

[Download the full PDF of our exclusive survey.](#)

In a context of war in a Union border nation, increasing international tensions, and uncertainty around military alliances, Cluster 17, in partnership with le Grand Continent, set out to gauge European public opinion.

In this unprecedented moment, we felt it was crucial to understand how Europeans are reacting and whether they felt they had common interests and a shared destiny.

Even though national surveys on nearly all areas and current issues — even secondary and sometimes even trivial ones — are commonplace, it is surprising to see that there are almost never any surveys of “Europeans” as a group with the aim of forming a single political community. At a time when the question is being raised as to how the Union can equip itself with the means for a common defense, we felt that knowing the opinion of those most concerned on such a crucial subject would be a valuable contribution to the emergence of the new continental public space.

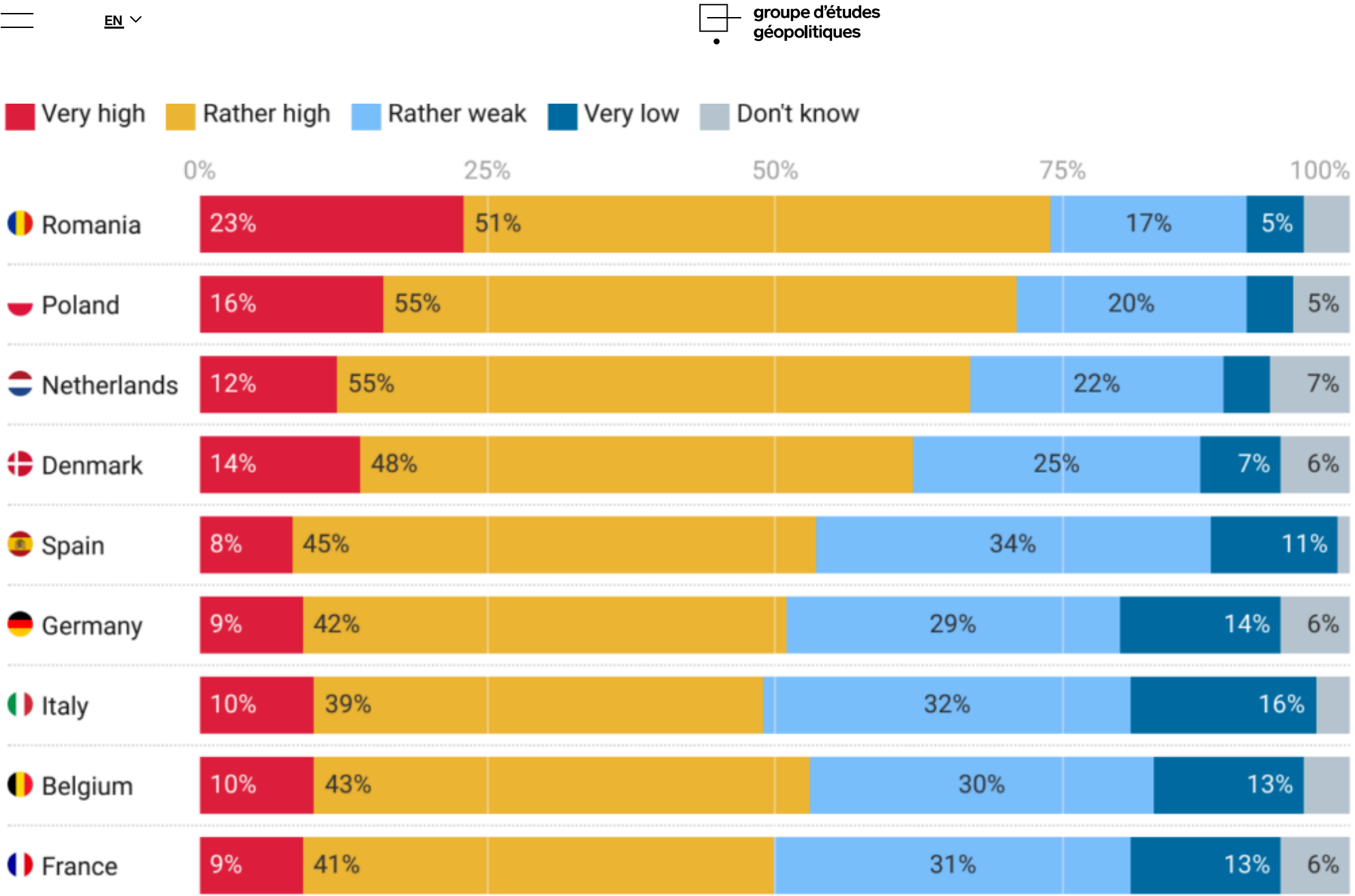
To accomplish this, we carried out [a first Barometer of European public opinion this past November based on a sample of 7,075 Europeans from 5 countries: Belgium, Spain, Italy, France, and Germany.](#)

This time we have chosen a larger sample of 10,572 individuals from the eight largest countries in the Union (Germany, France, Italy, Spain, Poland, Romania, the Netherlands, Belgium) to which we have added Denmark. This sample is representative of about two-thirds of the Union’s population.

It is an innovative way of carrying out surveys, which places citizens at the heart of the European public debate.

# 1 — Europeans fear the outbreak of armed conflict on EU territory

This is the first lesson of this study: a fairly clear majority (55% vs. 40%) consider “the risk of armed conflict on European Union territory in the next few years” to be high.



