foreign policy crises has decreased, from 69% in 2021 to 58% in 2024. Reluctance toward military intervention in conflicts remains high, with 67% rejecting it, the same level as 2021.

For leadership in EU security, the trio of Germany, France, and Poland is most commonly seen as the leading force (36%), although 21% responded 'don't know'. Support for an

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.



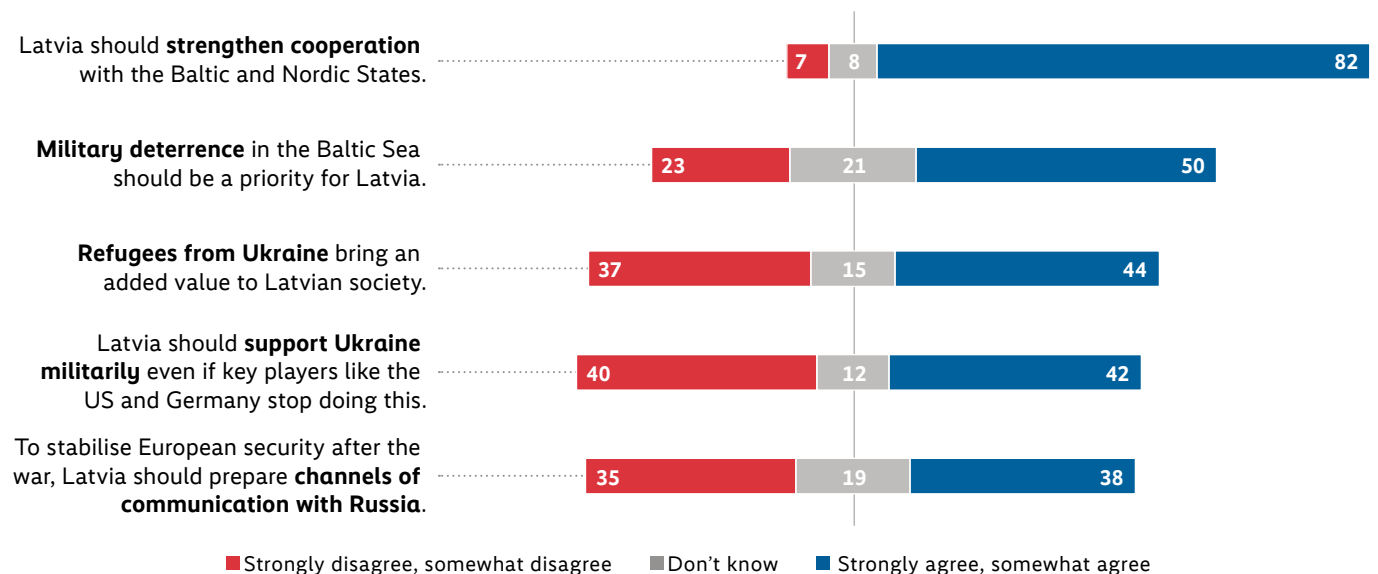
Combined responses 'strongly agree' and 'somewhat agree'

EU Army remains consistent at 50% and has not increased since Russia's full-scale invasion of Ukraine. Nearly 70% express a desire for greater independence from the US. To stabilise European security after the war, 38% advocate that Latvia should foster channels of communication with Russia.

Russian-speaking minority tends to be more pro-Russian, sees media reporting as not objective and shows less support for Ukraine.

Do you agree or disagree with the following statements about foreign policy of Latvia?

All figures in %

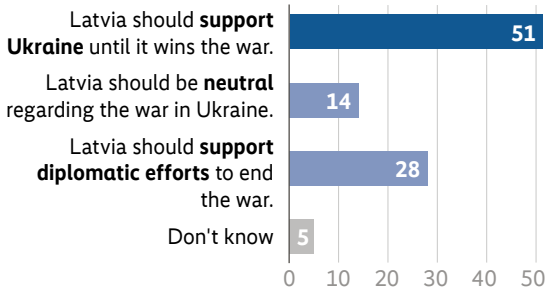


Deviations from 100% result from: 'no response'

War against Ukraine

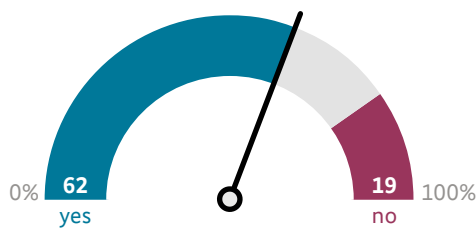
All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Latvia take in the war in Ukraine?



51% of Latvians are in favour of sustaining support for Ukraine until victory, but only **15%** believe Ukraine can achieve it.

Do you think it is necessary to keep supporting Ukraine?

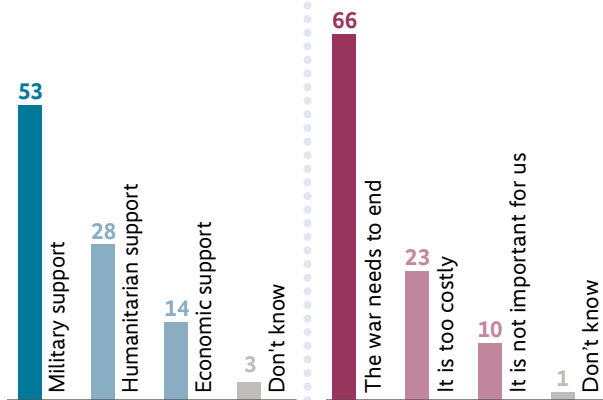


How should Ukraine be primarily supported?

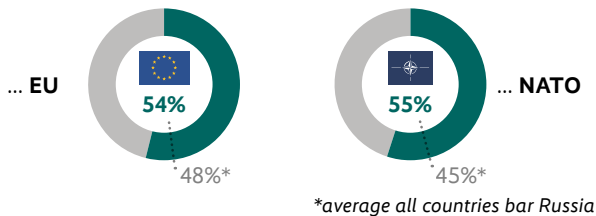
(Respondents who answered that Ukraine should be supported)

Why do you think Ukraine should not be supported?

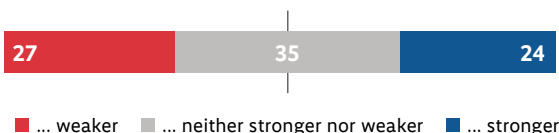
(Respondents who answered that Ukraine should not be supported)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Latvia? Did it become...



Perception of the Russian war against Ukraine

Latvian attitudes reflect opposition to aggression and a strategic dependence on alliances. Respondents identify Russia as the aggressor (72%) and as an imperialist state (37%). The invasion is seen mainly as a quest for territory (42%) rather than a proxy war or a fight between democracies and autocracies.

Latvians show strong support in the poll for continued aid to Ukraine (62%). However, only 18% of the Russian-speaking minority in Latvia share this view. Furthermore, 51% in Latvia are in favour of sustaining support until victory. However, only 15% believe Ukraine can achieve a military victory, which is the second-highest level of confidence in the poll. This discrepancy underscores a disconnect: while there is substantial support for continued assistance, confidence in a successful outcome is limited.

The strong pro-Ukrainian stance is reflected in the fact that 30% of respondents believe it is necessary that Russia lose the war, even at the risk of escalation. If Germany or the US stopped their support, Latvian opinion is evenly split on whether to continue their support. This reflects their reliance on strong allies.

Support is desired mainly through military aid. Latvians also express strong backing for sanctions against Russia. However, 74% oppose deploying troops, with only 12% in favour, less than the average of polled NATO states, perhaps due to fears of potential Russian aggression. Around 44% oppose increased weapons deliveries, perhaps because Latvia's own military aid to Ukraine has depleted its weapons stocks.

Most Latvians are in favour of Ukraine joining NATO and the EU (both around 54%).

The war is seen as strengthening NATO (37%) and weakening Russia (45%). The US (42%), China (38%) and Latvia (35%) are perceived as neither stronger nor weaker as a result of the war. However, these strong stances are predominantly held by the Latvian-speaking population; the Russian-speaking minority tends to adopt a more pro-Russian perspective, opposing sanctions against Russia and Ukraine's membership of NATO or the EU.

The war against Ukraine has affected domestic policy. This includes reintroducing compulsory military service and emphasising the Latvian language as a symbol of national identity, aiming to reduce Russian-language media content. The majority (37%, 18–29: 30%) believe that the debate is too much focused on Russian influence, detracting from other issues. This view is shared by 33% of the Russian-speaking minority and 54% of Latvians. Notably, 30% of all respondents (35% of Latvians and only 5% of Russians) consider the Russian-speaking minority a major issue. At the same time, 16% do not see any societal division and advocate for a greater focus on social cohesion, a worry shared by 67% of respondents.

Furthermore, only 44% of respondents view Ukrainian refugees as an added value. Agreement is even lower among younger respondents.

The way forward

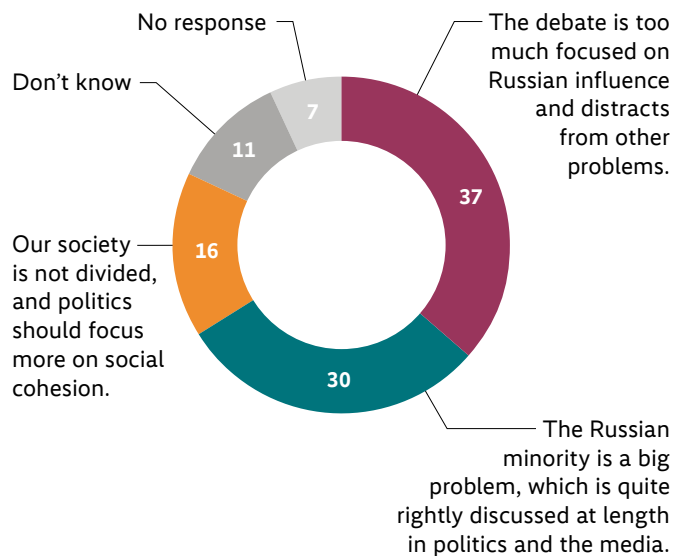
The Latvian public remains predominantly pessimistic about future developments, although younger Latvians display more optimism.

The nation prioritises national security and sees limited value in cooperation beyond its core aspirations and principles. Latvian respondents are willing to reduce dependencies on countries that do not align with their values (64%). International engagement without direct benefits ranks relatively low (32% approval). Given the country's defensive position, there is a slight decline in Latvia's stance on pursuing an active foreign policy and playing a significant role in solving international problems (2021: 54%, 2024: 49%). Therefore, 50% declare that military deterrence in the Baltic Sea should be a priority for Latvia's foreign policy.

Climate change ranks low among Latvian priorities. Only 30%, below the poll average, support taking all possible measures to combat it, while nearly half favour adaptation

Here are some statements about the situation in Latvia. Choose one statement that you agree with most.

All figures in %



strategies. Latvia's relatively low approval of international cooperation on climate change may reflect its focus on domestic challenges.

Diplomatic efforts are viewed as legitimate, but their perceived effectiveness is lower than in 2021. Overall, Latvia's defensive posture aligns with its growing regional significance within NATO and the EU. Latvia's top priorities are combating terrorism (53%), addressing geopolitical tensions (51%) and military build-up (37%).

Latvia's military spending has risen, accelerated by Russia's 2022 invasion of Ukraine. The government plans to increase defence spending, with a target of 3% of GDP by 2027, ranking it among NATO's top four contributors by share of GDP. Approval for higher military spending has risen from 37% in 2021 to 49% in 2024, while 40% remain opposed. Overall, Latvians favour social and economic spending over defence (60%). If defence spending is necessary, they prefer a special levy on the rich (47%) over cutting social or economic funds (18%).

Approval for higher military spending has risen from **37%** in 2021 to **49%** in 2024.

Poland

[aspiring and hesitant]

Poland historically has been caught between Eastern and Western powers. It endured partitions in the eighteenth century, occupation during the Second World War, and decades as a Soviet satellite until the Solidarity movement restored its independence. Poland joined NATO in 1999 and the EU in 2004, planting itself firmly inside the Western alliances. Now, it has emerged as a key player in European security, investing heavily in defence and supporting Ukraine.

The recent change of government, headed by Donald Tusk, has brought a pro-European focus and efforts to address rule of law concerns. Tusk's administration has also advocated for stronger EU cooperation in security areas such as border control and cybersecurity. This reflects Poland's historically security-centred foreign policy, shaped by its location and past experiences with the Soviet Union. Poland's central but vulnerable geographical position has compelled its population consistently to assert their sovereignty, while fostering a persistent desire for robust alliances.

Self-perception

Poles' biggest concerns are inflation (91%), wars and conflicts (89%), economic crises (84%) and uncontrolled migration (81%).

Some 63% of respondents view Poland's prosperity as linked to the well-being of other countries. Having said that, 64% believe that Poland does not have the status it deserves, a similar number to Italy. This figure is significantly higher than in other polled European countries, such as Germany or France (around 40%), and emphasises Poland's desire for greater recognition.



Poland should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Perception of the world

People's personal situations improved slightly compared with 2022: the proportion of people expressing concerns decreased from 83% to 73%, and fears of economic decline dropped from 67% to 46%. Some 62% believe an era of wars and conflicts is emerging. A large majority fear they will affect Poland in the future.

Poland desires strong support for international institutions and robust transatlantic relations. The majority are open to a greater role for the UN, the OSCE and the EU, with NATO receiving the second-highest support in the poll (76%). Some 65% of those surveyed favour more collaboration with the EU. Even with the current pro-European course of the Tusk government, however, half of the respondents perceive their country to be regularly in conflict with the EU, a 10 percentage point increase since 2021. Poland's course of action within the EU should focus on strengthening its leadership (42%), the highest level of support among the surveyed countries, including Italy, Germany and France. A quarter advocate stronger European institutions, a figure notably lower than in Italy (40%) or Germany (37%).

*Poland sees the US as a key partner, with **75%** favouring more collaboration.*

Poland sees the US as a key partner, prioritising security cooperation over calls for greater autonomy. A large majority of 75% favour more collaboration with the US. Just 15% of Poles favour increased cooperation with Russia, compared with 43% in relation to China. Correspondingly, the proportion of people desiring reduced dependence on Russia (73%) is much greater than with regard to China (46%).

Poland's priority remains countering Russian influence, while China is viewed more favourably but still with some caution.

Perceptions of media reporting have become more balanced, with the same proportions viewing it as objective and as non-objective (43%). Younger people are more likely to perceive reporting as biased.

Perception of European security

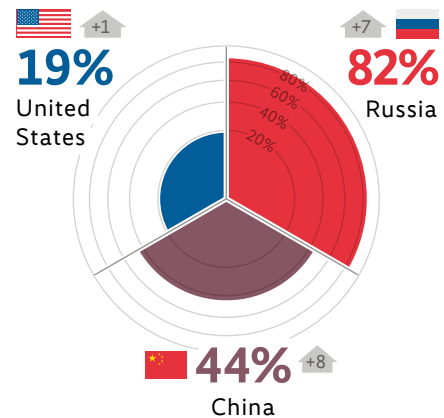
A broad majority in Poland believe that ending the war against Ukraine is a prerequisite for improving security in Europe. Russia is seen as the primary threat for Europe (82%), followed by China (44%).

Concerning Russia, there is a keen awareness of potential conflict. Poland views EU and NATO enlargement as a potential threat to European security (44%). This concern is not significantly higher than in EU countries farther from the eastern flank. Support for a European Army has increased (from 49% in 2022 to 54%). Some 57% still support ensuring peace through non-military means, a 10-point drop compared with 2021. This shift highlights the growing trend towards militarisation.

Poland envisions the EU becoming an active security actor, focusing on regional stability and strong partners. Polish respondents show the lowest support in the poll for becoming increasingly independent of the US in security affairs. Tusk announced an improvement in relations with Germany, and 63% of those surveyed support this. Poland is also improving relations with France, as the three countries resumed the Weimar Triangle format.

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

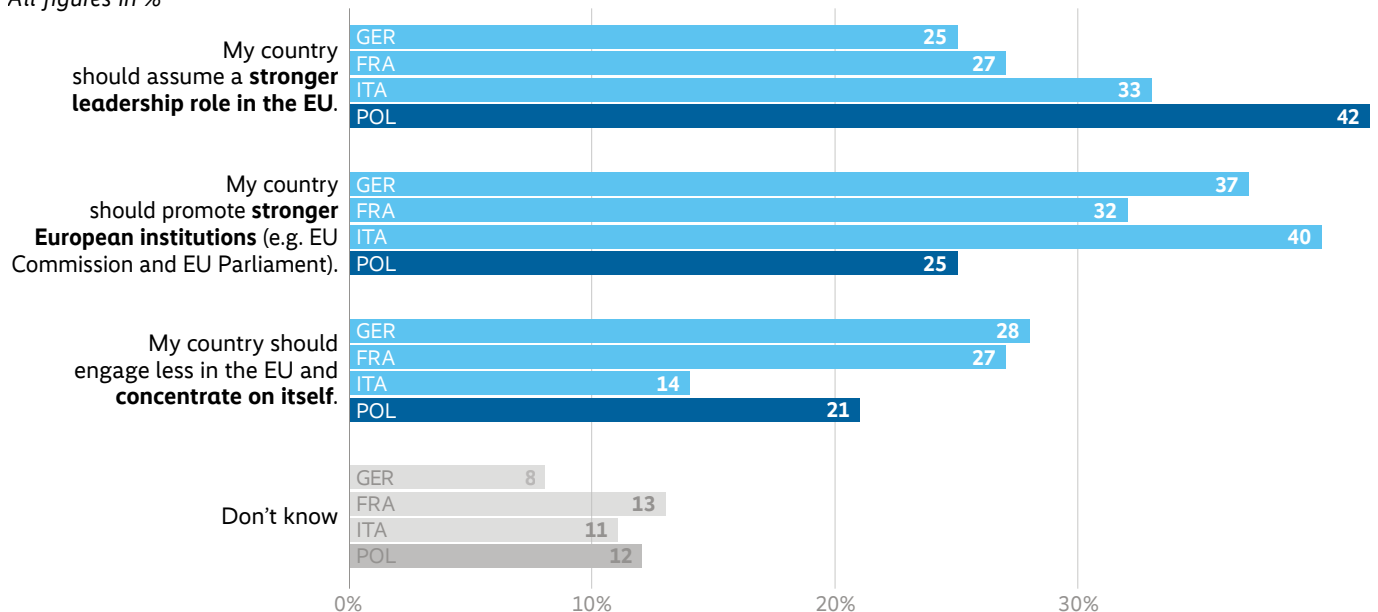
Some 42% of Poles prefer the trio as leaders in EU security compared with 24% for sole Polish leadership.

63% think Poland should improve relations with Germany. **42%** want the Weimar Triangle to lead the EU, more than in any other country.

In the event of a Russian attack, only 31% believe Poland can properly defend itself. Over half (56%) see the EU as unable to defend itself without the US. Younger respondents are more confident, showing greater resolve and trust in EU defence capabilities.

Think of the role that your country currently has in the EU. What should be the course of action?

All figures in %

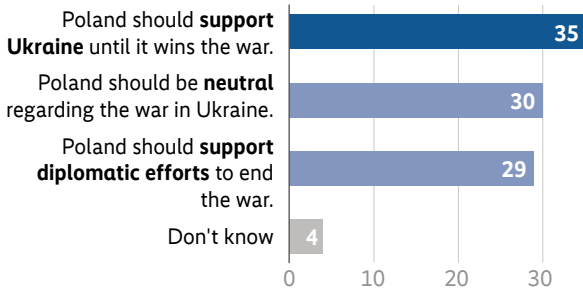


Deviations from 100% result from: 'no response'

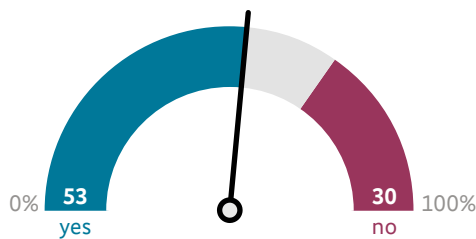
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Poland take in the war in Ukraine?

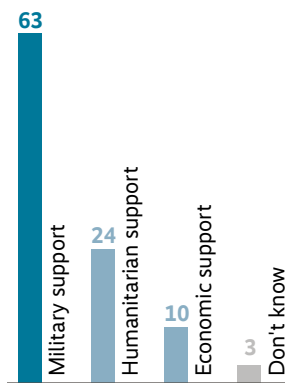


Do you think it is necessary to keep supporting Ukraine?



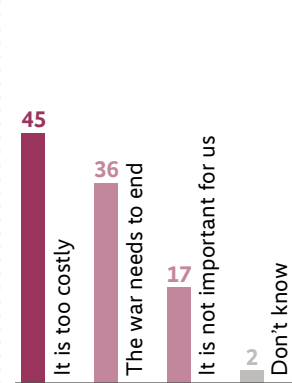
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine *should be supported*)

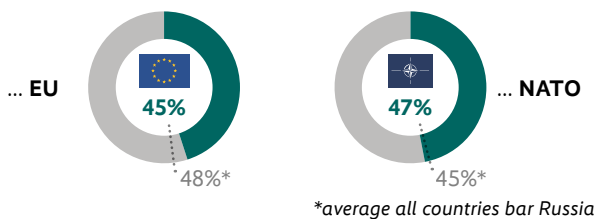


Why do you think Ukraine should not be supported?

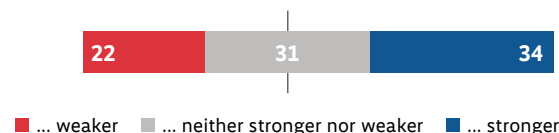
(Respondents who answered that Ukraine *should not be supported*)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Poland? Did it become...



War fatigue has set in Poland, with the focus shifting to national interests.

Perception of the Russian war against Ukraine

War fatigue has set in Poland, especially among younger respondents, with the focus shifting to national interests. Although Polish support for Ukraine remains robust within the EU and NATO, public support for Ukraine is declining. Some 35% back Ukraine until victory, 30% support neutrality and 29% favour diplomacy. Support for Ukraine's membership of the NATO (47%) and EU (45%) has also declined since 2022. Nonetheless, Poles see their country as strengthened by the war (34%).

Russia is clearly identified as the aggressor by 81%, although the share of people putting the blame on Ukraine has doubled since 2022 (from 8% to 16%). Asked for the reasons behind the Russian invasion, some 40% cite Russian imperialism, the second-highest figure in the poll after Ukraine. Consequently, 63% view it as territorial expansion (and not as a proxy war or contest between democracies and autocracies).

Opinion on continuing support is split, with war fatigue contributing to a decline. Only about half of Polish respondents, in line with the average of other polled NATO countries, support continued aid to Ukraine. Support is still desired mainly through military means (63%). The wish to send Polish troops has decreased from 21% in 2022 to 15% in 2024. This highlights a growing division on how to balance support with the risk of escalation. There is no majority for more weapon deliveries, although discussions are progressing between Poland and Ukraine on joint arms production. However, only 39% would continue support if the US or Germany stopped their aid. Among the 30% who decline further support for Ukraine, most respondents say it is too expensive (45%, the highest percentage in the poll). Another 36% just want the war to end.

The highest share (42%) believe it is most important to end the war even at the cost of territorial losses for Ukraine, while 30% favour restoring territorial integrity.

The 16% who prioritise Russia losing the war, even at the risk of escalation, is similar to the figure in Sweden and relatively high in the poll. However, many expect the war to end with a diplomatic solution (34%) or not at all (35%).

Poland has become a major destination for Ukrainian war refugees, but less than 40% see added value in their presence. Support among the younger generations is even lower. Additionally, 81% wish to protect Polish farmers, particularly on issues related to grain.

The way forward

Despite a bleak outlook for the next five years, Polish respondents are slightly more optimistic than the poll average. About a fifth expect improvements. A strong majority support an active foreign policy for Poland. Some 62% back the promotion of values abroad, in marked contrast to Germany (25%). However, only 40% want Poland to take more international responsibility if there are no direct benefits.

Regarding climate change, respondents are largely dissatisfied with current measures. They are most satisfied with EU policies among all respondents to the poll. While 46% support all possible measures to combat climate change, 36% emphasise adaptation. Climate change is seen as a global challenge for peace and security (59%). However, 64% think Poland should prioritise securing its borders and competing for natural resources in the global market.

Poland's foreign policy focuses on security, but reluctance towards military interventions is growing. Foreign policy

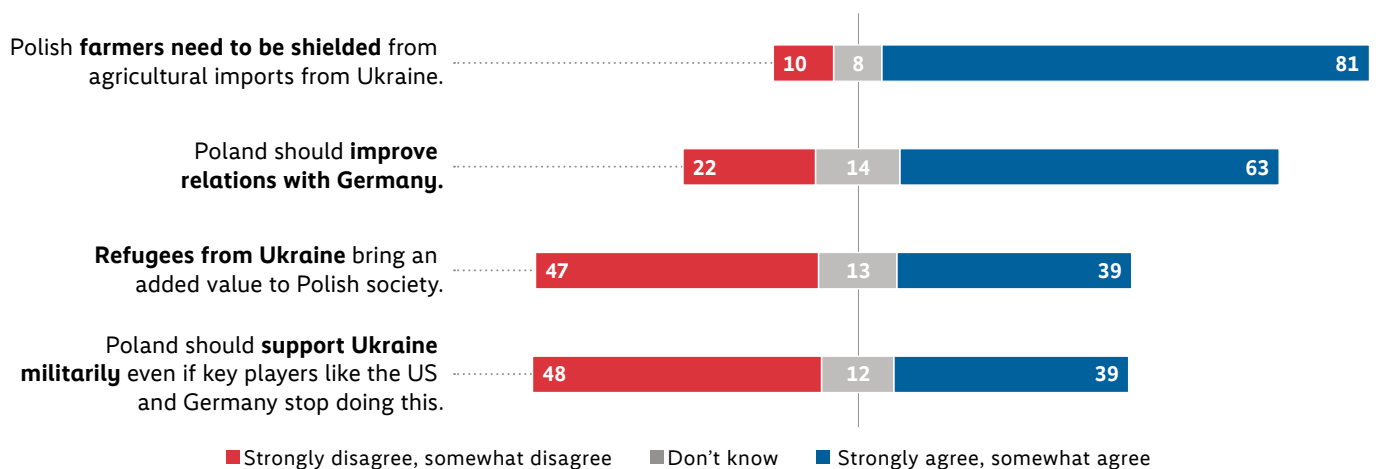
priorities include combating terrorism and extremism (58%), addressing human rights violations (41%, 48% women and 34% men), and managing geopolitical tensions (40%). There is also a focus on improving defence capabilities (43%). Strengthening international institutions and intensifying diplomatic efforts have less support. Diplomatic measures are considered the most effective (56%), followed by economic measures (49%) and then military action (42%). Military actions are viewed as the least legitimate by 30% of respondents. However, Poland has one of the highest approval ratings (39%, an increase on previous years) for pursuing military intervention in conflicts, alongside the US, Türkiye and Sweden.

Current defence spending for 2024 is 4.2% of GDP, projected to rise to 4.7% in 2025. Our survey reflects that 75% favour higher military spending, with approval increasing in recent years (2021: 53%, 2022: 69%). While 44% prioritise social and economic spending, 38% favour military spending, the highest share in the poll after Ukraine. Higher military spending should be financed by cuts in other budgets such as social spending (remarkable 38%, the highest figure in the poll) or a special levy on the rich (34%). Poland advocates higher military spending, but considers financing Ukraine to be rather costly. This has led the country to prioritise its own defence, with the goal of asserting military leadership in Europe.

With 39%, Poland has one of the highest approval ratings for pursuing military intervention in conflicts.

Do you agree or disagree with the following statements about foreign policy in Poland?

All figures in %



Deviations from 100% result from: 'no response'

Russia

[assertive and entrenched]

Russia re-emerged when the Soviet Union fell apart 30 years ago. During that period it has sought status parity with other global powers, especially the United States. A constitutional reform in 2020 enabled Putin to remove the limitations on his eligibility for election, allowing him to rule until 2036. On top of that the Russian political and legal systems are characterised by staged elections, politically motivated trials and repression.

After Russia annexed Crimea in 2014, relations with Ukraine and EU countries deteriorated. The 2022 full-scale invasion of Ukraine, in violation of international law, led to Western military and economic support for Ukraine, deepening the divide. In response, Russia has increasingly strengthened economic and military ties with China, while facing sanctions from the EU and the US. These sanctions are aimed at weakening Russia's economy and military, but are being partially circumvented with the complicity of third countries.

Until very recently Russia was also able to maintain a strategic presence in the Middle East, where it supported the brutal regime of Bashar al-Assad. After being ousted from power, Assad sought asylum in Russia.

Self-perception

Concerns about one's personal future are pervasive in Russia (80%). Opinions on one's personal economic situation are divided: 47% don't expect a deterioration, while 46% do, with younger respondents expressing higher levels of concern. Although the Russian economy has proved remarkably adaptable and resilient in the face of the war and ensuing sanctions, the rouble has been tanking, making imports more expensive and putting a strain on Russia's economy.

When it comes to Russia's global standing, 54% of respondents believe it lacks the status it deserves globally, while 38% think it receives the status it merits, slightly above the poll average (32%). Half of Russians see their well-being linked to the prosperity of other countries, even amid the sanctions in response to the war against Ukraine, aimed at isolating Russia.



Russia should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

While the West in general is seen as an enemy, the US is seen as much more of an adversary than the EU.

Perception of the world

Russian perspectives differ from others in the survey, but shared concerns persist. Russian respondents' views are therefore distinct, but not as much as might be assumed.

Russian public opinion reveals a significant hostility towards a greater role for international organisations. The UN is viewed most positively with regard to taking on a larger role, with 51% approval, slightly higher than in Germany (48%) but below the global average. The OSCE follows closely with 48% support. Not surprising, a bigger role for NATO meets overwhelming disapproval (70%).

Russian views on global power dynamics indicate their belief in the end of Western dominance. While the West in general is seen as an enemy, the US is seen as much more of an adversary than the EU. This is mirrored in perceptions of contradictory interests between Russia and the US (84%) and Russia and the EU (68%). Notably, both values have nearly doubled since the last survey in 2021, reflecting a new climate of confrontation.

The US remains the main adversary in the eyes of respondents. A majority believe that the era of American supremacy is over. Relatedly, cooperation with the US is anathema, rejected by almost 70%.

Russians overwhelmingly cite the US (55%) as a threat to their country, followed a long way behind by the UK (10%). Ukraine and China are perceived as threats by only 4% of respondents, while NATO and the EU are mentioned by negligible percentages. About 1% mention 'Russia is its own enemy'.

The EU retains a generally positive image, although opinion is divided. Interestingly, despite the EU's increasing distancing from Russia because of the war against Ukraine, identification with European culture in Russia has endured (69%, compared with 65% in 2021). While 77% see EU policies as conflicting with Russian interests, attitudes towards increased cooperation are mixed (48% opposed and 45% in favour). Russians don't believe that the EU is becoming a global power, and a bigger role for it in the future is rejected (54%). However, Russians attribute military strength to the EU, as 68% believe the EU can defend itself without US support, more than double the average of polled European countries (32%). Here they follow the trend that the EU is perceived to be stronger by outside countries than by its own members.

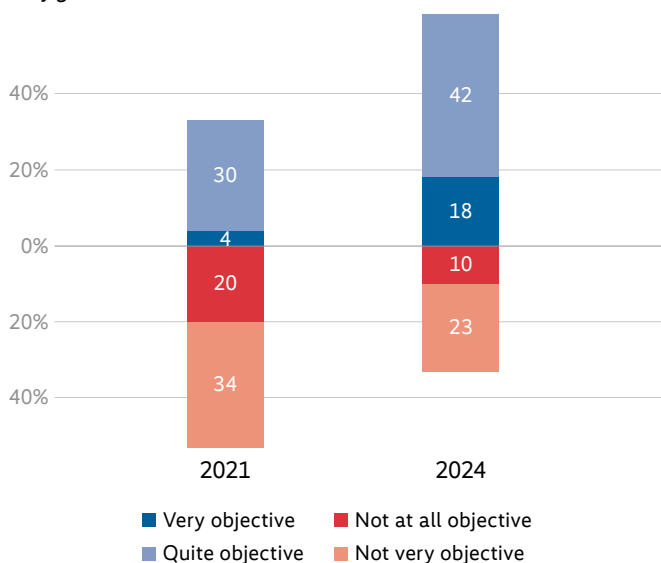
In response to international sanctions, Russia has increasingly turned eastward. Russian respondents favour further collaboration with China, and almost 80% perceive Russian and Chinese interests as not contradictory.

Notably, nearly 70% of Russians see their country emerging as a new leader among non-Western countries, the highest percentage in the poll, coupled with a »my country first« approach. However, fewer Russians anticipate this compared with the poll average (45% vs 64%).

Russians expect an era of wars and conflicts (58%). A notable majority (62%) fear that wars and conflicts will impact

Do you think that the media's reporting in Russia on foreign and security policy is factual and objective?

All figures in %



Deviations from 100% result from: 'don't know' and 'no response'

Perceptions of Russia towards the EU and the USA

Figures display agreement. All figures in %.



* average of Germany, Italy, Poland, France, Sweden, Latvia

** Is there a country that constitutes a threat to your country? (open question)

Russia in the future, though this is ten points lower than the poll average (72%). Only 29% of Russians fear a new world war, however. Their concerns focus on tensions between Russia and the West, as 64% believe new wars in Europe are likely because of these growing tensions. About 61% predict a direct military confrontation between Russia and the West. This is much higher than the 48% average of the EU, UK and US, showing stronger concerns in Russia. Additionally, 57% foresee a new Cold War, a view shared by 54% of respondents in the US.

Russia's invasion of Ukraine is a violation of international law. This disregard for international rules is shared by 64% of respondents, the highest proportion in the survey, who believe that international law is no longer relevant. Russians under 30 maintain a slightly stronger belief in international law (39%).

70% of Russians see their country emerging as a new leader among non-Western countries.

Perception of the Russian war against Ukraine

Russian perceptions of the war contrast sharply with international viewpoints. Only Serbians display similar attitudes.

Russia annexed Crimea in violation of international law in 2014 and invaded Ukraine in February 2022. Russian disinformation and propaganda include attempts to discredit Ukraine. When asked about reasons for the war, respondents cite protection of Russian interests (37%), the fight against fascism (23%), and protection of the Russian-speaking population in the Donbas (21%).

Some 73% of Russians blame the US for the war, well up from 51% in 2021. This aligns with Russian propaganda, which portrays the West as the aggressor. This is followed by almost the same shares for the EU (32%) and Ukraine (30%, although this has fallen substantially from 55% in 2021). However, only 22% attribute responsibility to Russia, in stark contrast to the Western perspective, although this figure rises to 44% among respondents under 30. Similarly, only slightly lower than their European peers, a majority (62%) believe that ending the war is crucial for improving European security.

44% among Russians under 30 attribute responsibility for the war against Ukraine to Russia.

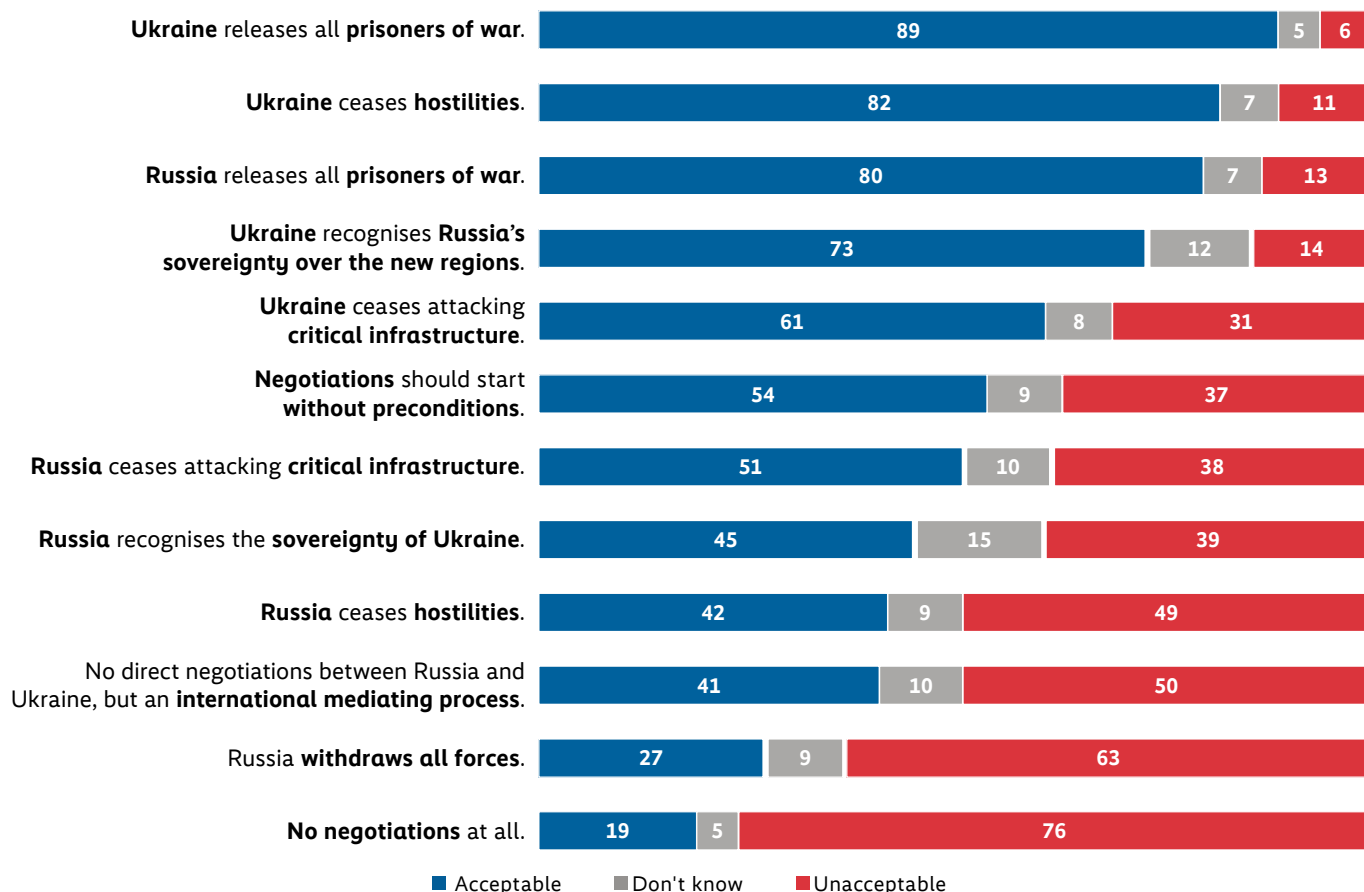
As expected, a majority of Russians oppose Ukraine's membership of NATO or the EU, reflecting longstanding concerns. Only Serbians share this view, while all other polled nations take more favourable stances.

Some 69% of Russians see NATO enlargement as a threat to European security, while 51% hold similar concerns about EU expansion. This highlights a consistent view: NATO (or the US), not the EU, is seen as the primary adversary.

Putin's propaganda shapes public opinion in Russia, although Russian respondents share some perceptions with other polled nations, offering a glimpse of potential common ground. For example, concerns about nuclear escalation are widespread (65%). About 45% of Russians do not believe the war will end within the next 12 months, even higher than the poll average of 37%. Remarkably, even in Russia only 36% of respondents believe that Russia is going to prevail militarily. They also believe that the war will end with a diplomatic solution.

If Ukraine were to start negotiations with Russia, which conditions should be fulfilled from your point of view?

All figures in %



Deviations from 100% result from: 'no response'.

Only 36% of respondents believe that Russia is going to prevail militarily. Majority believe in a diplomatic solution and support negotiations without preconditions.

There is growing acceptance in Russia that it is time to start negotiations. Some 76% see it as unacceptable not to start negotiations at all. Over half (54%) would accept negotiations without preconditions. The most acceptable conditions for negotiations include Ukraine releasing all prisoners of war (89%) and ceasing hostilities (82%), and Ukraine's recognition of Russia's sovereignty over the annexed regions (73%). However, a majority find it unacceptable for Russia to withdraw all forces (63%). Opinions are mixed regarding internationally mediated negotiations (50% unacceptable, 41% acceptable), which is notable given Russia's traditional resistance to external involvement in its security affairs. Nonetheless, this partial openness to diplomatic engagement could serve as a basis for future peace efforts.

The way forward

Looking ahead over the next five years, Russians remain optimistic about their own country (57%), a view that has risen significantly compared with 2021 (18%, up from 39%). They are notably more pessimistic about Europe, while their outlook on global developments is mixed (34% foresee deterioration, 33% improvement).

Russian respondents display a pragmatic and interventionist stance. This is coupled with a focus on their well-being and

a desire to avoid international involvements (56%). They show the highest support for cooperation with any country, even those that do not share their values, if they promote peace (78%). Approval for military interventions has risen from 37% in 2021 to 47%, but 45% remain opposed.

Diplomatic negotiations are widely viewed as legitimate by an overwhelming majority (87%). Only 34% view economic sanctions and 29% military interventions as legitimate. The rejection of sanctions is expected, given the impact of the current sanctions regime on people's everyday lives.

Putin's new doctrine has lowered the nuclear threshold, using threats and nuclear deployments to signal a readiness to escalate, and correspondingly, respondents' attitudes toward nuclear weapons are particularly concerning. While 67% reject their use, 16% consider them a last resort, and a notable 17% see them as a means of defending vital interests, the highest proportion in the poll.

Support for increasing military spending has surged, with 67% in favour, making it one of the highest rates in the poll, more than double the figure in 2021 (32%). However, respondents are nearly evenly split when asked to prioritise social and economic (45%) or defence spending (44%). This is a notable difference from Ukraine, where defence spending has the highest priority. A majority support funding defence through a special levy on the rich, while only 9% back cuts to social and economic spending, the lowest figure in the poll.

67% support increased military spending, more than double the figure in 2021.

Media reporting

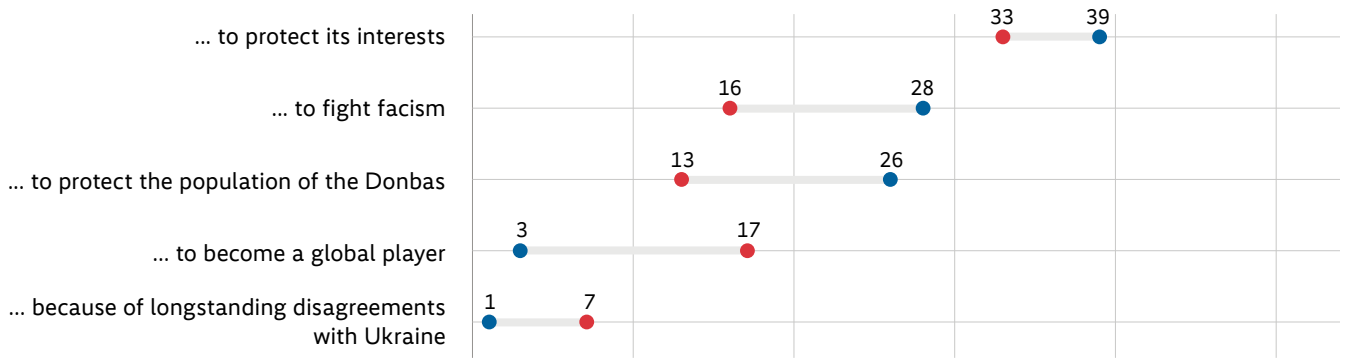
Media in Russia are tightly controlled by the state, undermining space for independent journalism. The invasion of Ukraine intensified this, forcing many independent journalists and outlets to flee.