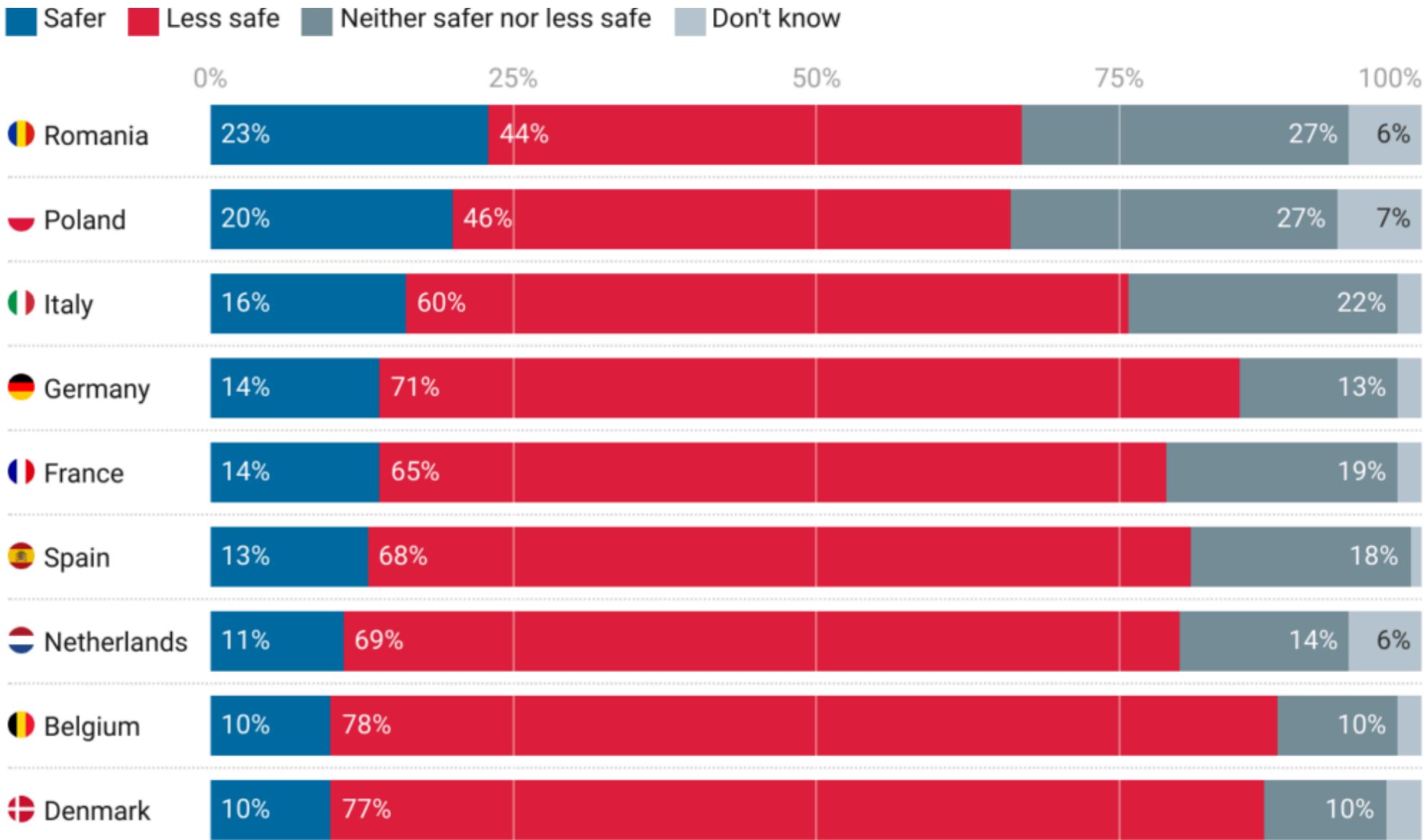
Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.

Chart: Le Grand Continent • Source: Cluster17

This sentiment was in the majority in all countries with the exception of Italy (49% vs. 48%). It is particularly dominant in the countries of northern Europe (Denmark and the Netherlands) and in those of eastern Europe (Poland and Romania), the latter undoubtedly due to their proximity to Russia and their shared borders with Ukraine. In both Poland and Romania, more than 7 in 10 citizens consider it to be high.

Russia's invasion of Ukraine more than three years ago has undoubtedly contributed significantly to the spread of such expectations. But our survey confirms that Donald Trump's return to the White House also plays a considerable role in changing the perceptions of Europeans.

In all 9 countries that we surveyed, nearly two-thirds of respondents consider that "the election of Donald Trump makes the world less safe" (63% vs a mere 15% who take the opposite stance). This position dominates everywhere and is the majority view in 7 out of 9 countries.

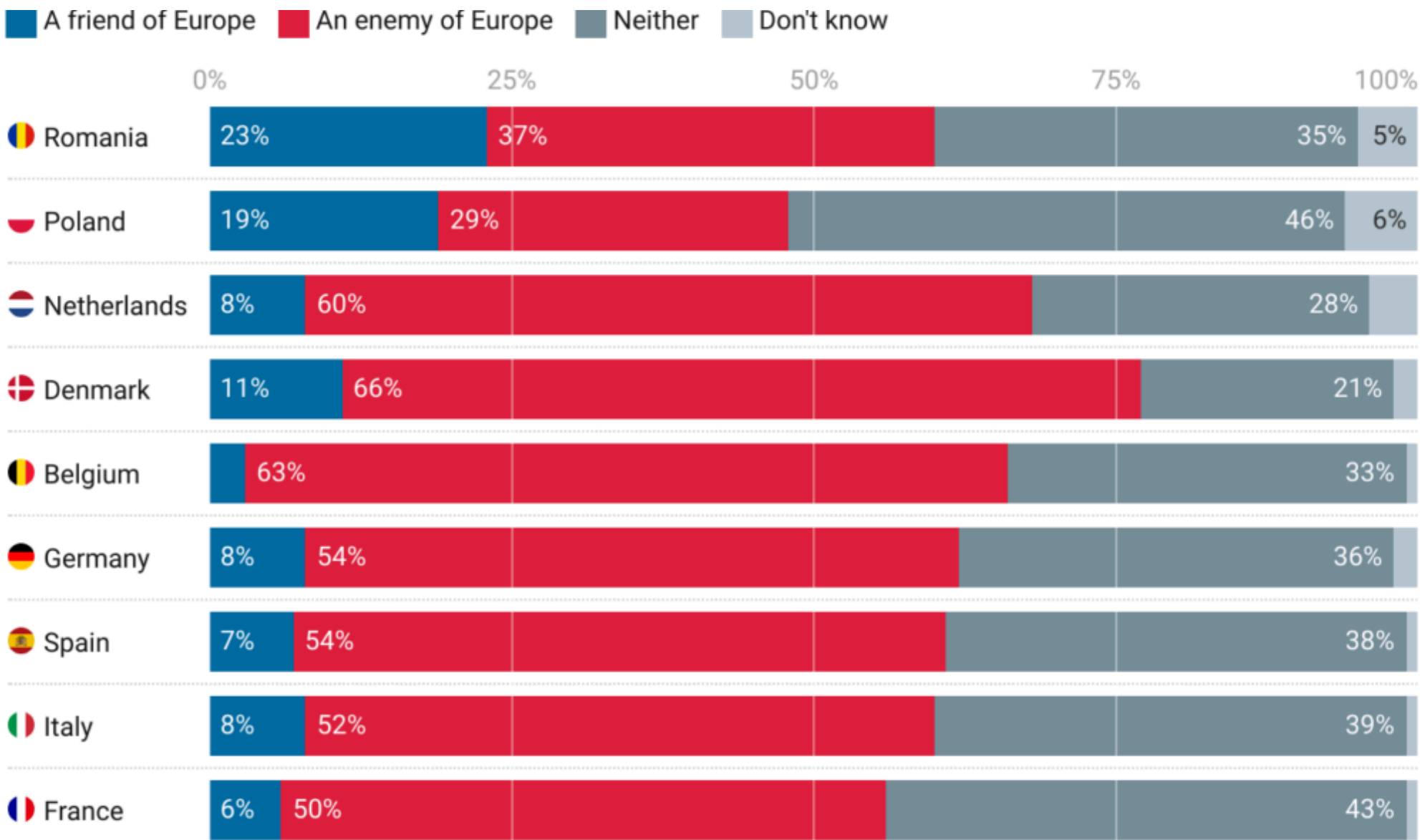


Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.  
Chart: Le Grand Continent • Source: Cluster17

## 2 — Trump as the enemy, Musk as the foil: there are no more American friends

It is, of course, much too soon to venture any kind of prognosis on the circumstantial or, on the contrary, enduring nature of this paradigm shift, but it must be said that today there is no longer any American friend for the Europeans.

Indeed, a majority (51%) consider Donald Trump to be “an enemy of Europe” versus just 9% who view him as “a friend of Europe”.



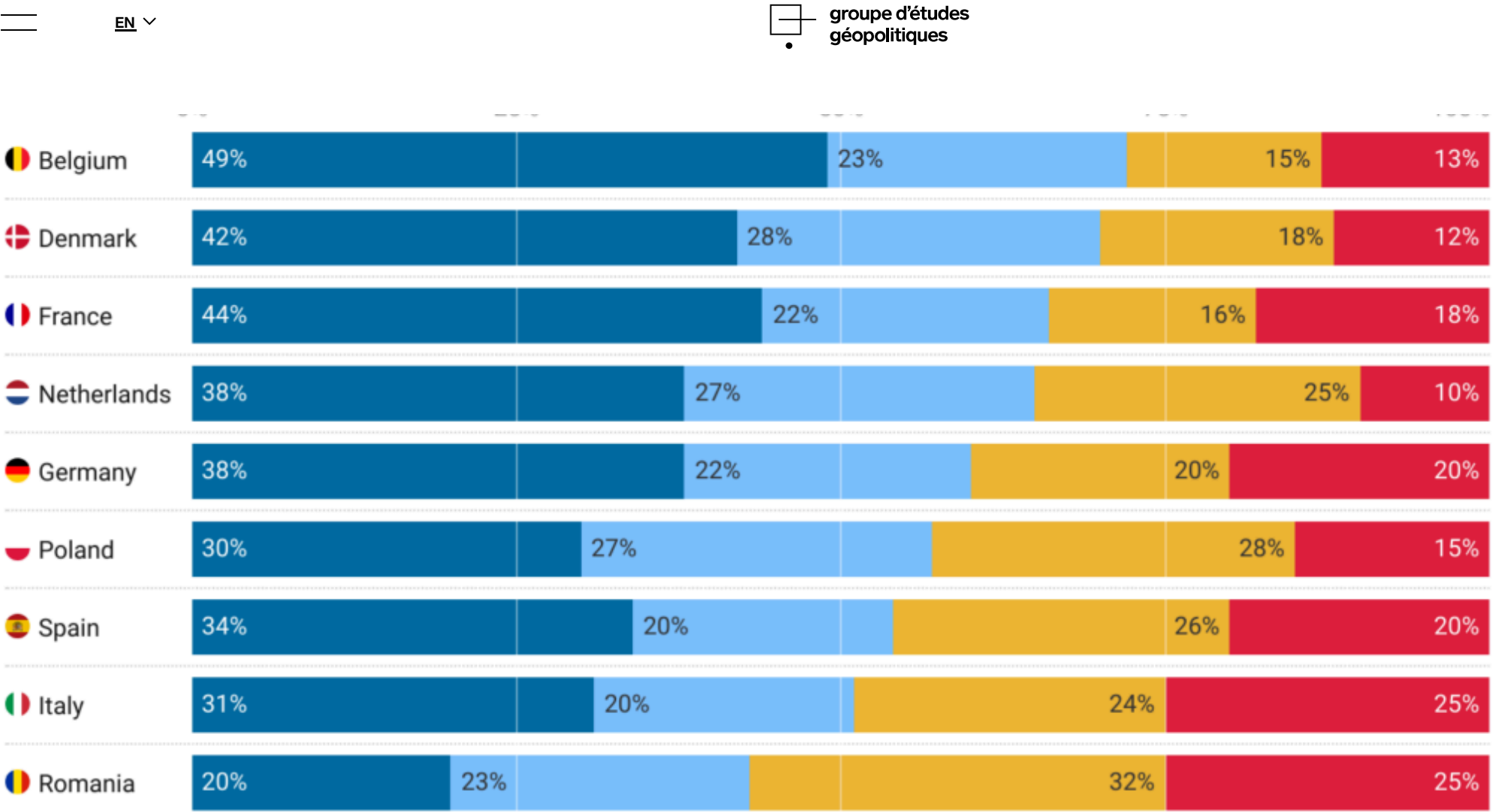
Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.

Chart: Le Grand Continent • Source: Cluster17

This negative view has increased compared to [our survey in November](#) and is now the majority in 7 out of 9 countries, and is particularly pronounced in the most northern nations: the Netherlands, Belgium, Denmark. On this point, Romania, and to an even greater extent Poland, stand out quite noticeably. In these two countries, opinions are less clear-cut with regard to the American president, even if very few citizens consider him a “friend of Europe” (23% and 19% respectively).

This negative perception also concerns one of the most well known and most important figures of this new American power: Elon Musk.

In the countries surveyed, nearly 8 citizens in 10 believe that he cannot be trusted (79%). This mass rejection of the head of X — including in countries that are less hostile to the Trump administration such as Poland and Romania — could have a lasting impact on his business activities and companies: 58% of those polled said they were in favor of boycotting Tesla.