Notably, public perceptions of media objectivity have shifted significantly. The percentage viewing the media as biased has dropped from 54% in 2021 to 34%, while the perception of media objectivity rose from 33% in 2021 to 60%. Regarding news consumption, 47% of Russians cite television as their primary source of information. Meanwhile, 40% rely on social networks, with Telegram being especially popular among younger respondents. Respondents who consume online media view media reporting as more biased (about 85%), while those who rely on TV, radio or print see it as more objective (about 80%). Perceptions of social media are more balanced.

The data reveal stark differences in how Russians perceive the conflict based on their view of media objectivity. Those trusting »objective« media cite Russia's protection of its interests, fighting fascism and defending the Russian-speaking population in the Donbas as reasons for the invasion. Those who perceive the media as biased often state 'don't know' or suggest motives such as seeking global power. Regarding the war's outcome, respondents who trust in an objective media believe in Russia's military victory, while others foresee no resolution or a diplomatic settlement. In short, state propaganda is working, but it has limits: those who trust state-controlled media narratives tend to align with the government's views on the invasion and predict a Russian military victory. Conversely, those who view the media as biased are more sceptical.

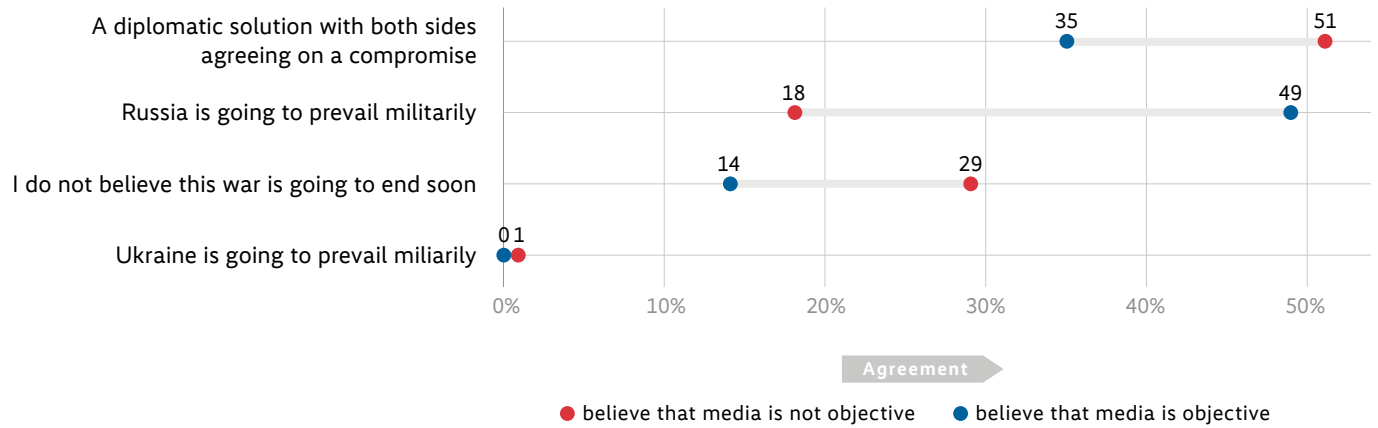
Why do you think Russia invaded Ukraine?

All figures in %



How do you believe this war is going to end?

All figures in %



Serbia

[recalcitrant and idiosyncratic]

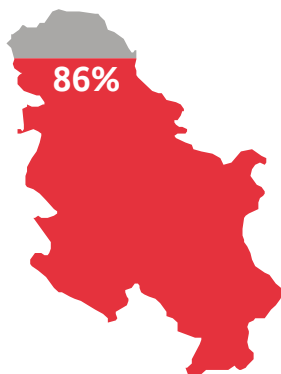
Serbia is trying to maintain a delicate balance between East and West. While it continues to engage with the EU, its strategic partnerships with Russia and China, particularly in energy, remain vital. This is a thorn in the side of the EU, which would like to see Serbia, an EU candidate since 2014, tone down its alignment with Russia. Historically, Serbia's geostrategic position has made it contested ground, something that persists today. It is being courted by both East and West in the broader struggle for influence in the Balkans.

Serbia's EU accession process is stuck and faces significant obstacles. Chief among them are Serbia's refusal to recognise Kosovo's independence due to an insistence on what it regards as territorial integrity and a lack of enthusiasm for NATO, rooted in anti-Americanism. The EU continues to press Serbia to normalise relations with Kosovo and to align more closely with European standards.

Self-perception

Serbs express significant concerns about their personal futures (72%). The biggest concerns are inflation (92%), wars and conflicts (2021: 77%, 2024: 86%) and economic crises (86%). Almost half of the population believe that their economic situation will deteriorate in the future.

A majority (63%) view Serbia's prosperity as linked to the well-being of other countries. The overwhelming majority (76%) believe that Serbia does not have the international status it deserves. The strength of this sentiment remains among the highest in the poll and expresses deep-seated dissatisfaction.



Serbia should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Perception of the world

There is a growing belief among Serbian respondents that the world is entering an era dominated by »my country first« policies (74%, above the overall average of 64%) and wars and conflicts (72%).

Serbia has consistently expressed scepticism toward international organisations, which has intensified since the last survey. Nevertheless, 60% favour a greater role for the UN and 53% for the OSCE. The position towards the EU is divided, with 46% opposing a stronger role and 42% supporting it. NATO faces the strongest opposition, with 78% rejecting an expanded role. In March 1999, NATO bombed Yugoslavia to halt the bloodshed and the ethnic cleansing of Kosovo's ethnic Albanian majority. This event was a defining moment in recent Serbian history and underpins a negative attitude towards NATO. Serbs are even more opposed to NATO today than they were in the years after the bombing campaign of 1999. This anti-NATO stance is reflected in the perception of NATO enlargement as a threat by 75%, by far the highest number in the poll, even surpassing Russia. Probably also connected to the bombing, Serbs largely reject the use of nuclear weapons (85%), while 14% accept them as a last resort. They also clearly reject military interventions.

75% perceive NATO enlargement as a threat, by far the highest number in the poll, even surpassing Russia.

Serbs seem to support a pragmatic stance and a multi-vector foreign policy. Collaboration with different players is desired across the board: 67% with China, 64% with Russia (the highest value in the poll) and 60% with the EU. In contrast, cooperation with the US (42%, dropping to 30% among those aged 18–29) is less welcome, and the majority disapprove (49%). Accordingly, Serbian respondents show the highest disapproval for economic decoupling (around 50% disapprove reducing dependence on Russia and China). Ties with Russia and China have indeed deepened since the fraudulent December 2023 elections, which brought President Aleksandar Vučić renewed victory. The Free Trade Agreement of 2023 strengthened relations with China, which are focused mainly on projects such as infrastructure investments and mining.

Serbian respondents perceive a potential reordering of global power dynamics, in which traditional Western dominance is called into question and the Russia-China block gains prominence. They also discern an end of the Western-dominated security order and express doubts about the EU rising as a global power (only 23%, 18–29 year olds: 30%). Russia's global leadership role is expected to grow (65%), the second highest figure in all surveyed countries after Russia itself. The US and Russia are viewed as having the most conflicting interests, more so than US–China,

EU–Russia or EU–China relations. Meanwhile, Russia–China relations are considered the second least contradictory, implying relatively greater alignment and cooperation.

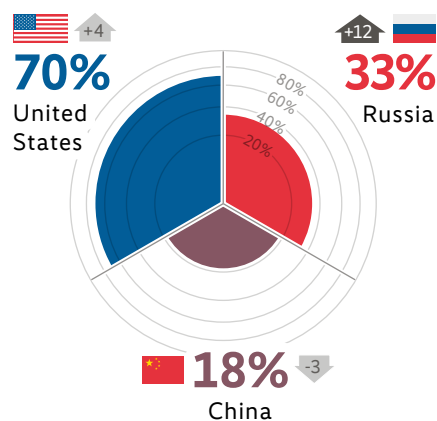
Serbian respondents are convinced that the EU should focus on diplomacy and ensure international peace through other means than building a European Army (79%, highest figure in the poll). A significant majority (78%) advocate for the EU to become less dependent on the US, though opinions are divided on the EU's ability to defend itself without US support (43% disagree, 41% agree). In line with their anti-American sentiments, Serbs overwhelmingly view the US as the greatest security threat to Europe (70%), the highest figure in the poll, compared with an average of just 28% in polled European countries. Russia (33%) and China (18%) are rather not seen as threats.

65% of Serbs expect Russia's global leadership role to grow.

The perception of the objectivity of media reporting is the lowest in the poll (68% think it is biased), even though it has improved slightly since 2021 (77%). This is largely due to pro-government media dominance, which has grown to exceed 90% since Vučić came to power in 2012.

This country is a threat to peace and security in Europe.

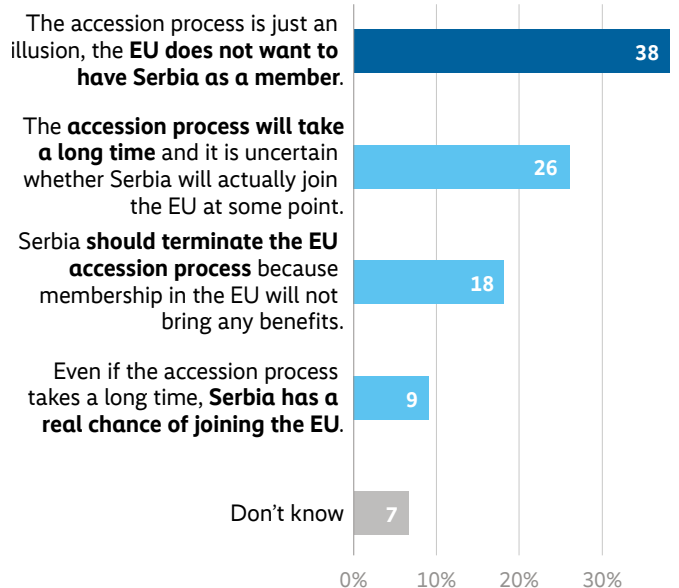
Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

At the end of 2009, Serbia applied for membership in the EU. Serbia has been holding accession negotiations with the EU since 2014. What do you think of the accession process?

All figures in %

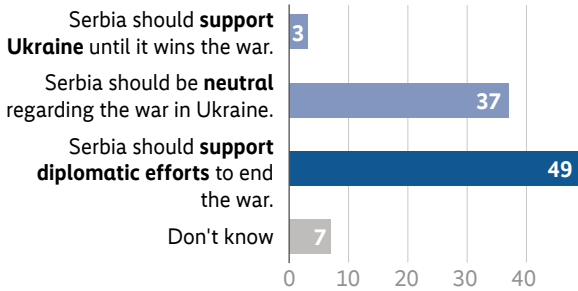


Deviations from 100% result from: 'no response'

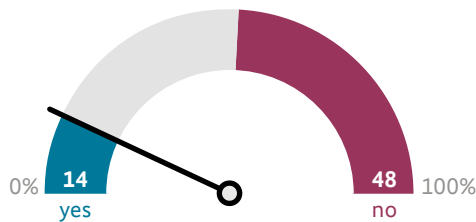
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Serbia take in the war in Ukraine?

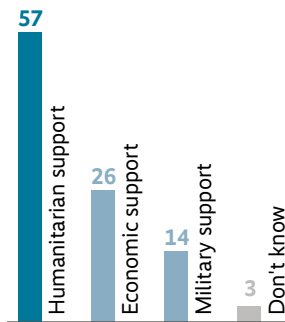


Do you think it is necessary to keep supporting Ukraine?



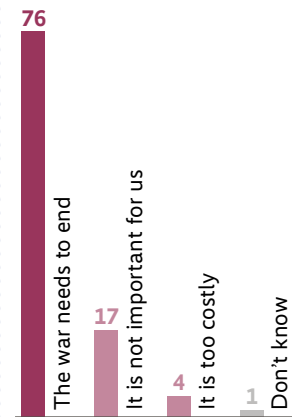
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine should be supported)

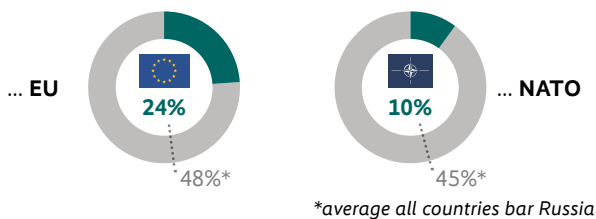


Why do you think Ukraine should not be supported?

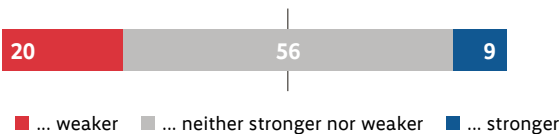
(Respondents who answered that Ukraine should not be supported)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Serbia? Did it become...



Only **3%** want to support Ukraine until it wins the war. **60%** view it as a proxy war and **28%** expect Russia to win.

Perception of the Russian war against Ukraine

Serbian respondents are overwhelmingly pro-Russian with regard to the Ukraine war.

Ukraine is blamed by 36% of respondents, the highest share in the poll, followed by the EU (30%) and the US (60%), only in Russia this value is higher. Only 26% consider Russia the aggressor, the lowest figure outside Russia itself (22%). Almost half, the highest share in the poll, think that it is not necessary to keep supporting Ukraine. The main reason people give is that »the war needs to end« (76%). A small share of 14% is in favour of supporting Ukraine, mainly focused on humanitarian aid. Serbs display the lowest support for helping Ukraine until it wins the war (a mere 3%, compared with the overall average of 30%). Instead, on a par with Italy, they are strong supporters of diplomatic efforts to end the war (49%). Together with Türkiye and Georgia, Serbia is also most amenable to a neutral stance (37%).

The country's anti-NATO and anti-Western attitude is in line with Belgrade's pro-Russia policy. This resonates with Serbians. Russia's actions in Ukraine are widely seen as defence of its own interests (41%), surpassing even perceptions within Russia (37%). Serbs are least likely to identify Russia as an imperialist state (4%).

They strongly believe it to be a proxy war between Russia and the West, vying for global influence (60%). Regarding the war's impact, 39% see Russia as strengthened. China is viewed as stronger (41%) or unaffected (38%), the EU as weakened (46%). Serbia is viewed as rather unaffected (56%).

Serbia's pro-Russian stance is highly visible in its rejection of Ukraine's EU and NATO membership. While 40% believe diplomacy will end the war, 28% expect Russia to achieve military victory, by far the highest share in the entire poll (with the exception of Russia, where 36% believe Russia will prevail).

The way forward

Serbs are cautiously optimistic about Serbia's future (36%) but notably pessimistic about Europe and the world, with majorities expecting deterioration. Notably, their outlook is more pessimistic than average, though the share of optimism increased slightly to 2021.

The optimism does not extend to EU accession, as Serbia has been negotiating with the EU since 2014. A majority (38%) believe the process is only an illusion and the EU does not want Serbia as a member. Some 26% still believe that it will happen, just the timing is uncertain. The unresolved Kosovo issue remains a significant obstacle, as the EU does not want to accept new members with unresolved territorial issues.

However, 25 years after the Kosovo war, the majority (66%, thereof 70% men and 61% women) believe that Serbia should maintain its position on Kosovo. Only a mere 11% favour recognition of Kosovo's independence. Remarkably, these perceptions are consistent across generations and haven't changed over time.

Serbia's foreign policy emphasises self-interest, with 86% focusing on domestic well-being and efforts to avoid international involvement. The desire for an active foreign policy is the second-lowest in the poll and has been decreasing (2021: 58%, 2024: 49%). Still, almost 60% want to promote values abroad.

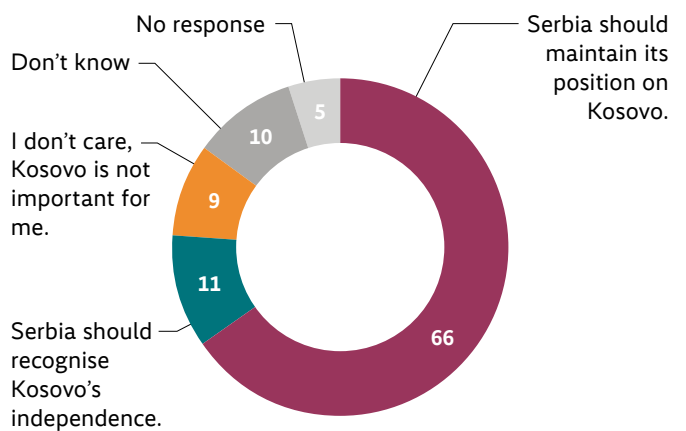
Foreign policy priorities include combating terrorism and extremism (51%), addressing human rights violations (48%), and managing climate change (46%). Regarding climate change, respondents are largely dissatisfied with current policies. They strongly support the idea that rich countries should protect poor and vulnerable countries and that international collaboration is key.

To promote peace, the respondents mention diplomatic efforts and international institutions. Overall, the perception of the effectiveness of all foreign policy means – diplomacy, military, sanctions – has decreased since 2021.

Serbia has invested heavily in its military, becoming the Western Balkans' leading force. About half of respondents support more military spending, just like in 2021. A large majority (67%) favour social and economic investments over defence. As in most other polled countries, a majority support funding such investments through a special levy on the rich (61%). Savings in other budgets are rejected.

25 years after the Kosovo war, what is your position on Kosovo?

All figures in %



Sweden

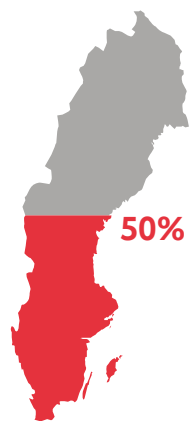
[resolute and committed]

Sweden, a parliamentary monarchy in Northern Europe, has a rich history, marked by its commitment to neutrality and diplomacy. Shortly after the Russian invasion of Ukraine in 2022, however, Sweden abandoned its 200-year-long policy of neutrality and non-alignment and applied for NATO membership. This shift resulted in a significant change in Sweden's defence policy and to its admission as NATO's latest member in 2024.

As an EU member since 1995, Sweden has emphasised human rights and sustainability on the global stage. The conservative Kristersson government, formed in 2022 with support from the right-wing Sweden Democrats, reflects a changing political landscape and has adopted stricter immigration policies, raising concerns about Sweden's commitment to climate protection and value-based foreign policy.

Self-perception

Swedes appear to be among the least worried respondents in the poll. Their main concerns pertain to inflation (74%), wars and conflicts (74%), and international terrorism (69%). This sense of security reflects Swedes' strong support for international engagement and their lower prioritisation of national interests. Despite abandoning its feminist foreign policy, its potential reintroduction enjoys majority support only among those under 30. The principle of reducing Sweden's dependence on countries that do not share similar values continues to have widespread support, especially among older respondents.



Sweden should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Despite Sweden's wealth, 74% of people express concerns about their personal future. Nearly half fear a decline in their economic situation, which is on a par with less affluent countries.

Swedes show general satisfaction with the country's current standing in the global community. Only 44% of respondents perceive a lack of international status, one of the lowest figures in the poll.

Perception of the world

Swedes foresee a new era of conflict, marked by a »my country first« mentality. Despite these concerns, Sweden ranks the lowest overall with regard to fears of war. The perception that future conflicts will impact the country are the third lowest in the poll and the lowest among NATO

and EU members. Half of the respondents expressed concerns about a direct military confrontation between Russia and the West. This suggests that while Swedes recognise global instability, they are comparatively less anxious about direct consequences for their nation.

Sweden ranks the lowest with regard to fears of war. While Swedes recognise global instability, they are less anxious about direct consequences for their nation.

The prevailing belief, as in Germany and France, is that American supremacy is rather over. A strong respect for international laws and norms persists, underscoring their commitment to a rules-based global order.

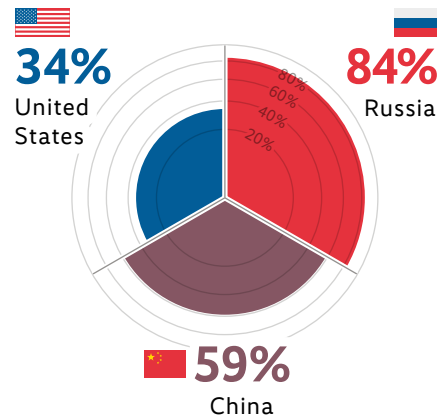
Some 62% of Swedes support greater cooperation with the EU. Swedes see the third lowest rate of conflict of interests between their country and the EU (35%), with women even less conflict-sensitive (28%) than men (43%). Also, half prefer greater cooperation with the US. Only 22% favour increased collaboration with China, the lowest rate in the poll. Second only to Ukraine, a mere 13% favour more cooperation with Russia, showing a notable gender gap, with 19% of men versus 7% of women in favour. That means that 74% want to reduce dependency on Russia, and 64% on China. When asked about contradictory interests between different players, the discord between the EU and Russia is viewed as greatest, followed by the United States and Russia. The EU and the United States, as well as China and Russia, are not perceived to have conflicting interests and rather as aligning (both at 43%).

Swedish perceptions of media reliability on foreign and security policy are rather positive. Next to Germany and Russia, Swedes put most trust in media reporting (51%).

Only **22%** favour increased collaboration with China, the lowest rate in the poll.

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

Perception of European security

Sweden's integration into NATO has been accelerated by the invasion of Ukraine, strengthening the perception of Russia as the primary security threat for Europe (84%), the second-highest figure in the poll. This is well above concerns regarding China (59%) and the US (34%). NATO expansion is seen as a security threat by 46%, on average with other polled NATO countries, while 38% disagree. Similarly, 42% view EU enlargement as a risk, with 36% opposing. The United States is viewed as posing the lowest security threat.

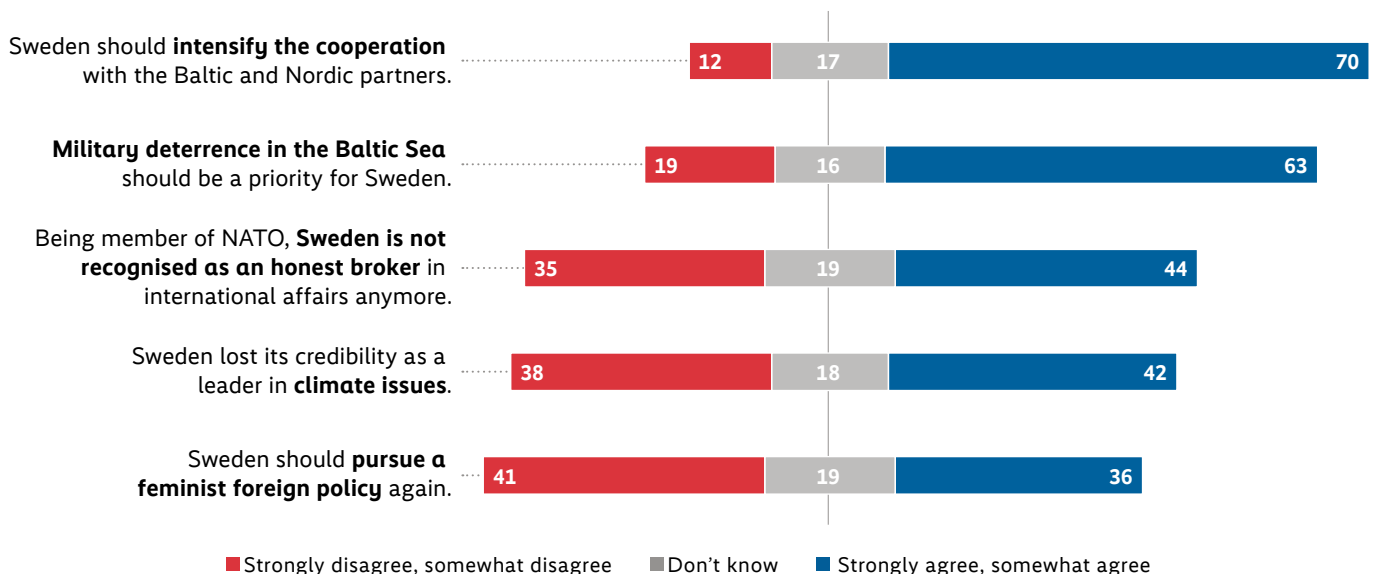
Sweden seeks to enhance its security in partnership with allies, as a significant portion of Swedes (66%) doubt their own defence capabilities in the event of a Russian attack. But even though Swedes regard themselves as vulnerable, nearly 47% still regard national defence as a domestic responsibility. The EU's defence capability without US support receives the highest confidence rating among EU member states, at 38%. At any case, a majority of respondents (54%) express support for reducing dependence on the US.

Reflecting Sweden's historically neutral policy, the large majority favour maintaining peace through non-military means. Around 45% are in favour of establishing an EU Army, notably lower than in France (56%) or Poland (54%). When asked about EU security leadership, a combined Germany, France and Poland or a solo German leadership is preferred (21%), although nearly a third answered 'don't know'.

Swedes rank third in the poll for trust in media reporting.

Do you agree or disagree with the following statements about the foreign policy of Sweden?

All figures in %

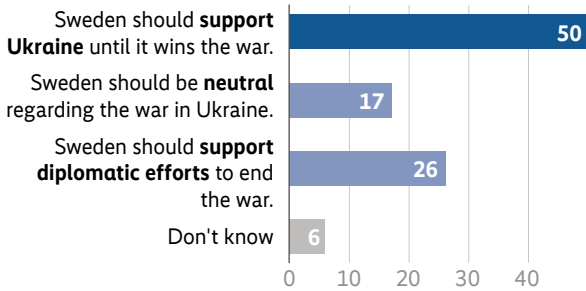


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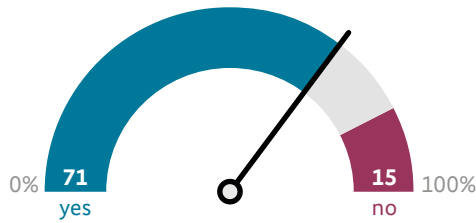
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Sweden take in the war in Ukraine?

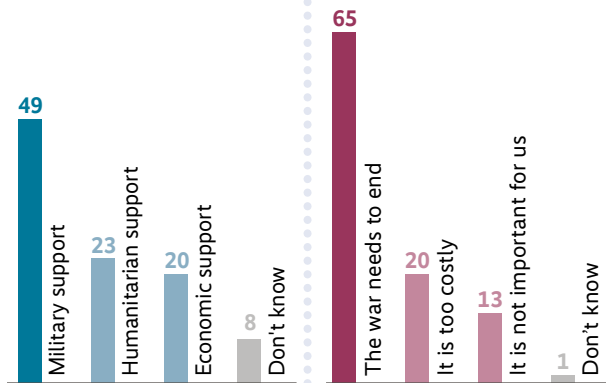


Do you think it is necessary to keep supporting Ukraine?



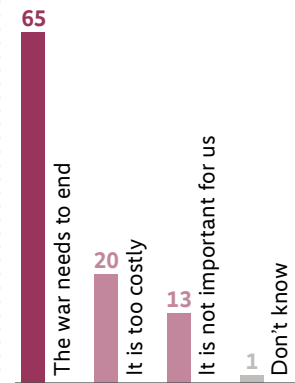
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine *should be supported*)

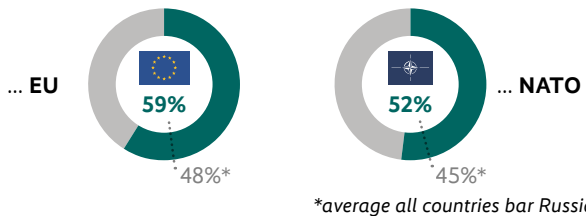


Why do you think Ukraine should not be supported?

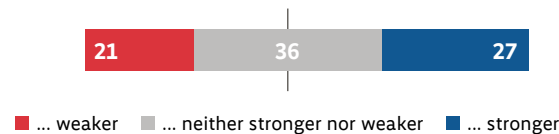
(Respondents who answered that Ukraine *should not be supported*)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Sweden? Did it become...



17% prioritise Russia losing the war against Ukraine, even at the risk of escalation.

Perception of the Russian war against Ukraine

Sweden is aligned with countries that emphasise a proactive and robust approach to security, prioritising strong defence policies and strategic deterrence in addressing potential threats. A majority, as in other polled countries, view ending the war against Ukraine as key to improving European security. The war itself is seen by 66% as territorial expansion and Russia as the major aggressor.

Swedish respondents take a strong position. Half of respondents advocate for continued support until victory. Another 26% favour further diplomatic efforts. Meanwhile, 17% – the second-highest value among NATO countries – agree that the top priority is to ensure that Russia loses the war, even with the risk of escalation. In line with this, support for Ukraine is desired mainly through military (49%), rather than humanitarian (23%) or economic (20%) means. Sweden is, just behind Poland, the second-strongest supporter in the EU of expanding sanctions against Russia (67%).

Concerning the effects of the war, Sweden expresses cautious optimism about a stronger role for NATO and the EU. Similar to most strong supporters of Ukraine, Russia is widely perceived as having been weakened by the war, indicating a decline in its influence.

The way forward

Thinking about the next five years, the outlook is rather bleak, with anticipated adverse developments for peace and security globally (58%), in Europe (45%), and in Sweden (34%).

Swedes now support an active and assertive stance, but the concept of neutrality still garners support. Half of the respondents seem to endorse greater international responsibility, even with no direct benefits (49%).

Some 62% plead for an active foreign policy and diplomatic negotiations are perceived as the most effective means of pursuing foreign policy. To maintain international peace, Sweden continues to prioritise the strengthening of international institutions, their commitment to multilateralism and dedicated diplomatic efforts. Swedes show the highest approval for enhancing these institutions among respondents. Over two-thirds support the idea of expanding cooperation with the Baltic and Nordic partners.

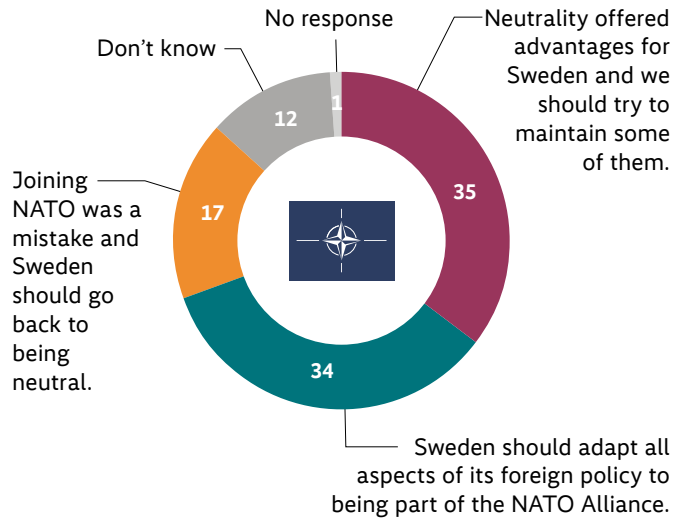
Swedes support a combination of assertiveness and neutrality.

The foreign policy priority is combating terrorism and extremism (66%, the highest value in the poll). This could be linked to the debate on NATO accession, as Sweden's agreement with Türkiye is linked to the »fight against terrorism«, driven by Erdoğan's concerns over Sweden's alleged support for Kurdish groups deemed threats to Türkiye's security. Another priority is to address human rights violations (50%), while this percentage is even higher (59%) among those aged 18-29, and women are more concerned than men. Climate change is in the top three (42%) and still almost half advocate taking every possible measure to combat it.

Sweden is widely recognised as a key advocate of multilateralism and collaborative efforts to address global challenges, to strengthen its national resilience to ensure preparedness for various crises. While only a third of respondents express satisfaction with the Swedish government's climate policy, this figure is among the highest for national climate policies, alongside the UK, Kazakhstan and the US. Sweden's traditional role is reflected in the fact that 71% of respondents support greater international collaboration, while prioritising domestic borders during instability receives the lowest approval in the poll. Furthermore, 64% of respondents express support for poorer countries.

Since Sweden joined NATO recently it is not a neutral country anymore. Please choose one statement that you agree with most.

All figures in %



As Sweden navigates the new geopolitical landscape, there is almost an equal split between adopting all NATO foreign policy directives (34%) and maintaining neutrality for its intrinsic benefits (35%). Moreover, there are some uncertainties regarding its military stance. Opinions are divided, with 44% supporting military intervention and 50% advocating a stance of non-involvement. In any case, Swedes express a clear rejection of the use of nuclear weapons (79%). Military spending has increased since 2018 and is supposed to reach almost double that of 2023 by 2030. Meanwhile, in line with the average for all countries included in the poll, over half of respondents prefer increased investment in social and economic programmes to military expenditure. If military spending is deemed necessary, however, 44% would prefer a special levy on the rich to fund it.

Türkiye

[independent and self-centred]

After declaring Türkiye an independent state Kemal Atatürk took the country in a more liberal direction. Secularism was adopted in 1928, and in 1950 Türkiye held its first free elections. Over the following decades, Türkiye aimed to strengthen international ties, joining NATO in 1952 and signing an association agreement with the European Economic Community in 1963. EU accession talks, ongoing since 2005, have stalled amid concerns over human rights abuses, restrictions on press freedom and democratic backsliding. EU membership now appears to be a very distant prospect.

Since Recep Tayyip Erdoğan came to power in 2003, an economic rollercoaster ride, including boom periods as well as mismanagement and high inflation, has further unsettled the population. Türkiye has also been involved in international conflicts, such as those in Syria and Nagorno-Karabakh. Under Erdoğan's leadership, Türkiye has taken a more assertive stance in foreign policy, positioning itself as a key force within the region and the broader Muslim world.

Self-perception

Turkish respondents generally display strong opinions, often ranking among the most or the least supportive of particular statements in the poll. Turks are plagued by concerns, with a notable 85% expressing worries about their personal future. The biggest concerns of Turkish people are inflation (87%), economic crises (87%), and wars and conflicts (83%).

A staggering 80% of Turks feel that their nation does not have the status it deserves, the highest level of dissatisfaction of all the countries polled. This level of dissatisfaction has hardly changed since 2021. However, Turks feel rather independent and autonomous, as only 56% (the third-lowest score among the poll) are convinced that Türkiye's prosperity is linked to the well-being of other countries.

Perception of the world

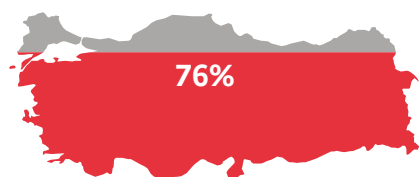
Türkiye's foreign and security policy is characterised by a plurality of institutional alignments. A greater role is desired for international organisations such as the UN (67%), the EU (61%), NATO (56%) and the OSCE (54%).

80% of Turks feel that their nation does not have the status it deserves – the highest level in the poll, unchanged since 2021.

Türkiye's geopolitical outlook is shaped by its complex relations with major powers. Opinions on greater cooperation with the US are almost evenly split at 44%. While 64% desire greater cooperation with the EU, almost the same share see a conflict of interests between the EU and Türkiye. In their view the relationship is unbalanced. A large majority (60%) perceive the EU as the primary beneficiary with only 22% seeing Türkiye in this role.

Similarly, Turks perceive their NATO membership as benefiting primarily NATO (51%) rather than Türkiye (30%). However, Türkiye holds a unique position within NATO given its peculiar relationship with Russia. It supplies the Ukrainian Army with weapons, but at the same time it is the only NATO member that does not implement sanctions against Russia. It has also not banned Russian aircraft from landing in Türkiye, having become a gateway for travel between Europe and Russia.

Türkiye seeks to broaden its partnerships beyond the West. With its application to join the BRICS, it could become the first country to be part of both alliances. Instead of adopting a de-risking strategy toward China, like many European countries, 64% of Turks favour stronger cooperation with Beijing. A majority (58%) favour closer relations with Russia, the third-highest share in the survey. Somewhat contradicting this, the same percentage (58%) would prefer reduced dependence on Russia and China, even if this has a negative impact on living standards.

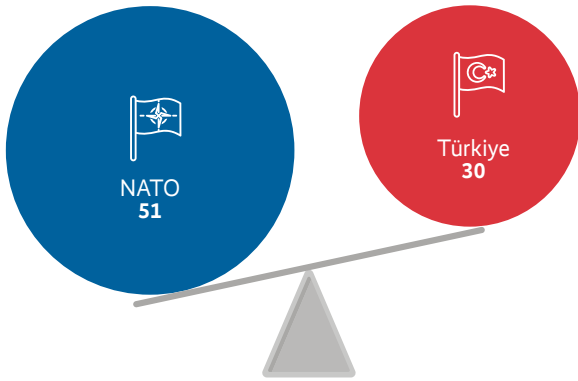


Türkiye should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Türkiye is a member of the NATO. Who benefits more from this membership?

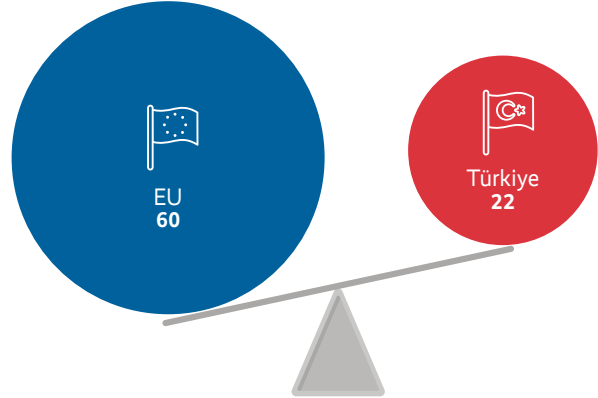
All figures in %



Deviations from 100% result from: 'don't know', 'no response'

Türkiye and the EU have a close relationship. Who do you think benefits more from this relationship?

All figures in %



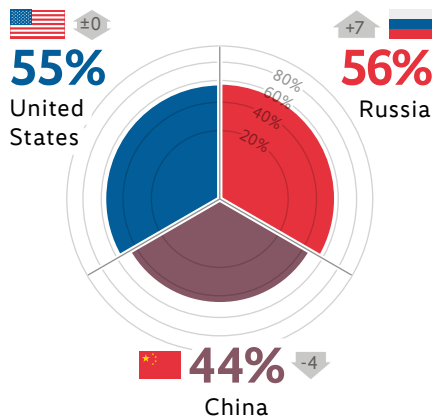
Deviations from 100% result from: 'don't know', 'no response'

Turks see their country as a centre of gravity. More than in any other polled country, they believe that middle powers such as Türkiye, Brazil and South Africa are emerging as new centres of influence (57%). This aligns with President Erdoğan's call for a »Century of Türkiye«, which is also mirrored by strong agreement (83%) that the world is entering an era of »my country first«. But Turkish respondents acknowledge other centres of power, too. Unlike anywhere else, they see potential for the EU to achieve the status of a global player (56%) and for Russia to assume leadership of the countries outside the West (57%; only in Serbia do more people agree).

57% believe that middle powers such as Türkiye, Brazil and South Africa are emerging as new centres of influence.

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

The emergence of new powers is more likely to spark competition than to foster cooperation. Turks express significant concerns about the possibility of a new Cold War (68%) and a new world war (56%), higher than the polled average. Some 74% fear a direct impact from wars and conflicts in Türkiye.

Turkish perception of risks to Europe differs notably from other NATO countries. They show less agreement that ending the war against Ukraine is a prerequisite for peace in Europe. Notably, Russia and the US are seen equally as threats (55%), followed by China (44%). Turkish respondents strongly perceive risks in the conflicts of interests between great powers: the US and China, the US and Russia, and the EU and Russia.

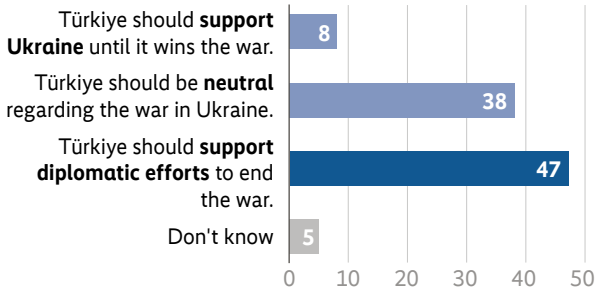
Turkish perception differs from other NATO countries. Russia and the US are seen equally as threats.

A majority (73%) believe that the EU should focus on diplomacy rather than build up a European Army. Türkiye has the highest trust among the polled nations in Germany as a leader in European security (33%), even slightly more than the Germans themselves (30%). In contrast to Poland's scepticism (28%), Turks trust Europe's ability to defend itself without US support (64%). Almost 60% of Turks see their country as well prepared to defend itself in case Russia declared war.

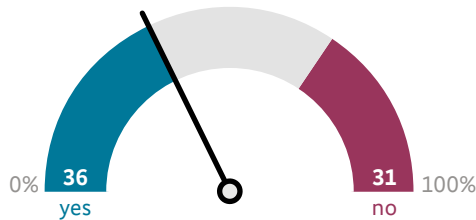
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should Türkiye take in the war in Ukraine?

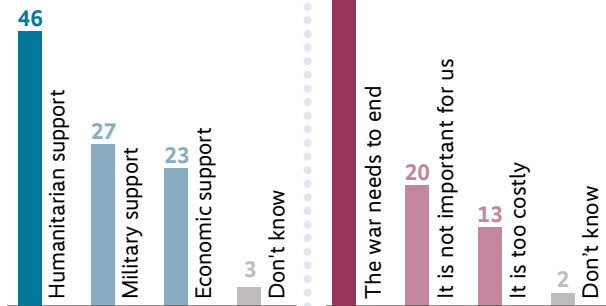


Do you think it is necessary to keep supporting Ukraine?



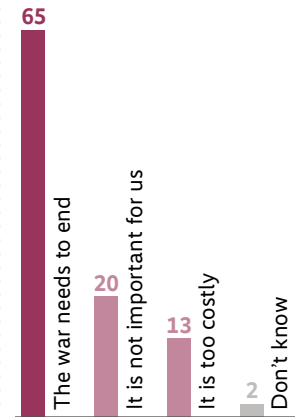
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine *should be supported*)

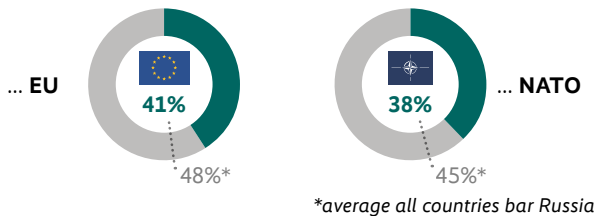


Why do you think Ukraine should not be supported?

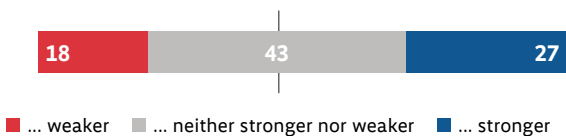
(Respondents who answered that Ukraine *should not be supported*)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Türkiye? Did it become...