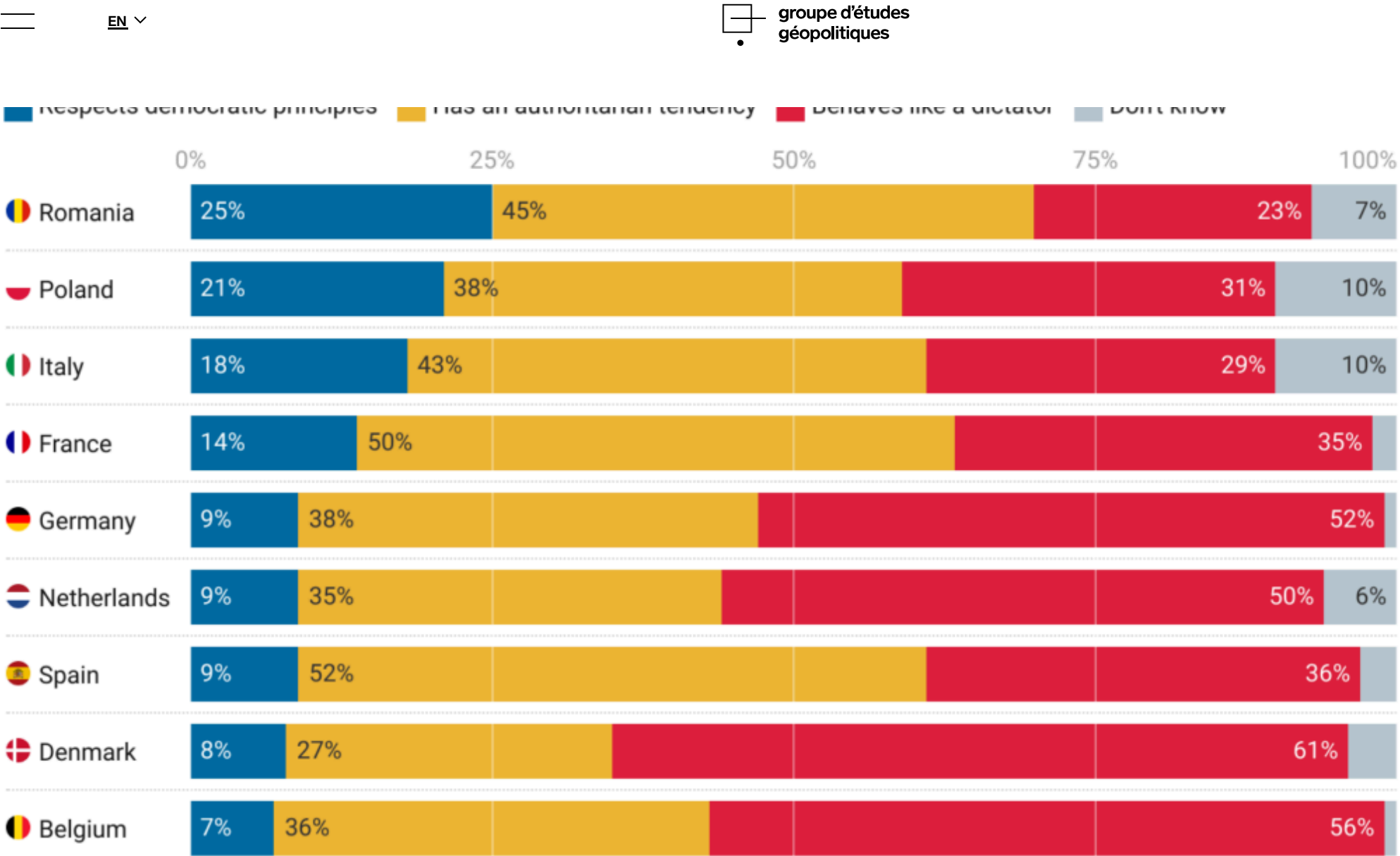
Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.  
Chart: Le Grand Continent • Source: Cluster17

It should be noted that this potential for a boycott could be particularly concerning for the American firm, as support is particularly strong in European countries with high purchasing power such as Denmark, the Netherlands and Germany.

### 3 — “Trump is acting like a dictator”: Europeans perceive an authoritarian shift in the United States

It is also striking to see how much Donald Trump is helping to change the perception of American politics.

Only a small minority (13%) believe that he “respects democratic principles”. Indeed, 43% believed that he “has authoritarian tendencies” and even 39% felt that he “acts like a dictator”.

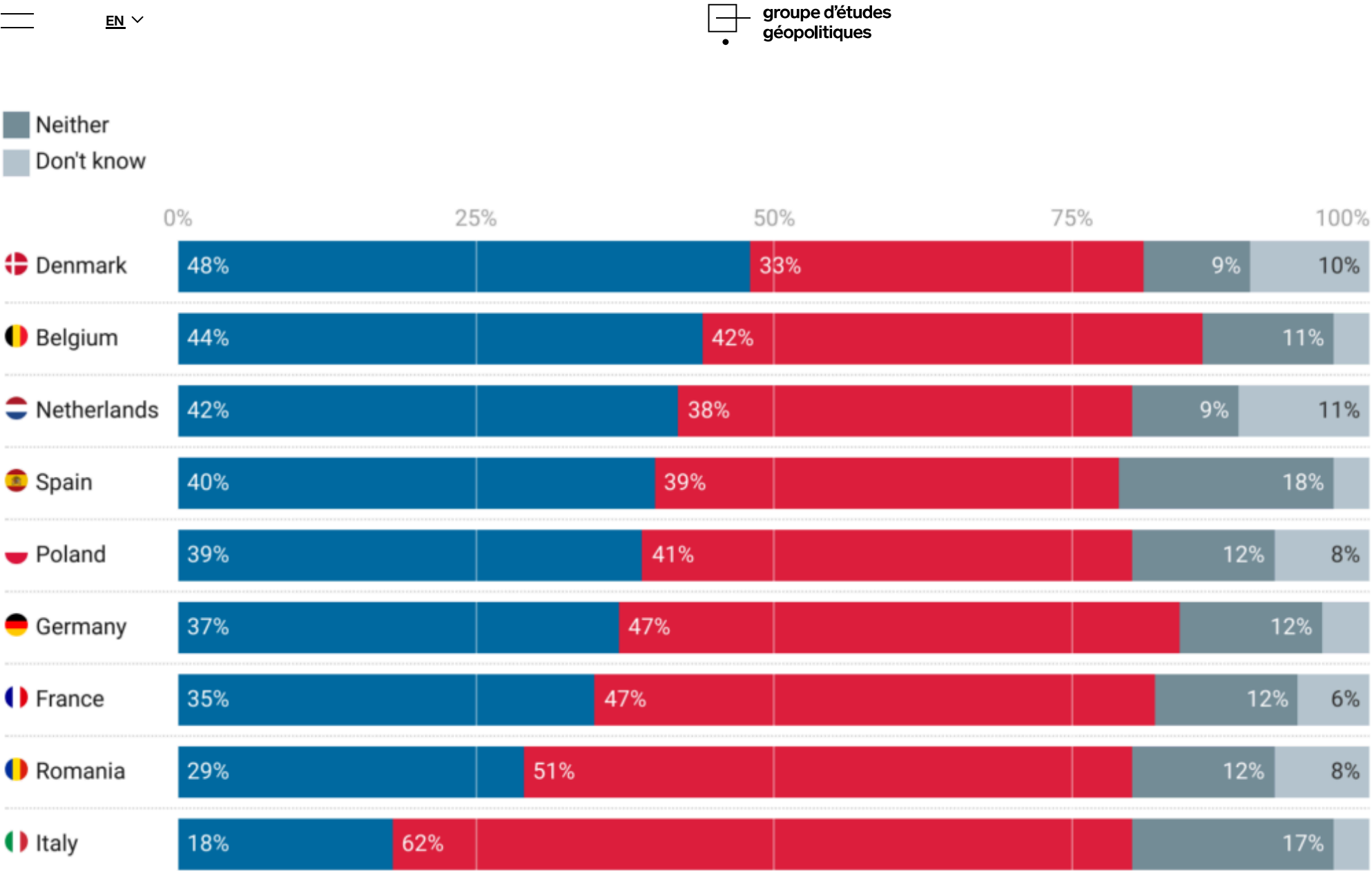


Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.  
Chart: Le Grand Continent • Source: Cluster17

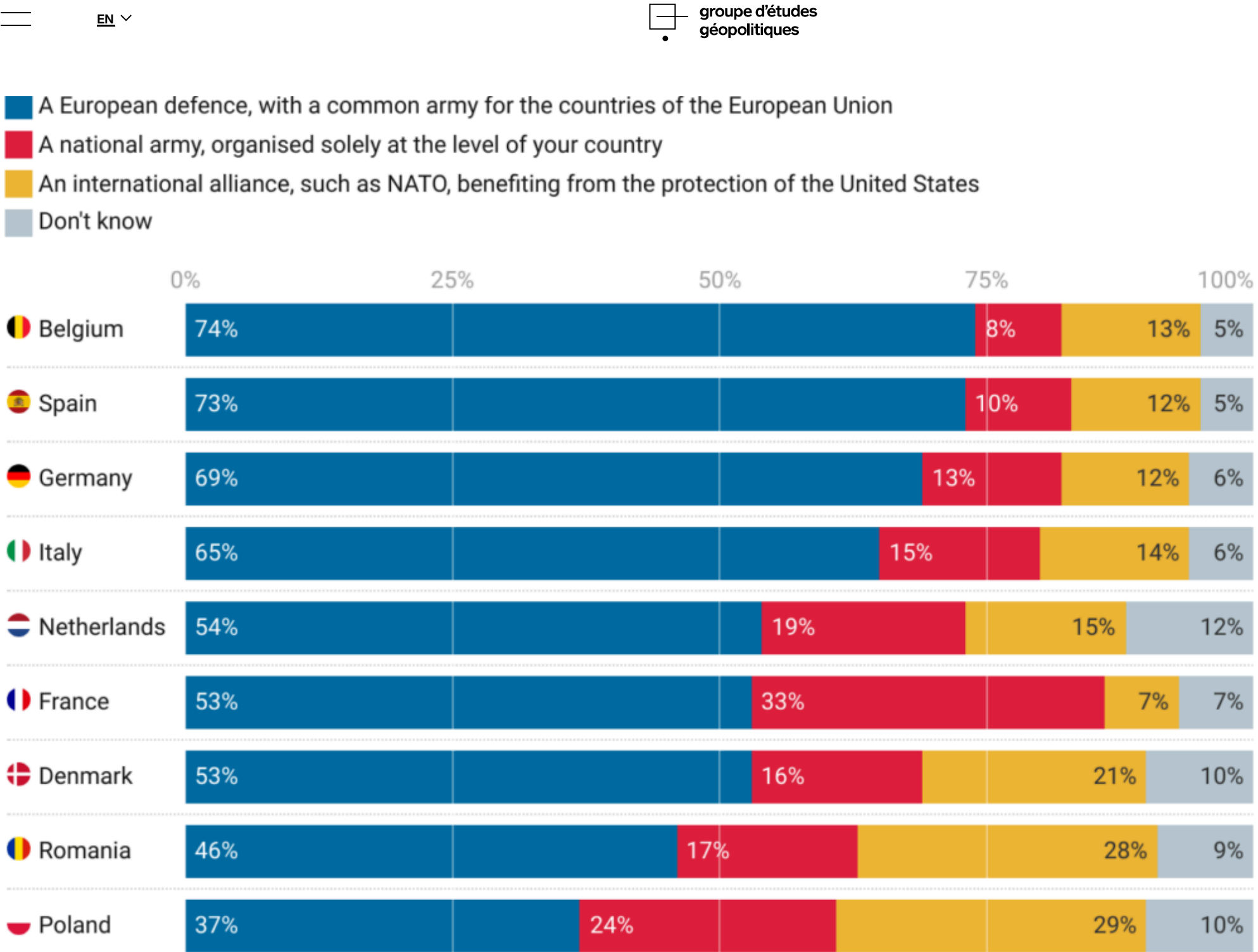
This erosion of American democracy’s image is measurable in the nine countries surveyed without exception, albeit with differences in degree: the northern countries were also the toughest on this point, with a majority describing its behavior as “dictatorial” in Denmark, Belgium, Germany and the Netherlands.

# 4 — Relying only on one’s own strength: 70% of Europeans in favor of defense

In this new international context, marked by a loss in confidence in Donald Trump’s United States, the Europeans we surveyed are, understandably, overwhelmingly in favor of a common defense.







Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.  
Chart: Le Grand Continent • Source: Cluster17

The uncertainty that has hung over Europe since the dramatic exchange between Donald Trump and Volodymyr Zelensky at the White House has led to an impressive acceleration in support for a common European defense. Since our first opinion poll in November, the desire for a common European defense grew in almost all the countries surveyed: +6 points in Italy, +12 points in Germany (65%), +9 points in Belgium (74%) and even +15 points in Spain (73%).

Only France clearly stands out. Just 42% of the French would like a common defense, compared to 54% in November. Support for the development of the national army is on the rise: 41% of French people believe that it is the preferred solution for defense (+8).