64% of Turks trust Europe's ability to defend itself without US support.

Turkish respondents express significant distrust in media reporting. Only 25% view it as objective, while 67% perceive it as biased, the second-highest level of mistrust in the poll. However, the ratio has improved since 2021, when only 15% considered media reporting to be objective.

Perception of the Russian war against Ukraine

Türkiye's stance on Russia's war against Ukraine stands apart from other NATO countries. Some 42% view the war as a proxy war between the West and Russia, a sentiment shared only in countries outside the EU. Turks also view Russia's invasion as driven by long-standing disagreements between Russia and Ukraine (30%), the highest value in the poll.

While 50% blame Russia for the war, a significant proportion holds the US (47%) and the EU (26%) to blame. Consistent with Türkiye's unique positioning, 47% of respondents endorse diplomatic efforts to end the war. Some 38% advocate for a neutral stance, the second-highest share in the poll. Accordingly, the majority (46%) advocate for humanitarian aid, while only 27% support military aid (among 18–29 year olds: 36%). This figure is significantly lower than the average of 48% among polled NATO countries. However, in line with other NATO partners, the majority of Turks oppose troop deployment (73%).

On other issues, Turks are rather divided. Amid tensions with the EU over Türkiye's refusal to join sanctions on Russia, 45% support sanctions and 39% oppose them. Similarly, there is no decisive majority in favour of Ukrainian membership of the EU (41% support, 35% oppose) and NATO (38% support, 39% oppose). During the last NATO enlargement, Türkiye notably blocked Sweden's membership for months.

Among the 31% who believe that no further support should be provided to Ukraine, 65% believe that the war needs to end.

About half consider it most important to stop the war, even if it means that Ukraine loses control of some areas to Russia. This aligns with the survey results from 2021, when 60% of Turkish respondents agreed that borders have always changed as a result of wars. Still, the majority of Turks believe in a diplomatic resolution to the war.

Regarding the effects of the war, China (42%) and Russia (34%) are perceived to have been strengthened by it. In this context, Türkiye stands out once again, as other NATO countries perceive Russia as having been weakened. Next to Türkiye only Russia itself, Serbia and Kazakhstan think that Russia has become stronger.

The way forward

The prevailing belief for developments over the next five years is rather bleak. Around 62% of Turks fear that the global situation will worsen, with those 18-29 years of age somewhat more optimistic. Reflecting the »Türkiye first« approach, a notable majority prioritise focusing on the country's own well-being. Accordingly, only about half support assuming more international responsibility and helping other states if there are no direct benefits to Türkiye. Nevertheless, over 70% support an active foreign policy.

Foreign policy priorities include combating terrorism and extremism (50%), addressing international migration (45%), and tackling human rights violations (41%). For conflict resolution, Turks see diplomatic efforts as most important (46%), as these are viewed as the most effective and legitimate means. Regarding current involvements, a majority (58%) prioritise focusing on the conflict in Gaza, while only 6% choose war against Ukraine.

Only a quarter of Turks are satisfied with their country's and the world's climate policy efforts. Nearly 60% support taking all possible measures to address climate change. A broad majority support wealthier nations aiding poorer ones and emphasise international collaboration. However, if climate change leads to instability, around 71% favour border protection.

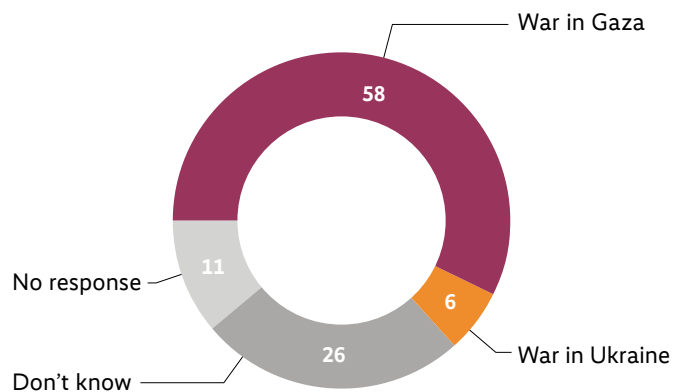
51% oppose military intervention in conflicts, up from **37%** in 2021.

Support for interventionist foreign policy is rather declining, in contrast with the reality of assertive Turkish foreign policy. Turkish respondents tend towards restraint, with 51% opposing military intervention in conflicts, up from 37% in 2021. At the same time, belief in the effectiveness of military intervention as an instrument of foreign policy is by far the highest in the poll (64%), which appears contradictory. Almost 70% oppose the use of nuclear weapons, 23% consider them acceptable as a last resort.

A majority (67%) support increased military spending. Still, 60% prioritise social and economic spending over defence, though this figure is higher among those aged 18-39. Most respondents believe that higher military spending should be financed by a special levy on the rich (62%). This represents one of the highest levels of support among the surveyed countries and reflects Türkiye's high inequality.

In your opinion, which of the two conflicts should be more in focus of Turkish foreign policy?

All figures in %



Ukraine

[disappointed and defiant]

Since gaining independence from the Soviet Union in 1991, Ukraine has undergone a profound transformation. The 2004 Orange Revolution marked the first major uprising against entrenched political elites, while the 2013–2014 Euro-maidan protests firmly aligned the country with the West, ushering in sweeping political, economic and social reforms. In 2014, Russia annexed Crimea in violation of international law, and in 2022 it launched a full-scale invasion of Ukraine. Since then, Ukraine, with support from the West, has been defending itself against the Russian onslaught. There is currently no prospect of a significant improvement.

Ukraine has been a candidate for EU membership since June 2022. At the 2023 Vilnius Summit, NATO allies agreed to strengthen Ukraine's defence sector, helping it transition to full interoperability with NATO.

Self-perception

Ukrainians, grappling with the harsh realities of war, express the highest level of concern in the poll, up on the previous survey. Ukrainians' primary concerns are wars and conflicts (overwhelmingly at 98%), inflation and the rising cost of living (95%), and economic crises (90%). Concerns about one's personal future are utterly pervasive (over 90%), far exceeding the poll's 75% average. Economic concerns follow, with 63% worried, compared with the 49% survey average. While respondents in other countries largely feel secure in their immediate surroundings, Ukrainian opinion is evenly split: 48% (62% of those aged 18–29) feel safe, while 47% do not. Significant regional differences are evident. In areas close to the frontline, such as Kherson, 83% of people report feeling unsafe, as do 64% in Sumy. In Kyiv, the perception of insecurity stands at 52%, slightly above the national average.

Concerning the international stage, about 74% believe that Ukraine lacks the status it deserves, which ranks Ukrainians among the most dissatisfied with their standing. About 71% view their well-being as closely tied to that of other countries, up from 62% in 2021.



Ukraine should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

Ukrainians express the highest level of concern in the poll. The perception of insecurity is higher in areas close to the frontline, such as in Kherson and Sumy.

Perception of the world

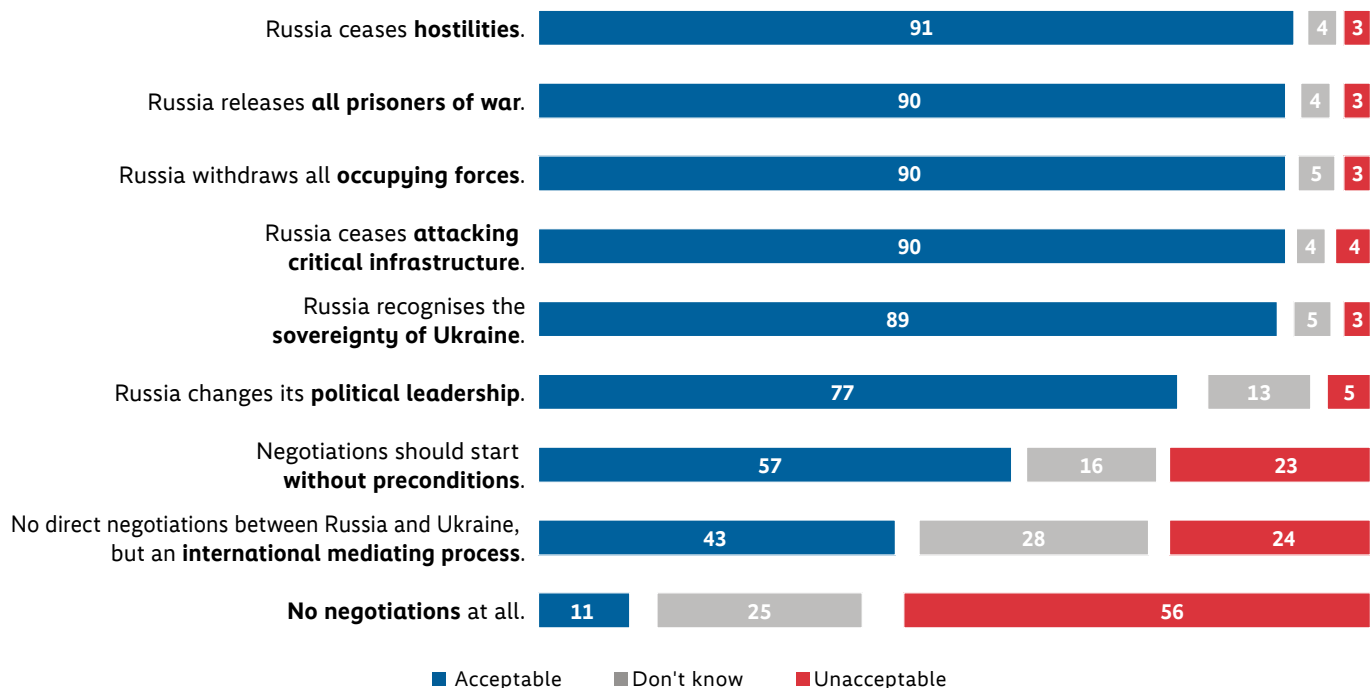
Ukrainians are the strongest supporters of an expanded role for international organisations in the survey, demonstrating their heightened reliance on international collaboration. They support an expanded role for the EU (79%), NATO (77%, significantly above the NATO members' average of 54%), the UN (70%) and the OSCE (63%).

About 90% of Ukrainians regard the end of the war as a fundamental prerequisite for improving security in Europe, highlighting the role of the country as a central focus of European security concerns. This interdependence is evident in the growing collaboration with Western powers and alliances. A significant majority of Ukrainians express a strong desire to join the EU (83%, up from 71% in 2021) and NATO (81%, well up from 62% in 2021). In line with their membership aspirations, Ukrainians do not view either NATO or EU expansion to the East as a threat.

The enthusiasm for closer ties is particularly pronounced regarding the EU: 86% of Ukrainians support closer cooperation. Opinions remain divided on whether the EU is emerging as a global power or whether its interests regularly conflict with those of Ukraine. Ukrainians demonstrate remarkable support for a European Army (75%, up from 56% in 2021). This level of support is significantly higher than the average among polled European countries (49%). It fits the perception of the EU's current defensive capability, as 53% of Ukrainians believe that the EU is not able to defend itself without support from the US.

If Ukraine were to start negotiations with Russia, which conditions should be fulfilled from your point of view?

All figures in %



Deviations from 100% result from: 'no response'.

Regarding EU leadership in security policy, Ukrainians prefer a trio of Germany, France and Poland (32%), or Germany alone (19%).

The US is another key partner, and 81% of Ukrainians express a desire for increased cooperation. They remain confident in the continuation of American supremacy (only 33% believe it is over). This aligns with the essential role of US support under President Biden in providing weapons and leading efforts to assist Kyiv.

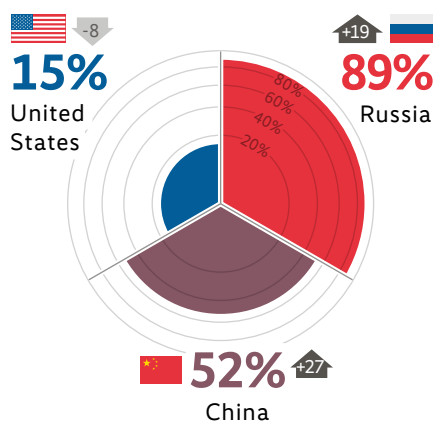
As a result of the invasion, there is widespread opposition (85%) to any closer cooperation with Russia.

A significant 85% advocate reducing dependencies on Russia, even if it negatively impacts living standards. Unsurprisingly, 78% do not agree that Russia is taking a leadership role among non-Western nations. Russia is also viewed by 89% as the greatest threat to Europe, followed at some distance by China at 52%.

Attitudes toward China are mixed. Although China is one of Ukraine's largest trading partners, it is a key ally of Russia. Support for closer cooperation is waning, although 49% still favour closer cooperation (down from 69% in 2021). Over half back reducing dependence on China, even if it has a negative impact on living standards, while 31% oppose this.

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

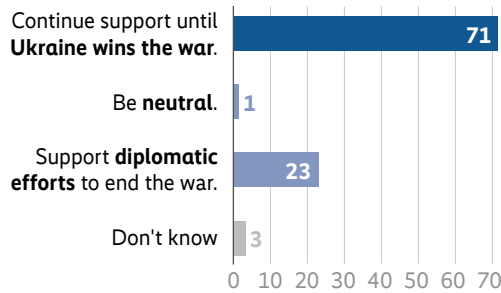
Perceived divergences of interest are considered most pronounced between Russia and the US (76%) and the EU (73%). These levels are notably higher than those observed between China and the US (64%) and the EU (49%). Ties between the EU and the US, as well as between China and Russia are not perceived as contradictory.

The war shapes perceptions considerably. Ukrainian respondents believe that a new era of wars is emerging (72%), also marked by a »my country first« (64%) mentality. Ukrainians are uncertain about the likelihood of a new world war; 39% answered 'don't know', while 36% lean toward 'yes' (respondents under 30: 45%). Above the survey average, 70% of Ukrainians believe that new wars in Europe are likely as a result of increasing tensions between Russia and the West and almost 60% see a direct military confrontation as probable.

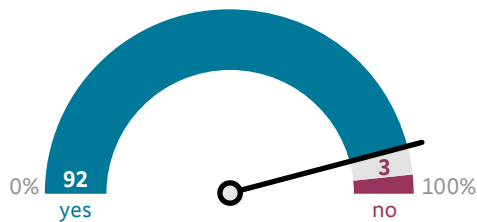
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

Preferred stances on the war in Ukraine

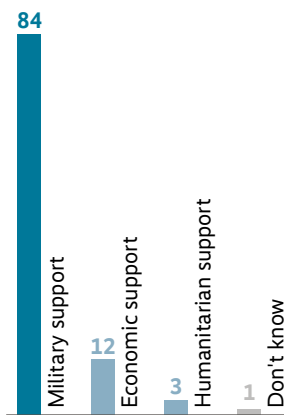


Do you think it is necessary to keep supporting Ukraine?



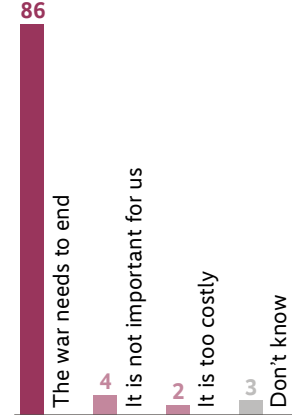
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine should be supported)

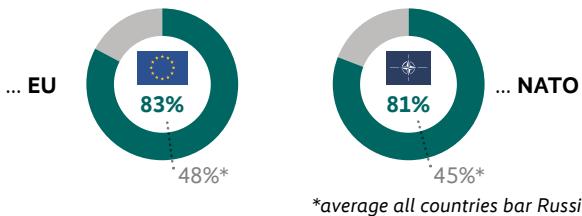


Why do you think Ukraine should not be supported?

(Respondents who answered that Ukraine should not be supported)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on Ukraine? Did it become...



Ukrainians under 30 are more likely to anticipate a new world war (45%) than the national average (36%).

About 63% believe that laws and rules are no longer relevant in international relations, on exactly the same level as in Russia and notably higher than the poll average (47%).

Around 50% of Ukrainians perceive media coverage as biased, but a considerable number (41%) view it as objective. It is unclear how much these attitudes are influenced by the »United News« television programme, which has been broadcasting since the war began, featuring government-endorsed content.

Perception of the war against Ukraine

In 2014, Russia annexed Crimea, violating international law, and in February 2022, it escalated into a full-scale invasion of Ukraine. At the time of the poll the Ukrainian military faced intense pressure in the east and southeast and Ukrainian forces had advanced into Russia's Kursk region to step up the pressure on Moscow.

An overwhelming 84% of Ukrainians hold Russia responsible for the war, followed by 26% who blame the US and 15% the EU. About 12% believe that their own country is responsible.

Considering the causes of the invasion, about half attribute it to Russia's imperialistic ambitions, followed by 29% who point to Russia's desire to assert itself as a global power. Only 8% see longstanding disagreements as a factor. In the characterisation of the war, 53% believe the invasion is aimed at expanding Russia's territory, in line with the respondents in most other polled countries, while 30% view it as a proxy war.

Not surprisingly, Ukrainians demonstrate the strongest support in the poll for continued defence assistance. Regarding their own position, 71% favour continuing aid until Ukraine wins the war, while 23% advocate diplomatic efforts to end the war. About 92% advocate further assistance. Asked about the means of support, Ukrainians predominantly favour military means (84%), ahead of economic and humanitarian aid. In a similar vein, an overwhelming majority back increased sanctions against Russia (90%, up dramatically from 67% in 2021), as well as weapons supplies (90%).

In line with President Zelensky's calls for international support and troop deployments, only a very small proportion of respondents (14%) oppose third-country intervention. About 66% of respondents fear nuclear escalation, fuelled by Russia's threatening rhetoric.

Ukrainians' determination is evident in their stance on ending the war, as almost 40% prioritise ensuring a Russian loss, even at the risk of escalation (the highest proportion in the poll). However, just 23%, albeit still the highest proportion in the survey, believe Ukraine will prevail militarily. In sharp contrast, just 3% think that Russia will prevail militarily, a figure that is significantly lower than the NATO average of 11% and markedly below the 38% of Russians. About 30% are willing to accept territorial losses to end the war (lower than the NATO average of 44%); and 21% support restoring Ukraine's territorial integrity, even if it prolongs the war. However, 35% don't believe that the war is going to end soon, while 30% foresee a diplomatic solution.

30% are willing to accept territorial losses to end the war, lower than the NATO average.

The continued desire for a Russian defeat is coupled with a growing acceptance of negotiations, as majorities accept starting them even without preconditions (57%) and oppose the notion of no negotiations at all (56%). Nearly all proposed conditions for negotiations receive strong support, with approval rates of over 90%, including if Russia ceases hostilities and attacks on critical infrastructure, and releases prisoners of war. Similarly high approval is seen for conditions such as Russia recognising Ukraine's sovereignty or withdrawing all occupying forces. The condition of Russia changing its political leadership receives comparatively lower support, although still large, with 77% in favour. There is also a mixed response toward international mediation versus direct negotiations, with 43% in favour of mediation and 24% opposed.

57% support negotiations without preconditions and 56% oppose the notion of no negotiations at all.

The openness to negotiations is tied to firm expectations regarding the conditions under which an end to the war is acceptable. Over 80% approve the conditions that Russia withdraws from all territories occupied since 2014, agrees never to strike Ukrainian land again and contributes substantially to the reconstruction of Ukraine, as well as that Kyiv receives credible security guarantees from the West. Unacceptable conditions include a reduction of Ukraine's military capabilities (rejected by 78%), or halting hostilities at the current frontline (by 71%). The following conditions are widely rejected: Ukraine refraining from reclaiming the four occupied oblasts (73% oppose), Russia withdrawing from all territories except Crimea (64% oppose),

or withdrawing only from those occupied since 2022 (61% oppose). These opinions are even more pronounced among younger people. Opinions on Russia receiving security guarantees from the West are split, with 39% of Ukrainians opposing and 34% supporting.

60% of Ukrainians believe that their country will emerge stronger as a result of the war.

Despite ongoing losses of terrain on Ukrainian territory over the past 12 months, 60% of Ukrainians believe that their country will emerge stronger as a result of the war. Only Russians perceive their country as even stronger (62%), while 56% of Ukrainians view Russia as weaker.

The way forward

A growing sense of hope is becoming apparent in response to the war. Some 66% express optimism about the future of their country, 52% for Europe and 46% for the world. Notably, younger generations are even more optimistic.

Among the global security problems that should be given priority, Ukrainians name terrorism (58%), closely followed by geopolitical tensions (53%, the highest value in the poll and a 12% increase since 2021). Human rights violations rank third (46%).

Military interventions are still rather opposed (52%), but the position has weakened (in 2021 63% were against). Russia's repeated threats of using nuclear weapons are met with strong opposition in Ukraine, with 88% rejecting their use.

Ukrainians are the most ambitious with regard to pursuing an active foreign policy (79%, the highest value in the poll). However, this seems to have the clear purpose of serving national interests as their stance on taking on international responsibility even if there are no direct benefits is more divided, with 43% in favour and 40% opposed. A strong majority of Ukrainians (82%) support reducing dependencies on countries that do not share their values. Nonetheless, 65% are willing to cooperate with any country, even those that do not share their values, if it promotes peace and security in the world.

Diplomatic negotiations are viewed as the most effective and legitimate foreign policy tool. While military interventions and economic sanctions are seen as similarly effective, economic sanctions are considered legitimate by twice as many people (75% vs 36%). To promote international peace, the most favoured approach is the improvement of defence capabilities (65%, the highest value in the poll), followed by intensification of diplomatic efforts (40%).

65% of Ukrainians advocate strengthening defence capabilities as a means to promote international peace.