Poland and Romania, two countries where anticipation of war is most pronounced, remain more Atlanticist — but to a limited extent — or more committed to a defense that relies on national forces.

## 6 — Towards a rearmament effort of a strictly European nature

Several responses indicate that this common defense must be carried out within the framework of an effort to prioritize rearmament.

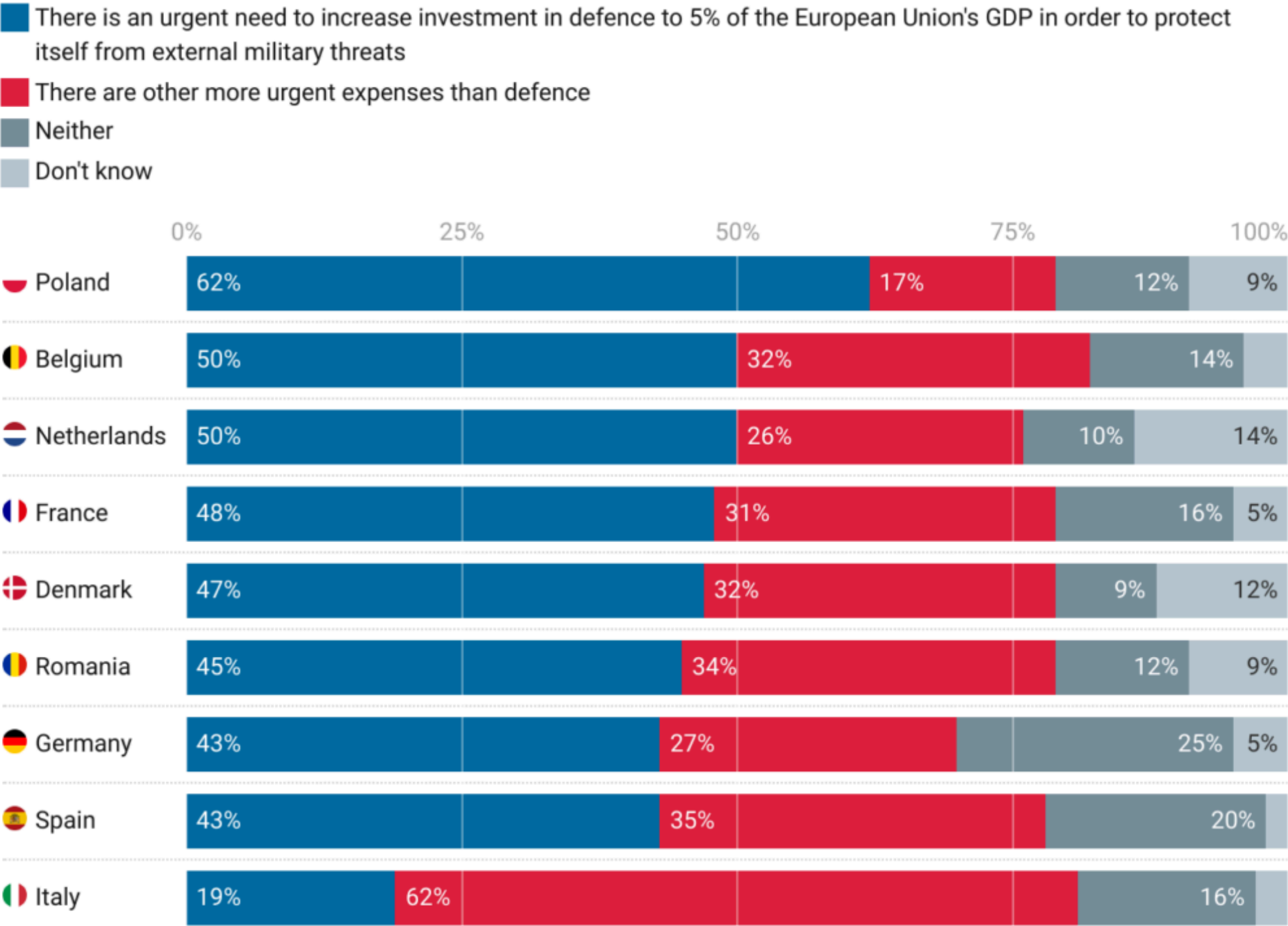
As such, a relative majority (43%) believe that “*it is urgent to increase the Union’s investment in defense to 5% of GDP in order to protect itself from external military threats*”, as opposed to 34% who believe that “*there are other more urgent expenses than defense*”.

On this point, there are fairly strong disparities depending on the country.

Poland — undoubtedly due to its borders with the Baltic nations and Ukraine as well as more intense sentiments of threat — is by far the country most favorable to strong investments in defense: 62%. Conversely, the Italians, who stand out on this matter, overwhelmingly (62%) respond that “*there are other more urgent expenses*”. In all the other countries, the decision to increase defense spending unites between 43% and 50% of citizens.



proposals do you agree with the most: —



Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.  
Chart: Le Grand Continent • Source: Cluster17

A very strong majority of citizens believe that Union member states should, for reasons of European sovereignty, be required to purchase their military equipment from member states and no longer — as is the case today — mostly from the United States. This point of view has a clear majority: 71% versus 20%.

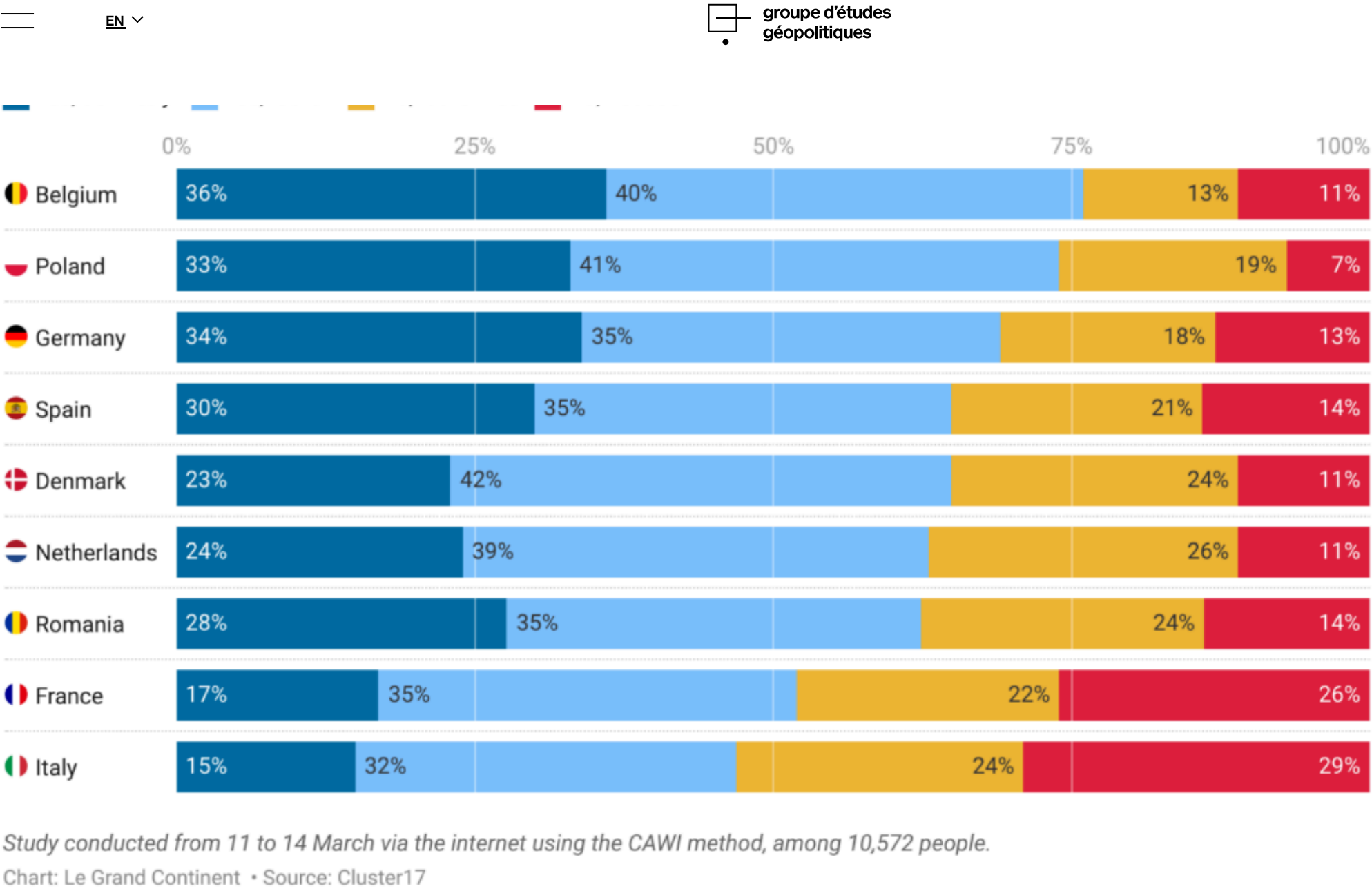
This sentiment prevails even in countries with a strong Atlanticist tradition and whose military equipment comes largely from the United States, such as Poland or the Netherlands.

7 — The French nuclear umbrella is widely endorsed: more than 6 out of 10 Europeans are said to be in favor

The possibility of extending French nuclear deterrence to other EU countries is, as we know, fueling a number of debates in Europe today.

For this reason, it was particularly interesting to learn the positions of Europeans on this issue, which concerns them first and foremost.

The results reveal a majority in favor: in the areas we surveyed, more than 6 in 10 citizens (61%) were in favor of such a prospect.

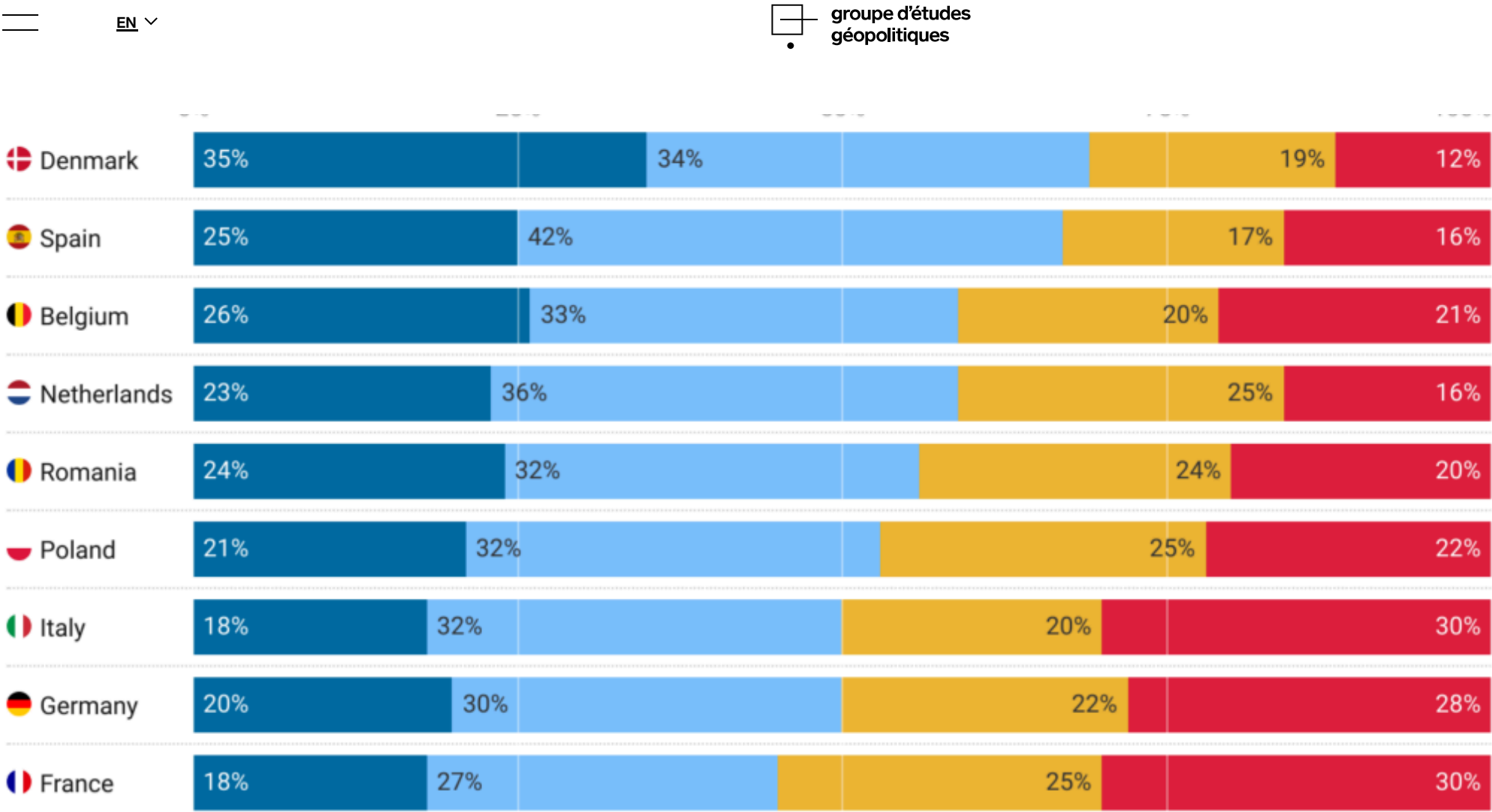


On this point as well, only Italy stands out with a small majority of respondents against: 53% versus 47%. For the other countries, with the exception of France, this support is over 60% and even reaches 74% in Poland and 76% in Belgium. These numbers attest, yet again, to the growing demand for the pooling of protection and defense instruments at the European level.