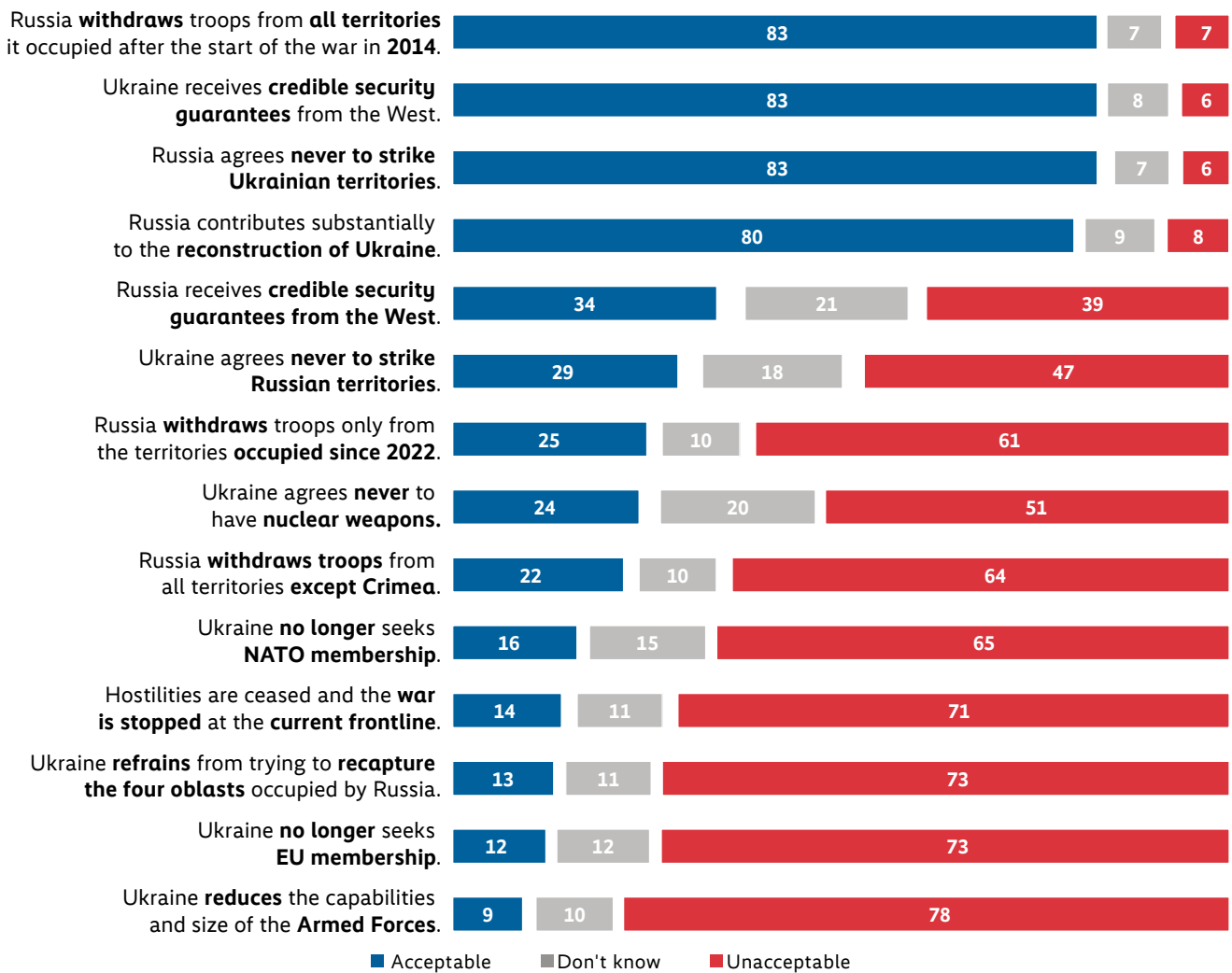
Ukrainian respondents express general dissatisfaction with the current policies of their country and the international community on climate change. While 44% favour taking all possible actions to combat climate change, 40% would prefer a focus on adaptation. The vast majority see climate change as a challenge to global peace and security and prioritise border security and international cooperation on

climate change. About 78% support the idea that rich countries should protect poor and vulnerable countries from the impacts of climate change.

As a country at war, perhaps unsurprisingly they show the highest support among the polled countries (77%) for increased military spending. This is evident in the fact that 61% prioritise defence spending over economic and social expenditures (20%), in contrast to the Russian side, where opinion is almost evenly split. A majority support funding defence through a special levy on the rich, while only 15% back cuts to social and economic spending.

At some point, the Russian war against Ukraine will end. Under which of the following scenarios do you find ending the war acceptable?

All figures in %



Deviations from 100% result from: 'no response'.

United Kingdom

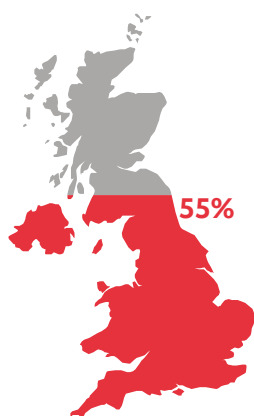
[re-orienting and engaged]

The United Kingdom has a long colonial history and is a nuclear power with global influence. It is one of the five permanent members of the UN Security Council and a founding member of NATO. It joined the European Economic Community (EEC) in 1973, later than many European neighbours, due to internal divisions and disagreements with France. In the wake of EEC accession, the United Kingdom faced internal and external challenges, including the Falklands War, the conflict in Northern Ireland and a fundamental financial and economic restructuring under Margaret Thatcher. The United Kingdom has taken on significant international responsibilities, particularly in Kosovo, Iraq and Libya. UK policies have been defined by its 2021 departure from the EU as a consequence of the 2016 Brexit referendum. In 2023, the UK updated its security strategy to adapt to a changing global order, signalling a more pragmatic foreign policy. The newly elected Labour Party is expected to have a positive impact on UK–EU relations.

Self-perception

The United Kingdom seems one of the most confident and secure countries in our sample. UK citizens seem to worry less: nearly half of respondents are not worried about their personal future, the lowest percentage in the survey. The overall level of concern is relatively low compared with other polled nations. Main issues that cause concern are inflation (83%), economic crises (78%), and wars and conflicts (78%). One outcome of Brexit seems to be that British people are the least worried about disagreements within the European Union.

A strong sense of security prevails, with 88% reporting feeling safe in their immediate environment. This figure is above average and is noteworthy in light of the new governments declared focus on safer streets.



The United Kingdom should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

British respondents feel most satisfied with the status of their country in the international arena.

British people feel most satisfied among the poll respondents with the status of their country in the international arena. Only 36% of respondents feel that the UK lacks the global status it deserves, the lowest percentage among the surveyed nations. This probably reflects the United Kingdom's historical influence as an imperial power with global reach.

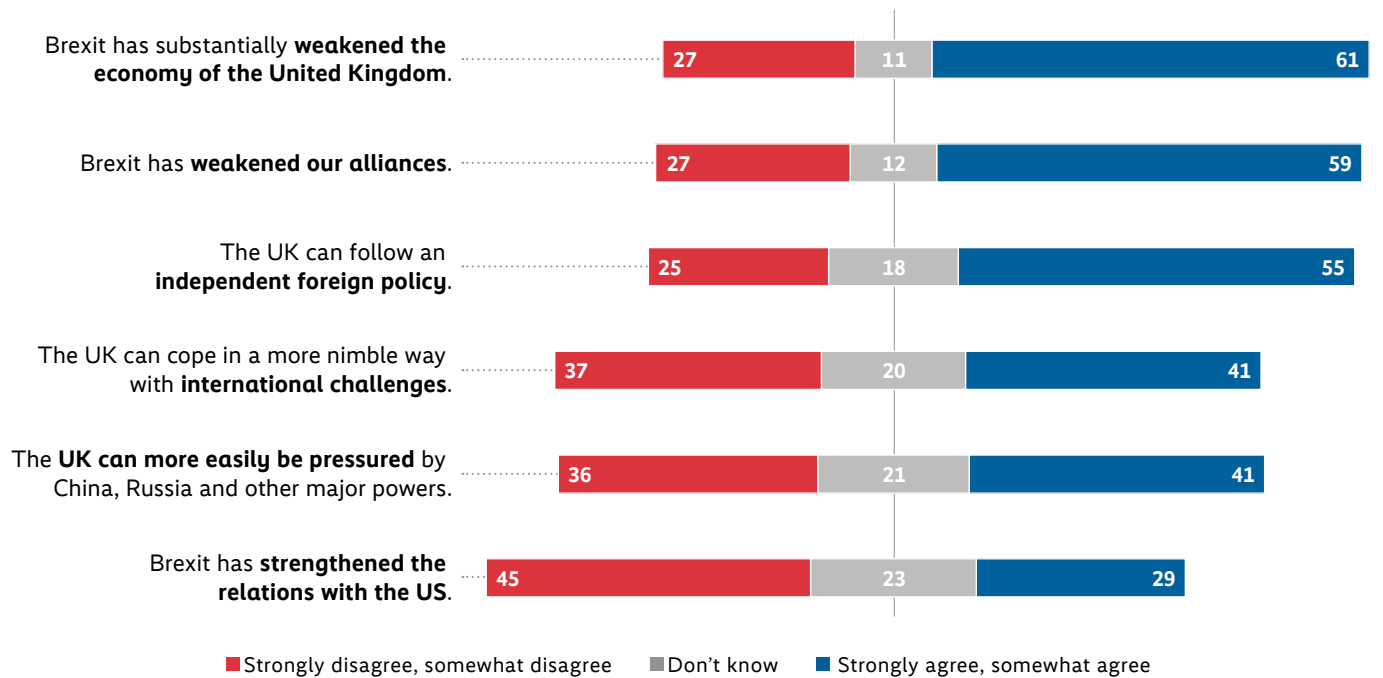
British people feel most satisfied among the poll respondents with the status of their country in the international arena. Only 36% of respondents feel that the UK lacks the global status it deserves, the lowest percentage among the surveyed nations. This probably reflects the United Kingdom's historical influence as an imperial power with global reach.

Perception of the world

A greater role is strongly desired for the UN, NATO, the OSCE and the EU. This willingness to engage in cooperation is even stronger among British men and younger people. The effects of Brexit were evident in the 2021 survey, but there has been a gradual shift towards rapprochement, driven in part by Russia's war against Ukraine. The EU is increasingly seen as a key partner and perceptions of conflicts of interest are diminishing (2021: 54%, 2024: 46%). The US remains central to the UK's foreign policy in the eyes of respondents, emphasising the special relationship between the two nations. Nevertheless, if the US were to withdraw from European security, many Brits would favour closer alignment with Europe.

How has Brexit affected the international role of the United Kingdom?

All figures in %



Deviations from 100% result from: 'no response'

Strong opposition to Russia is evident, with 67% expressing reluctance towards cooperation. This sentiment is less pronounced among younger respondents. Opposition to China is less evident (50%), but has increased slightly in recent years. Under Prime Minister Keir Starmer, the United Kingdom has adopted a more cautious stance towards China, aligning with the EU's de-risking approach.

Amidst uncertainties about the future and an unclear power balance, Britons foresee a new era of conflict, marked by a »my country first« mentality. Such an approach apparent during the Brexit period presents several challenges. Most respondents state that Brexit weakened UK alliances and the UK economy. Although 55% of respondents believe that the UK can follow an independent foreign policy, only 41% think the UK can react more nimbly to international challenges. However, most Britons reject the idea that the UK can be more easily pressured (41%).

Most respondents state that Brexit weakened UK alliances and the UK economy.

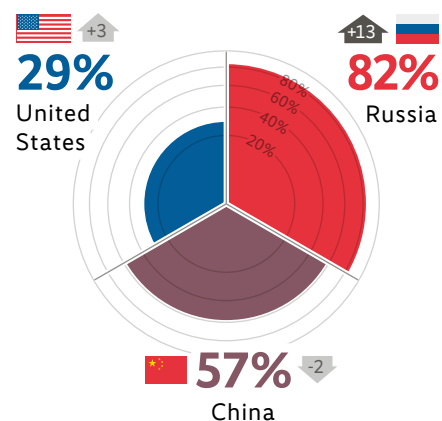
The perception of media reporting has improved. In 2021, the ratio of objective to non-objective reporting was 34% to 48%. By 2024, it had shifted to 45% to 35%, with young people increasingly perceiving media reporting as more objective.

Perception of European security

A shift is observable in the UK's defence strategy. Under the previous Conservative government's »Global Britain« approach, the EU was largely shunned as a security partner. However, the Russian war against Ukraine has demonstrated the need for a closer UK-EU relationship. The Labour government advocates for a new security pact between the UK and the EU, including enhanced collaboration with Germany, France and Joint Expeditionary Force allies. The UK has also joined the EU's military mobility project under PESCO.

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.

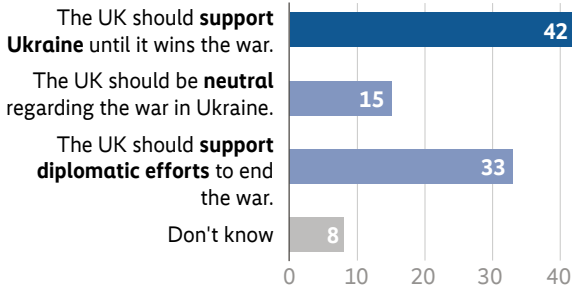


Combined responses 'strongly agree' and 'somewhat agree'

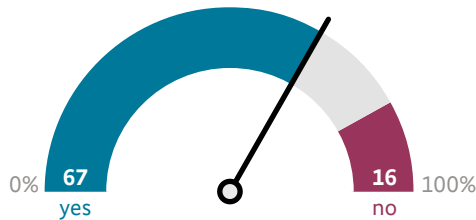
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should the United Kingdom take in the war in Ukraine?



Do you think it is necessary to keep supporting Ukraine?

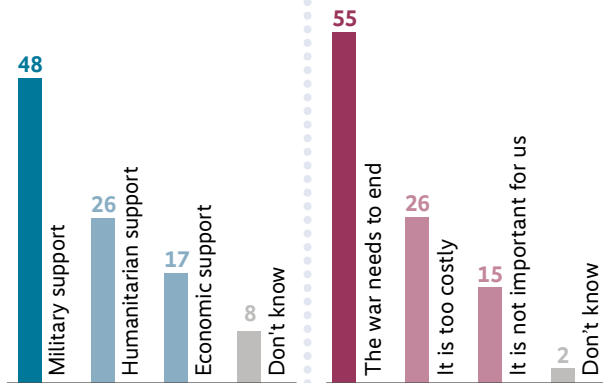


How should Ukraine be primarily supported?

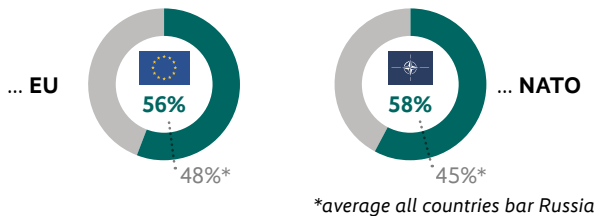
(Respondents who answered that Ukraine *should be supported*)

Why do you think Ukraine should not be supported?

(Respondents who answered that Ukraine *should not be supported*)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on the United Kingdom? Did it become...



73% agree on reducing UK dependency on countries with differing values.

Public opinion reflects this evolving stance: support for defence policy as a nation-state matter has decreased slightly to 50%, while approval for a European Army has risen to 43%. Leadership in European security is most entrusted to the trio of Germany, France and Poland. Russia is seen as the primary threat for Europe (82%), followed by 57% for China.

In the event of a Russian attack, only 34% believe the UK can properly defend itself. The EU is perceived as not too vulnerable: 42% agree and 39% disagree that the EU could defend itself even without US support. Maybe because of its so-called »special relationship« with the US, the UK shows comparatively low support for EU independence from the US (50%). NATO and EU enlargement towards the East are perceived as a threat by 43% and 41% of respondents, respectively.

Perception of the Russian war against Ukraine

The UK has long maintained a security partnership with Ukraine, providing NATO-standard training and military upgrades since Russia's annexation of Crimea in 2014. Russia is therefore seen as the clear aggressor. This reflects the willingness to push the boundaries in providing military aid, often ahead of other nations.

Support for Ukraine remains high at 67%, mainly through military aid (48%, thereof 60% men and 36% women), and for sending more weapons to Ukraine (49%). Younger respondents are more likely to favour economic and humanitarian aid. Support for sending troops is low, but ranks third highest in the poll at 22%. Approval for Ukraine joining the EU and NATO has notably risen, with a stable majority now for both memberships.

Despite this strong relationship and widespread approval of sanctions against Russia, there is no clear majority in the UK backing Ukraine until victory (42%), though the number is higher than the NATO average (32%). About a third prefer a diplomatic approach.

UK respondents perceive the war as being about territorial expansion (64%, 49% among those aged 18–29). Only a minority (16%) view it as a proxy war between Russia and the West, but men and people under 40 are twice as likely to choose this interpretation than women and older respondents. Russia is perceived to have been weakened by the war, while the other actors are rather seen as unaffected.

The way forward

Looking ahead, the UK's outlook is rather pessimistic, especially among women and increasing with age. A majority believe that global (54%) and European (39%) conditions will worsen in the next five years. Perceptions of the UK are more balanced, with 31% expecting a decline and 30% an improvement.

Given Britain's imperial past, citizens support enhancing UK's influence less than expected. For instance, while 60% of Britons support an active foreign policy, only 47% favour taking on greater international responsibility. The majority oppose promoting the country's own values abroad, with stronger resistance among older generations. An overwhelming majority (73%) agree on reducing UK dependency on countries with conflicting values.

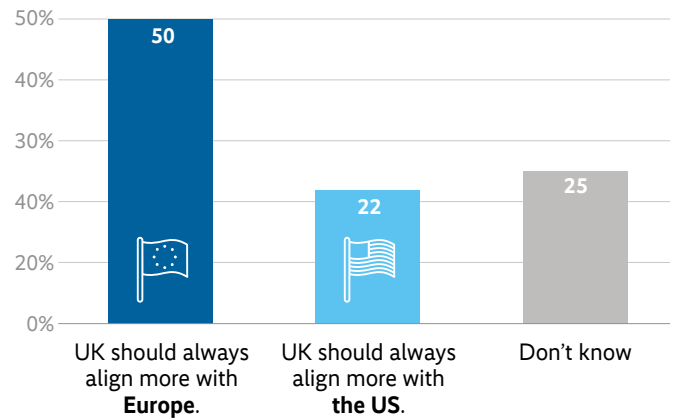
The respondents' top foreign policy priorities are combating terrorism and extremism (57%), followed by addressing climate change (44%) and resolving geopolitical tensions and conflicts (38%). Notably, concerns about geopolitical tensions and human rights violations have risen sharply since 2021.

Diplomacy is seen as the most effective and legitimate approach to resolving international crises. Support for international institutions is viewed as key to promoting global peace. As one of the five nuclear powers, the UK has a broad majority against the use of nuclear weapons, though it follows the US with the highest support for their use as a last resort (27%). Only about one-third of Britons favour military interventions in conflicts. Amid growing militarisation, it is noteworthy that 70% of the respondents still prefer to seek peace through diplomacy.

The UK has been a leader in international climate policy. While the Conservative government scaled back efforts, the incumbent Labour government aims to refocus on climate protection. Besides this, respondents are very satisfied with the policies in their country, particularly high

Imagine the US under a future president withdraws from European security. In this case, which future alignment would you choose?

All figures in %



Deviations from 100% result from: 'no response'

among people under 30. A narrow majority believe that the UK needs to take all possible actions to combat climate change. The UK shows the third-greatest support for the view that international collaboration is key to addressing global climate challenges. The UK recognises its international responsibilities, with a majority supporting the protection of poorer countries.

Overall, 56% of respondents support higher military spending, though 60% prioritise economic and social expenditure. Support for funding the military includes a special levy on the rich (42%) or cuts to social and economic spending (24%). Surprisingly, younger people endorse budget cuts most (33% among those under 30). New borrowing is very unpopular (5%). The UK meets NATO's 2% defence spending target but has not significantly increased its budget despite strong support for Ukraine since 2022. Therefore, the Labour government has committed to raising defence spending to 2.5% of GDP, though it has not yet specified a timeline for this increase. However, reducing the UK's debt relative to its economy and securing additional resources for defence and foreign affairs will be difficult without tax hikes or spending cuts.

Britons are very satisfied with the climate policies in their country.

United States

[confident and introverted]

The United States plays a pivotal role in European security, primarily through NATO and Article V of the NATO Washington Treaty. The latter guarantees that, should they come under attack, the United States will come to the European signatories' assistance. Alongside strong bilateral ties, the US also engages in the OSCE.

Transatlantic cooperation faced strains under Donald Trump's first administration. His so-called »America First« agenda weakened trust among US allies. President Joe Biden sought to rebuild that trust, focusing on supporting Ukraine against Russian aggression and containing China through allied cooperation. The upcoming Trump administration will probably revert to more transactional policies, including a reduced commitment to multilateral alliances. This raises serious concerns for Ukraine's defence and broader European security, as Trump could impose a joint China policy as a possible condition of security. With rising tensions involving China, a fractured US-Europe relationship would leave Europe more vulnerable.

Self-perception

Americans appear more secure, as their overall level of concern is relatively low compared with other polled nations. Having said that, their prevailing concerns are economic crises (76%), wars and conflicts (75%) and cyber-attacks (at 71%, higher than the survey average of 64%).

Americans appear most satisfied regarding their country's international standing. Only 38% feel that their country does not have the status it deserves, while 47% believe it does. Some 61% perceive their well-being as linked to the prosperity of other countries, showing an increased understanding of interconnected global prosperity (2021: 54%).

Perception of the world

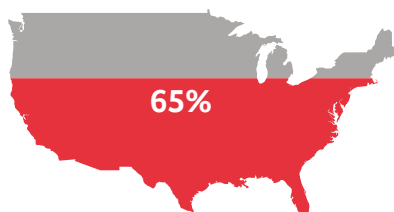
Americans exhibit moderate support for multilateralism, a slight improvement on the last survey. A majority support a stronger role for the UN (57%), NATO (53%, but only 42% among those aged 18–29), and the EU (46%). But although 36% support a bigger role for the OSCE, 16% answer 'don't know' and 30% admit to being unfamiliar with the organisation.

71% of Americans wish to reduce dependence on China, compared with **53%** on average in polled EU countries.

Americans believe that the age of American supremacy may be over (43% agree, 39% oppose). Most polled countries agree, except for outliers such as Georgia (54%) and Ukraine (52%), who still believe in it. Americans appear to anticipate an era defined by wars, conflicts and a »my country first« approach. Confidence in laws and rules in international relations persists, with only 38% professing to believe that they are no longer relevant (much lower than the 47% survey average).

In the international context, the US compared with the EU sees itself as engaged in a broader conflict with both Russia and China. US–Russia (57%) and US–China (53%) relations are perceived as characterised by contradictory interests, followed by EU–China (43%). However, Americans' perceptions of these contradictions appear to be less pronounced than those of other respondents.

Russia perceives the US as its main adversary. These days, however, the US does not reciprocate this view, instead focusing on China, particularly in economic terms. For instance, there is a strong US desire to reduce dependence on China, even if it negatively impacts living standards (71%, one of the highest values in the survey). The average of polled EU citizens is much lower at 53%. At the same time, support for closer cooperation with China increased among American respondents, rising from 30% in 2021 to 40%. Tensions and structural challenges define US–China relations: on average, 54% of Americans and 53% of respondents in our 14-country sample fear a new Cold War.

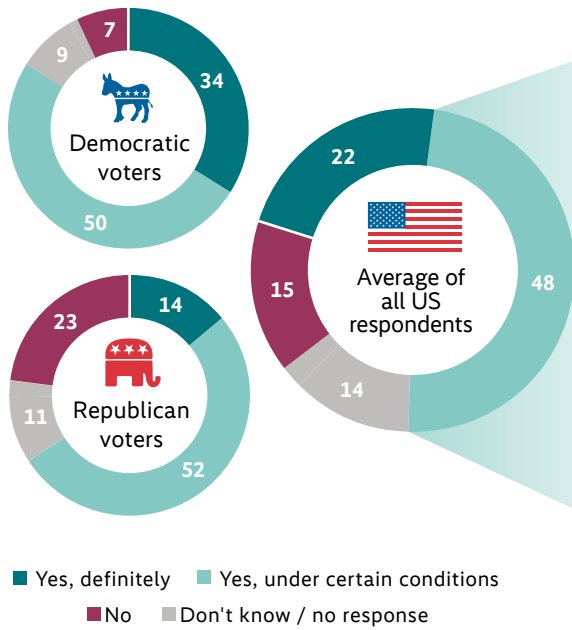


The United States should concentrate on its own well-being and try to avoid international involvements.

Combined responses 'strongly agree' and 'somewhat agree'.

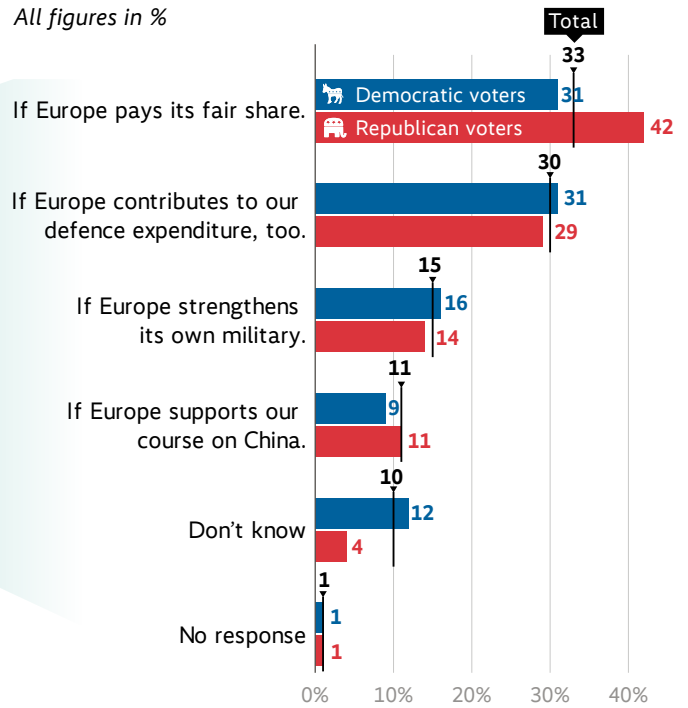
Should the US continue providing security for Europe?

All figures in %



Under which conditions?

All figures in %



The Biden administration has struggled to rally European allies behind its China policy, and as already mentioned, the Trump administration may link support on this issue to American participation in European security.

When it comes to Russia, Americans demonstrate a more pragmatic perception. Closer cooperation is rejected by 53%, but 31% (above the NATO average of 25%) favour it. Nevertheless, 68% desire to minimise dependence on Russia.

Fears that broader global conflicts may impact the US remain high. Some 77% of Americans express concern about a direct impact of wars on their country, and 41% (above the 32% survey average) are worried about a new world war. Americans view themselves as highly capable of

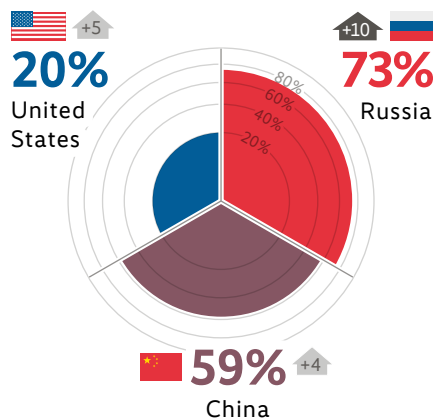
defence in the event of a Russian attack, with 70% expressing confidence, much higher than the 28% average.

70% of Americans view their country as highly capable of defence in the event of a Russian attack.

Perceptions of media reporting are split, with 39% seeing it as biased and 37% (2021: 31%) as objective. America's media landscape is politicised and polarised. Media outlets have long reflected partisan divides, including greater influence of billionaires. This is partly reflected in perceptions of objectivity, which are significantly stronger among Democrats (48%) than among Republicans (31%).

This country is a threat to peace and security in Europe.

Figures in arrows indicate change compared with 2021.



Combined responses 'strongly agree' and 'somewhat agree'

Perception of European security

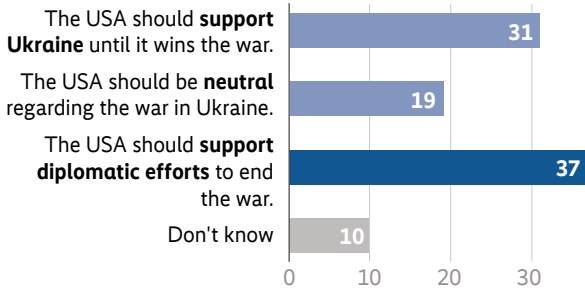
With President Biden fostering closer ties, the US and the EU have strengthened their transatlantic security partnership. Public opinion reflects broad support for closer cooperation with the EU. However, future dynamics under president Trump remain uncertain.

When it comes to European security, Russia is seen as the primary threat (73%). But US respondents' perception of the Chinese threat (59%) is significantly higher than the 44% EU average. Some 40% of Americans view NATO enlargement as a potential threat to European security, a substantially higher proportion than before Russia started its full-scale war against Ukraine (2021: 28%). Only 36% perceive EU enlargement towards the East as a threat.

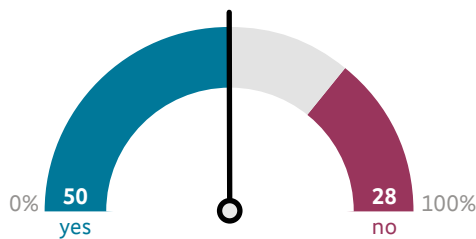
War against Ukraine

All figures in %. Deviations from 100% result from: 'don't know' or 'no response'.

What position should the United States take in the war in Ukraine?

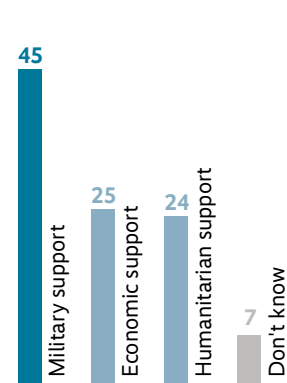


Do you think it is necessary to keep supporting Ukraine?



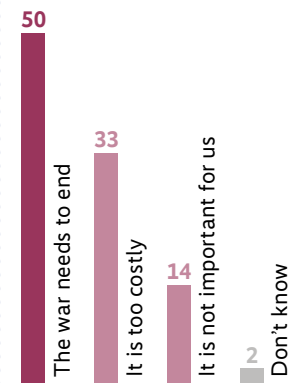
How should Ukraine be primarily supported?

(Respondents who answered that Ukraine *should be supported*)

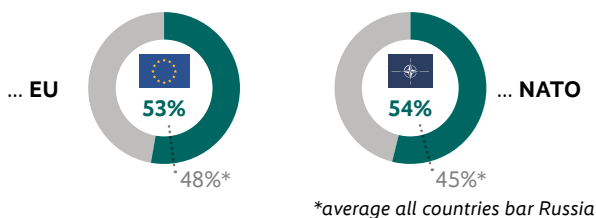


Why do you think Ukraine should not be supported?

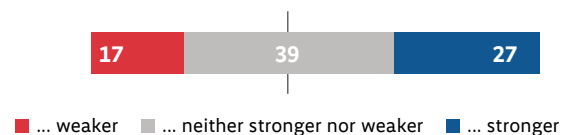
(Respondents who answered that Ukraine *should not be supported*)



Should Ukraine become a member of...?



What effect, if any, does Russia's war against Ukraine have on the United States? Did it become...



44% endorse providing additional weapons to Ukraine, thereof **60%** Democrats and **35%** Republicans.

The US has long advocated that Europe should step up its responsibility for its own defence. In line with that, Americans have more confidence (41%) in Europe's defence capabilities without US involvement than the European average (31%). Notably, however, 71% still support continuing US provision of security for Europe. Some 48% cite conditions, such as a fairer financial contribution from Europe (33%) and direct European support for US defence expenditures (30%), but a mere 11% cite European support for US China policy as a condition. Support for an EU Army has also surged, increasing from 39% in 2021 to 52%. This may reflect the wish that Europe take care of its own defence. Support for the EU's role in promoting international peace through non-military means, such as diplomacy, has risen from 56% in 2021 to 63%. In EU security policies, Americans favour leadership by the Weimar Triangle of Germany, France and Poland (35%), but a notable 25% answer 'don't know'.

Perception of the Russian war against Ukraine

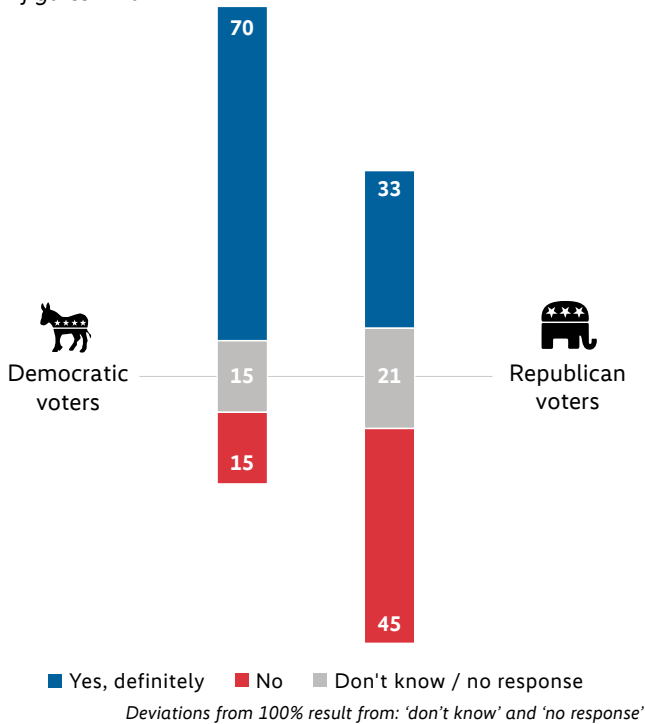
Since February 2022, Washington has led support for Kyiv and strengthened NATO's deterrence capabilities. The US has been the major provider of military aid to Ukraine and crucial in coordinating NATO's response.

The majority of Americans hold Russia responsible for the war, which over half believe is aimed at expanding Russia's territory. Overall, in accordance with the NATO average there is support for further aid to Ukraine, with 50% of Americans in favour (although while 70% of Democrats are on board, only 33% of Republicans follow suit). Furthermore, 37% of Americans would prefer a diplomatic solution, 31% favour aid until victory for Ukraine, and 19% favour a neutral stance.

Providing additional weapons to Ukraine is endorsed by 44% (60% Democrats, 35% Republicans), the third-highest value among polled NATO countries. Notably 23% are in favour of sending troops, a level of support surpassed only by Sweden (27%).

Do you think it is necessary to keep supporting Ukraine?

All figures in %



Economic and humanitarian aid each receive support from just under 25%. Support for Ukraine's integration into NATO and the EU has increased significantly, with approval for NATO membership rising from 38% in 2021 to 54%, and for EU membership from 37% to 53%.

Diplomacy is seen as the most likely path to ending the war, with 35% expecting a negotiated settlement, while 25% foresee no end to the conflict. However, 36% believe it is most important to stop the war even if it means Ukraine losing control of some areas to Russia. Some 31% support continuing the war to restore Ukraine's territorial integrity. Meanwhile, 12% consider it most important that Russia lose the war, even if it means a risk of escalation.

Among Americans, there is notable optimism that the war will end within the next 12 months, second only to Russia.

The way forward

The outlook for the next five years appears less bleak than in 2021, with expected improvements in the US (41%) and in Europe (31%). Only regarding global developments does pessimism (38%) exceed optimism (30%).

The main thrust of public sentiment is towards domestic affairs. Americans therefore remain cautious about taking on more international responsibilities, with only a slight increase in support under Biden from 38% in 2021 to 42%. However, support for reducing dependency on states with different values is notably high at 71% and has increased

significantly (2021: 51%). Although 65% prioritise their own well-being over international involvement, 57% support an active foreign policy.

Foreign policy priorities are fighting terrorism and extremism (57%), addressing human rights violations (43%), tackling climate change (39%) and resolving geopolitical tensions (31%, well up from 18% in 2021). When asked about strategies for promoting peace, Americans favour international institutions (38%), diplomatic efforts (36%) and promotion of economic interdependence (33%, the highest value in the poll). Isolationist sentiments are reflected in preferences regarding the future focus of US foreign policy, but without significant changes compared with 2021. Most respondents prefer limitations on US involvement (29%), followed by a focus on China (15%), Europe (14%) and the Middle East (12%). However, a significant portion (23%) responded 'don't know'.

A worrying 12% believe that no action is needed on climate change, second-highest value in the poll after Russia.

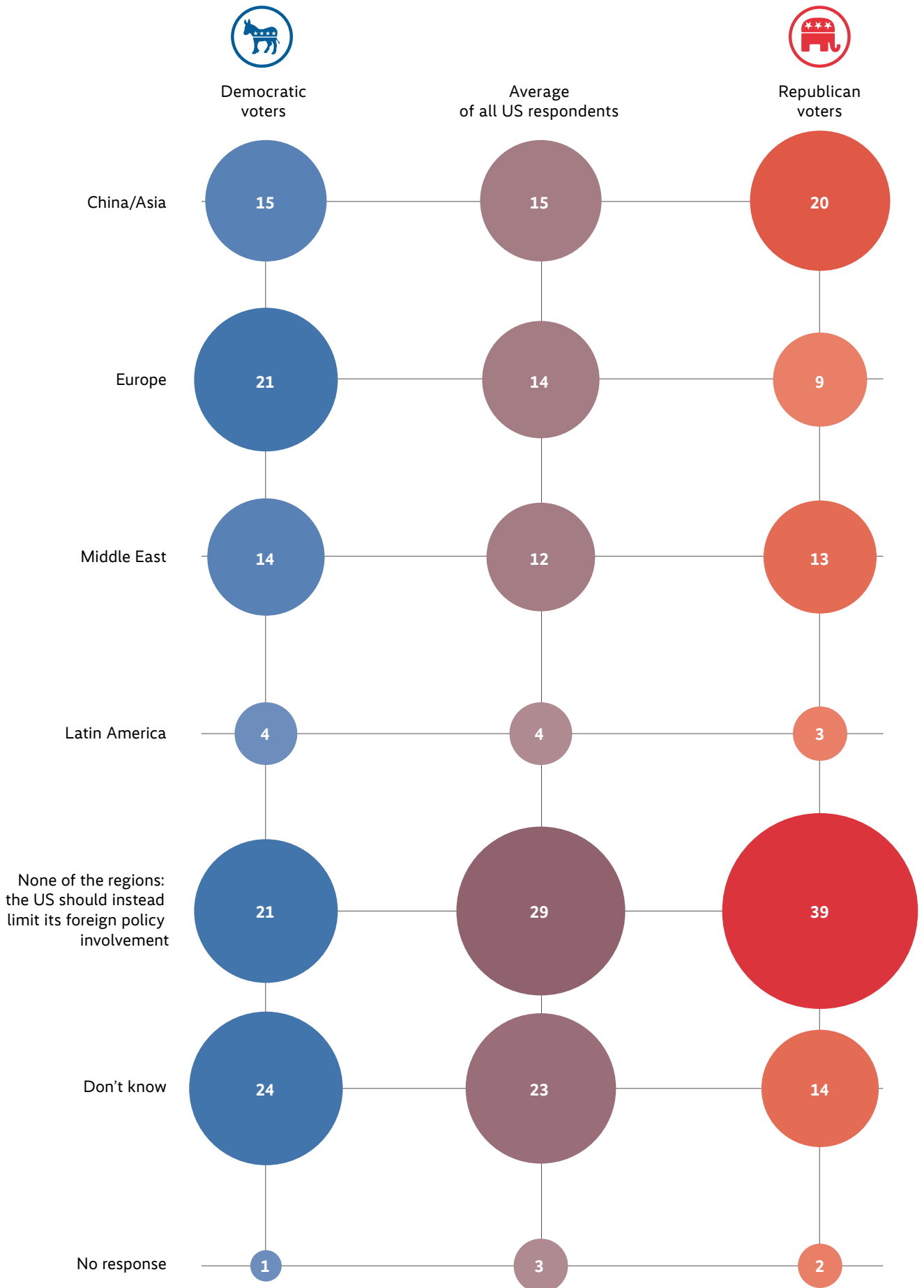
Diplomatic measures are seen as effective and legitimate, though the US has the lowest legitimacy rating. Public opinion is divided on military interventions (43% opposed, 41% in favour), with support higher than average (30%), similar to Sweden and Türkiye. Attitudes towards nuclear weapons are concerning: 57% oppose their use, the lowest among polled countries, while a worrying 36% would agree to their use as a last resort.

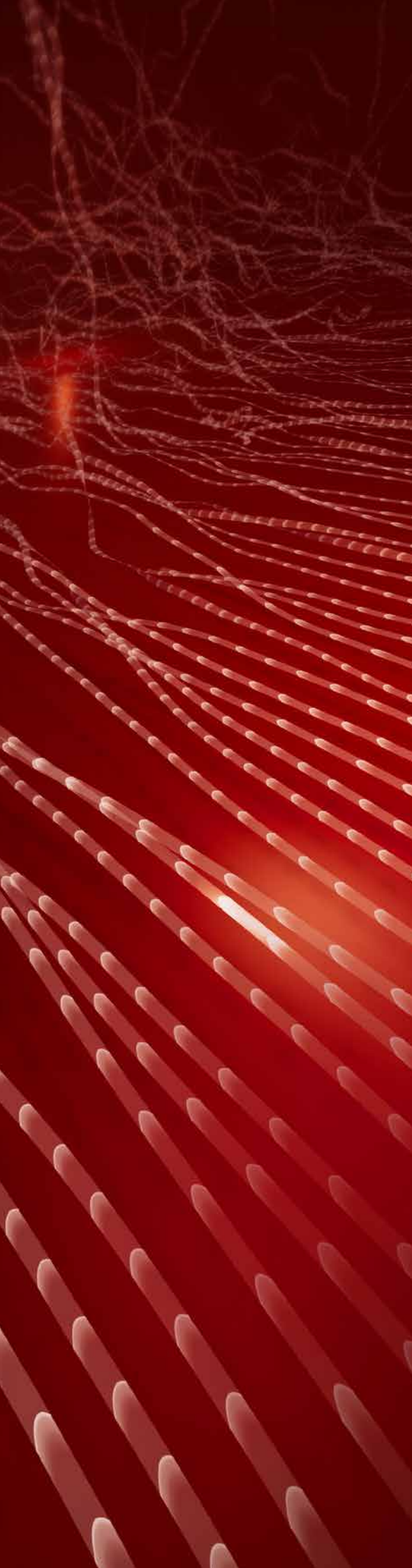
Climate change remains a critical concern, especially because the Trump administration seems intent on withdrawing from the Paris Agreement once again. The majority are dissatisfied with domestic and international climate policies, but more satisfied than average. Almost 50% favour doing everything possible, while 29% prefer adaptation. However, a worrying 12% believe that no action is needed on climate change, the second-highest value in the poll after Russia (26%). While 68% view international collaboration as essential to address global climate change, 59% prioritise securing borders amid potential instability. Despite their national wealth, Americans are among the least approving of support for poorer nations.

Raising military spending has gained stronger endorsement, from 40% in 2021 to 48%. Some 55% would prefer to fund social and economic affairs over defence (29%). Funding preferences include a special levy on the rich (36%). Another 32% favour cuts in other budgets, one of the highest figures in the poll, raising concerns about social programmes and services.

Where should the main focus of US foreign policy involvement lie?

By party preference. All figures in %





Conclusions

Conclusions

We are currently immersed in a time of constant sorrow, and people feel dogged by misfortune. This is true of all the 14 countries surveyed. The ongoing polycrisis, which has been with us for roughly a decade, has made a deep impression. People across the OSCE area are extremely worried about the future. Inflation, general economic insecurity, wars and conflicts are their main concerns. Russia's full-scale war against Ukraine is the culmination of this era so far, adding fears of new wars in Europe, as if there wasn't enough to contend with already. This sense is shared throughout our sample. These common worries go hand in hand with the perception of a world characterised by zero-sum logic, great power competition and an increasing focus on national interests. Existing fractures along great power lines, with the US and China being the main poles and the EU and Russia playing second fiddle, are part and parcel of this worldview. People almost inevitably feel an urge to concentrate on national affairs and decouple from countries with differing values.

Dangerous world

Russia's full-scale war against Ukraine has led to a perception in Europe of a shift in the tides of international politics. The Russian attack in February 2022 added open war in Europe to the geopolitical mix and a Rubicon was crossed for Europeans. From a broader perspective, the war came on top of other developments affecting all 14 surveyed countries: growing tensions between China and the US, attempts at de-globalisation in the wake of the pandemic, the rise of influential international actors such as the BRICS countries or Türkiye, the growing influence of populists and complex dynamics in the Middle East. For some countries in Western Europe, the Russian war has been a belated wake-up call.

Great powers struggling for influence are clearly back on Europe's agenda. The evolving conflict between the US and China, sometimes referred to as a new »Cold War«, serves as the new ordering principle in this world, gradually replacing US hegemony. The relative loss of US power is perceived quite strongly in the US itself, although some of its staunchest allies still take a different view. This generates even more uncertainty, however, as Washington is not expected to give up influence without a fight. The return to power of the MAGA camp can be interpreted as a doubling down on reclaiming the United States' unique position. In fact, the early statements of President Trump on Canada,

Greenland or Panama could be read as a US adaptation to raw power politics and a rather blunt attempt to maintain relative superiority over China. In comparison to the more cautious and incremental steps of the Biden administration with its focus on allied unity and stopping Russian violations of international law in Europe, this has the potential to lead to further conflicts.

The Russian war against Ukraine is perhaps the starkest manifestation of these developments in Europe and impossible to ignore. It is the time of monsters as Antonio Gramsci described it. The old order is dead, the new yet unborn. In this interregnum the fundamental changes taking place evoke a sense of danger. Many decision-makers in this situation reach for the current default option of competition or even confrontation, seemingly oblivious to the possibility that this could be a slippery slope to more conflict and turmoil in the long term. It remains to be seen whether guardrails or stabilising elements can be established in an environment characterised by uncertainty, fear and polarisation.

Three observations stand out in relation to Russian's war against Ukraine:

First, the polarisation between Russia and the West is entrenched. The countries that form part of the »support coalition« for Ukraine perceive Russia as a threat and aim to distance themselves from it. This is not the case for the rest of our sample, however. And even inside the »support coalition«, as well as inside every country individually, particular patterns may be observed. The five camps we identified in relation to Russia's war against Ukraine – the »Determined«, the »Reluctant«, »Russia's Friends«, the »Opportunists«, and the »Unaffiliated« – have quite different strengths in the respective survey countries and have shaped their policies in the past three years. The different composition of the camps inside the respective countries underline why the narrative concerning support for Ukraine needs to be country-specific and idiosyncratic, addressing the specific issues that characterise national discourses.

Second, the Russian government is on a confrontation course with »the West« and both sides tend to perceive one another as enemies. Nonetheless, public sentiment concerning security, fears and concerns in Russia is quite similar to that in the other OSCE countries. Unifying elements between Russians and their peers persist, as Russians continue to see themselves as part of

The Determined

Some 24% support weapons deliveries to Ukraine and are opposed to cooperation with Russia. These respondents are most numerous in Sweden, but also in Latvia and the United Kingdom.

The Reluctant

Around 24% of all respondents oppose both closer collaboration with Russia and weapons deliveries to Ukraine. These people represent considerable minorities in most countries and are particularly prominent in Italy, Poland and Georgia, and to a lesser degree in Germany and France.

The Opportunists

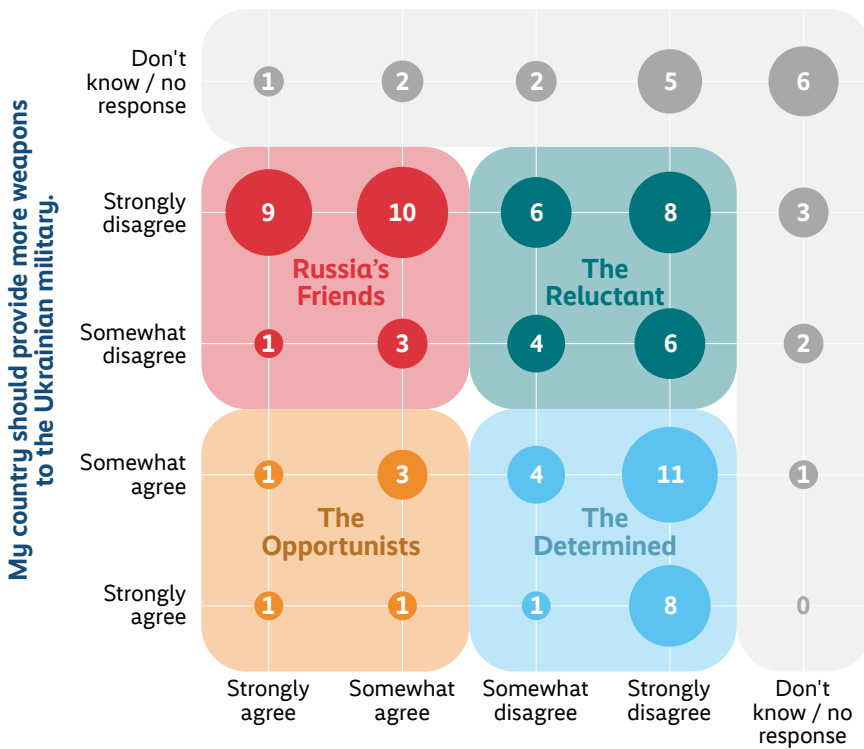
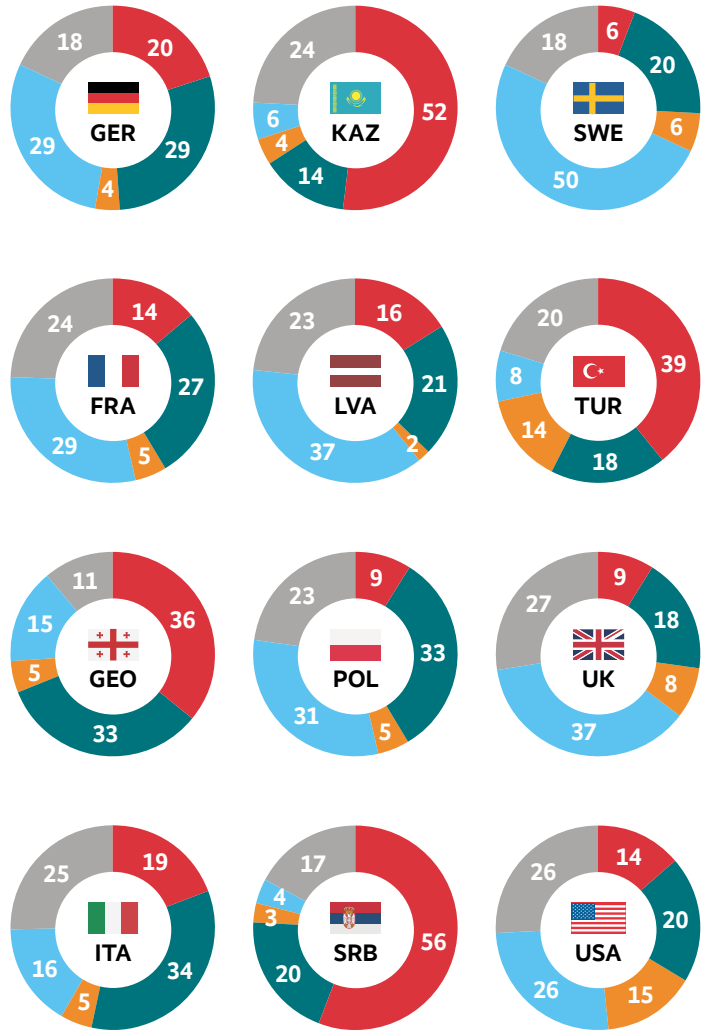
Some 6% of all respondents support, somewhat counterintuitively, closer cooperation with Russia and weapons deliveries to Ukraine. These people represent only a small minority in all countries, but are quite prominent in the United States and Türkiye.

Russia's Friends

Around 24% of all respondents would like closer collaboration with Russia and oppose weapons deliveries to Ukraine. These people are found mainly in Serbia, Kazakhstan and Türkiye, but also in Georgia.

Unaffiliated

Some 21% responded 'don't know' or did not respond to one or both of the questions in the matrix and were coded as unaffiliated. This cluster is equally present in each of the 12 countries; it is markedly smaller in Georgia, probably because the survey was conducted via telephone.



How do respondents relate to Russia and Ukraine?

To answer this question we put responses from 24,636 respondents from 12 countries (14 countries minus Russia and Ukraine) in a matrix. It depicts a cross-tabulation of two issues: whether to provide more weapons to Ukraine and whether to collaborate more with Russia. Respondents fall into five clusters. Four of them are almost even, each covering slightly less than a quarter of respondents; one is very small.

Due to roundings, figures may not add up exactly. All figures in %

My country should collaborate more with Russia than before.

the European cultural sphere. This does not mean that they agree on key questions of European security, especially the war against Ukraine, however. Here even the parts of the Russian society that are more critical of their own government have positions significantly different from those of their peers in other countries. Interestingly, the Russian public still makes a difference inside »the West« between the United States (seen as the »main adversary«) and the EU (regarded much more benevolently).

Third, and most worrying: In the countries in Ukraine's support coalition the war has become somewhat normalised. This implies that war in Europe has lost its »exceptionality«, evolving to become an element of sometimes cynical domestic political struggles, as seen in the US elections. As a result, there are low expectations of a Ukrainian victory, sinking public support for continued assistance, and a sense of numbness with regard to the atrocities taking place on a daily basis in Ukraine. Analysis of the different camps inside the respective societies shows that the »Determined« camp is in a minority position even in some NATO states, while the »Reluctant« and »Russia's Friends« taken together are generally in a majority. Consequently, there is a uniform desire for negotiations, albeit with different motivations and aims.

Related to these observations three more fundamental questions arise:

1. How can countries and societies adapt to an era characterised by war and violent conflict? Most governments have decided to boost their defence budget, with broad public support. How does this affect the availability of funds for social spending, burden-sharing between different parts of society, people's sense of fairness and social cohesion? This affects mainly countries with a high living standard, where people are afraid of losing out.
2. What is the current salience of international law and rules? How can these be upheld under the circumstances of war and great power struggles? The tension between the ideal and the achievable becomes painfully obvious in the case of Russia's war against Ukraine. Many people would like Ukraine to win the war, but they don't want to become directly embroiled in it and potentially compromise on their own security. How, in a time of scarce resources, can this circle be squared?
3. Is there an ideal balance between confrontation and cooperation? Can decoupling from the non-aligned and collaborating with the like-minded offer a solution? And what effects might this have on common challenges such as the climate crisis or nuclear proliferation? This question is even more pressing for countries such as Kazakhstan and Georgia, which are geographically located on geopolitical fault lines.

Contradictory coping strategies

People's ideas on how this geopolitical world should be navigated are at least partly contradictory. Perceptions of an ever more competitive and dangerous world tend to make people more inward-looking, especially in richer countries that are members of the EU and/or NATO. In tandem with this, there is an impetus to decouple from countries that are deemed inimical or out of line with common values. Pragmatism or even opportunism are complementary to this, resulting in foreign policy and international relations guided by a clear transactional agenda focussed on very narrow national interests.

On the other hand, although to some extent incompatible with the other coping strategies, the strengthening of international organisations is also deemed useful. Cooperation between states to pursue a higher goal, whether it be peace and security or planetary challenges such as the climate crisis, is still seen as necessary. There is an expectation that international organisations can alleviate some of the pressures of the current situation. In the cases of the EU and NATO this entails cooperation among the like-minded, at least on paper. But although in theory these organisations' member states share the same basic values, differences between governments prevent them from acting more effectively. The focus on narrow national interests thus leads to an organisational impasse. This phenomenon of »enforced organisational inertia« is even more pronounced in organisations that include member states that are not like-minded, such as the OSCE or the United Nations. The gap between these organisations' capabilities and people's hopes about their role is thus widening.

The United States at a crossroads

The decisive role the United States has played in Europe could change fundamentally in the coming years. A popular desire to withdraw from international affairs and concentrate more on American interests has been apparent for a number of years. With the second Trump administration, the most isolationist and »America First« political faction has come to the fore in US society. Bearing the costs of being the global hegemon is more and more contested in the US. Nonetheless, the advantages of this position are still highly attractive. Maintaining an edge against key competitors, specifically China and to some extent also Russia, remains part of Washington's foreign policy agenda. This is nothing new, but what might represent a major break with the past are the tools used to achieve hegemonic status. Previous administrations have acted more or less as *primus inter pares*, taking a multilateral approach, acting at least partly within international organisations and applying gentle persuasion to allies. President Trump is set to deviate from that, using mainly bilateral, sometimes even coercive approaches, demanding blind support and side-lining international organisations, thereby rendering them impotent.

The EU – »a Schrödinger’s great power«

The European Union as an international organisation sui generis is in a particularly difficult position. Its economic weight and the combined military resources of the EU member states make it objectively a great power, and it is often regarded as such from the outside. In a more globalised world, the EU is perceived as a union of the like-minded, potentially on a par with the US, Russia or China. From the inside, however, the picture is starkly different. The EU is not a nation-state and thus is not experiencing the turn inwards taking place in many countries at national level. Differences between member states have led to a number of conflicts and fissures in the recent past, underlining the perception that the EU is currently unable to act decisively in critical circumstances. Europeans themselves are therefore rather sceptical about the ability of their own union to navigate successfully a world marked by geopolitical competition.

What to do? Policy recommendations

The times they are a-changing. The maelstrom of geopolitics, the logic of zero-sum games, power struggles and competition threaten to take Europe down a dangerous path. Decision-makers therefore need to tread carefully to maintain what is left of European security and lay the basis for improvements without delay. Such actions are needed at different policymaking levels and have differing timelines.

Strength starts at home



The basis for successfully managing the current crises lies within. However, the framing of international relations as »democracies vs autocracies« risks losing the substantial parts of European electorates who are disenchanted with democracy and feel it has delivered little for them lately. Security encompasses not only defence, but also democratic resilience and economic security. It is built on strong and cohesive societies. Strengthening social cohesion thus represents a sustainable investment in societies’ ability to navigate the upcoming challenges that go hand in hand with a polarised and even hostile international environment. Resilient democracies, trust in institutions and a vision of the future are therefore as important as military equipment when it comes to upholding security in Europe.

Current efforts to increase defence budgets are supported, but still met with concern by broad swathes of society who fear for their livelihoods. Populists have been able to exploit such concerns in recent elections. Social cohesion should thus also become the main avenue for strengthening democracies and winning back the disenchanted parts of the electorate by showing them that democracy still delivers for them in practice. The necessary strengthening of defence capabilities in democracies thus requires a careful calibration so as not to throw out the baby with

the bathwater and undermine democratic foundations from within. A first step towards fairer burden-sharing could be the introduction of an EU-wide special levy on the rich to finance defence spending. Such a measure is widely popular across our polled countries.

Take Europe seriously



The European Union still has enormous soft power. This gives it a promising foundation on which to play a stronger role even in more hostile international surroundings. The EU’s appeal is very high, especially with young people in Europe’s broader neighbourhood. This needs to be nurtured by doubling down on programmes aimed at building relations, such as Erasmus Plus. Additionally, the EU is far better able than single member states to play economic hardball, when it comes to erecting (or counteracting) trade barriers or setting standards. However, the EU’s main strength lies in its unity. If the logic of competition and confrontation spills over inside the EU, it could lead to the paralysis of the union and consequently an even weaker position for its member states. Therefore, any action the EU takes should be used in a coordinated manner. Otherwise member states risk being outplayed, while still trying to outfox their direct EU neighbours and partners.

More specifically, current combined EU defence expenditure already puts it far ahead of Russia in the global top three. Better European cooperation and coordination in defence matters can serve multiple purposes for European security. Spending together in Europe will strengthen defence without constantly putting a strain on budgets. Moreover, allocating defence contracts to European producers can generate growth within the EU, contribute to economic development and ease dependencies on foreign producers. Finally, in the current environment of ever-increasing defence budgets and related risks of an arms race, a prudent EU policy could pave the way to re-establishing elements of arms control and decelerating the current spiral of defence expenditure.

Cooperative security is a necessary stabiliser



As the example of the EU shows, there is enormous potential in international cooperation as a means of coping with current challenges. However, the idea of cooperation runs counter to the current Zeitgeist, which favours competition and even confrontation. Nonetheless, cooperating even when interests only partially overlap is the essence of international organisations. This applies even more to organisations that bring together non-likeminded states. Cooperative security might not currently be in vogue, but it remains a necessary stabilising element in a world on the brink of disorder.

The prevalent geopolitical logic of competition and confrontation needs to be stabilised with pragmatic cooperation. The establishment of peace in Europe, as well as fighting climate change and its consequences are two aims for which it would be well worth overcoming our differences. Common ground might be shaky, fragile and even potentially explosive. Nonetheless it's necessary to explore overlapping interests. For this purpose, all participating states sometimes need to bite the bullet, try to find common denominators and address common topics. Cooperative security crucially requires a shared understanding of what security means for all parties involved. Organisations such as the OSCE or the UN can serve as vehicles for working out such a shared agenda and may even be able to find their purpose again.

Prioritise ending the war against Ukraine



The war against Ukraine is mired in a period of attrition. Both sides still seem to be pursuing maximalist agendas. Escalation is still a danger, although some in the support coalition for Ukraine seem fairly content with the continuation of the war. However, this will only lead to further bloodshed and deepen the hostility between the two countries. It could also feed into existing war fatigue in the West and thus tip the balance in Russia's favour. The danger of a so-called »forever war« in the EU's direct neighbourhood looms, with more and more countries tiring and cutting support as a result either of changes of government or a failure to muster the necessary resources. We already see that a considerable proportion of citizens of countries in the support coalition, when asked, declare they are against sending more weapons to Ukraine.

Current momentum provides an opportunity for change. There is considerable popular support for negotiations within Russia and Ukraine. At the same time, the position of the United States would seem to have shifted significantly as Donald Trump returns to the White House.

In addition, both war parties have incentives to negotiate. Russia and Ukraine are both »losing the war«, although Ukraine more quickly than Russia. Ukraine is losing ground, has huge difficulties in recruiting enough personnel and faces obstructions in the continuation of weapons supplies. Having said that, Russia may have reached the peak of its military power as sanctions bite ever deeper and recruitment becomes increasingly an uphill struggle. This does not mean that Putin is likely to give up, however.

Policymakers need to take steps towards ending the war and commencing negotiations. Two elements can guide this process. First, the Western support coalition should abstain from overloading its approach with grandiloquent narratives such as »democracy vs autocracy« or »a fight against imperialism«. This approach has failed to win broader global support. Indeed, it has even induced many countries outside the Western coalition to criticise such rhetoric as »double standards« or even »hypocritical«. Instead of trying to find a rather tenuous moral high ground, the focus should be on the most obvious consideration, shared by far more countries than the support coalition, namely the fact that Russia is breaking international law. This can be a rallying call for countries beyond the Western coalition and bring a more diverse group of states into the process, thereby increasing pressure on both parties to come to the negotiating table. Second, the key issue in the negotiations should be Ukraine's long-term sovereignty. The definition of victory, on which hitherto different parts of the coalition have been at odds, needs focus. It should concentrate on the fact that Ukraine has withstood Russia's onslaught and has asserted itself as a sovereign state. Our poll shows that this condition is potentially acceptable even to a sizeable portion of the Russian public. Maintaining and securing this sovereignty in the long term needs to become the common agenda of Kyiv and its partners. It encompasses Ukraine's ability to defend itself and deter further Russian attacks, to govern the country independently of outside influence, and, if it so chooses, to integrate into the European Union.

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Security Radar 2025



Security Radar 2025 builds on a representative public opinion poll conducted in 14 countries. It takes stock of threat perceptions, attitudes to domestic and multilateral institutions, foreign policy priorities, as well as to foreign policy instruments, highlighting core issues for European security, such as the ongoing war against Ukraine.



Europe is in danger. People feel afraid. Some 80 years after the Second World War, geopolitics have once more morphed into armed conflict on our continent, claiming lives daily in Ukraine. Russia's full-scale war has resurrected the ghosts of Europe's past we hoped had been put to rest long ago. The logic of confrontation seems to be the new normal.



Despite the current trend towards competition and confrontation, we maintain the importance of cooperative approaches in international security. Including such thinking within the framework of confrontational approaches will be needed for stabilising European security, as well as for tackling planetary challenges affecting us all, first and foremost climate change.

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