## 8 — A majority of Europeans are in favor of military support for Ukraine — except in Italy

Although EU citizens are generally inclined to compromise, a majority has emerged in favor of increased military support for Ukraine in the face of the disengagement of Donald Trump's United States: 54% versus 40% . While this is the majority opinion among two-thirds of the EU population we surveyed, noteworthy disparities between countries can be seen.

This position is very clearly the majority in 6 out of 9 countries: first and foremost in the northern countries (Denmark, Germany, the Netherlands, Belgium), but also in Poland and Spain. It wins out, though less decisively, in Romania and even more so in France. Finally, as with most of the questions in this survey, Italy stands out: it is the only country surveyed where a majority (59%) is opposed to increased military engagement to support Ukraine.



Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.  
Chart: Le Grand Continent • Source: Cluster17

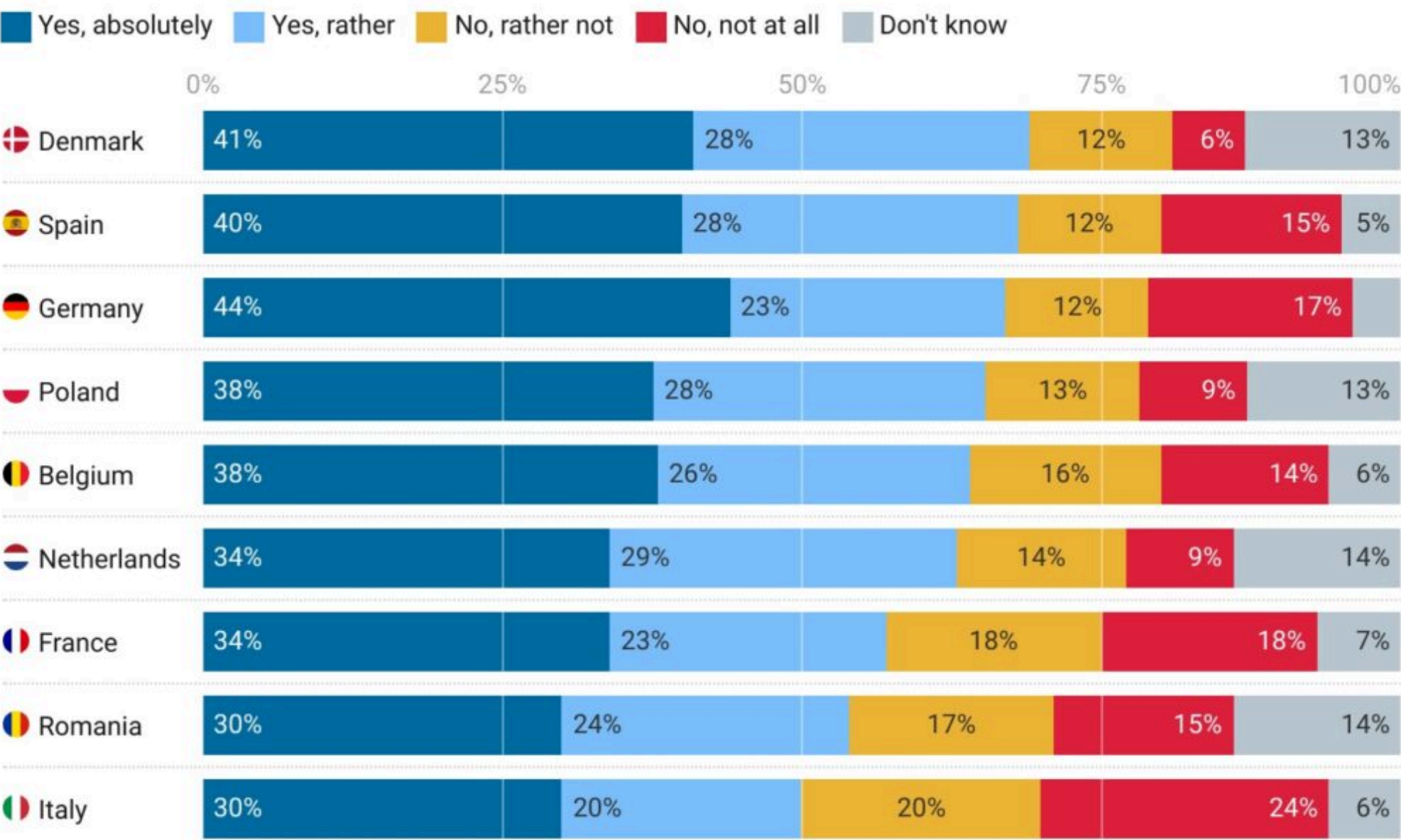
At the same time, more than half of the European citizens surveyed (56%) are in favor of Ukraine's accession to the Union by 2030. In 8 of the 9 countries surveyed, this was the majority position. Only France stands out here with a small majority of those surveyed who are unfavorable to this prospect (55%).

## 9 — European public opinion largely supports seizing Russian assets to finance support for Ukraine

On the other hand, the seizure of €235 billion in Russian assets that are currently frozen in financial institutions and European banks enjoys a fairly large consensus, both overall and in each of the countries studied.

More than 6 in 10 Europeans in the countries surveyed believe that these assets should be used to finance support for Ukraine.

# Favour of the European Union seizing these Russian assets and using them to finance support for Ukraine?"



Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.  
Chart: Le Grand Continent • Source: Cluster17

On this matter, in all countries surveyed without exception, a majority emerges in favor of such a solution. It is particularly favored in the countries of Northern Europe, Poland and Spain.

## 10 — The future of the war in Ukraine divides Europeans

Our study shows that European public opinion has rapidly changed in recent weeks.

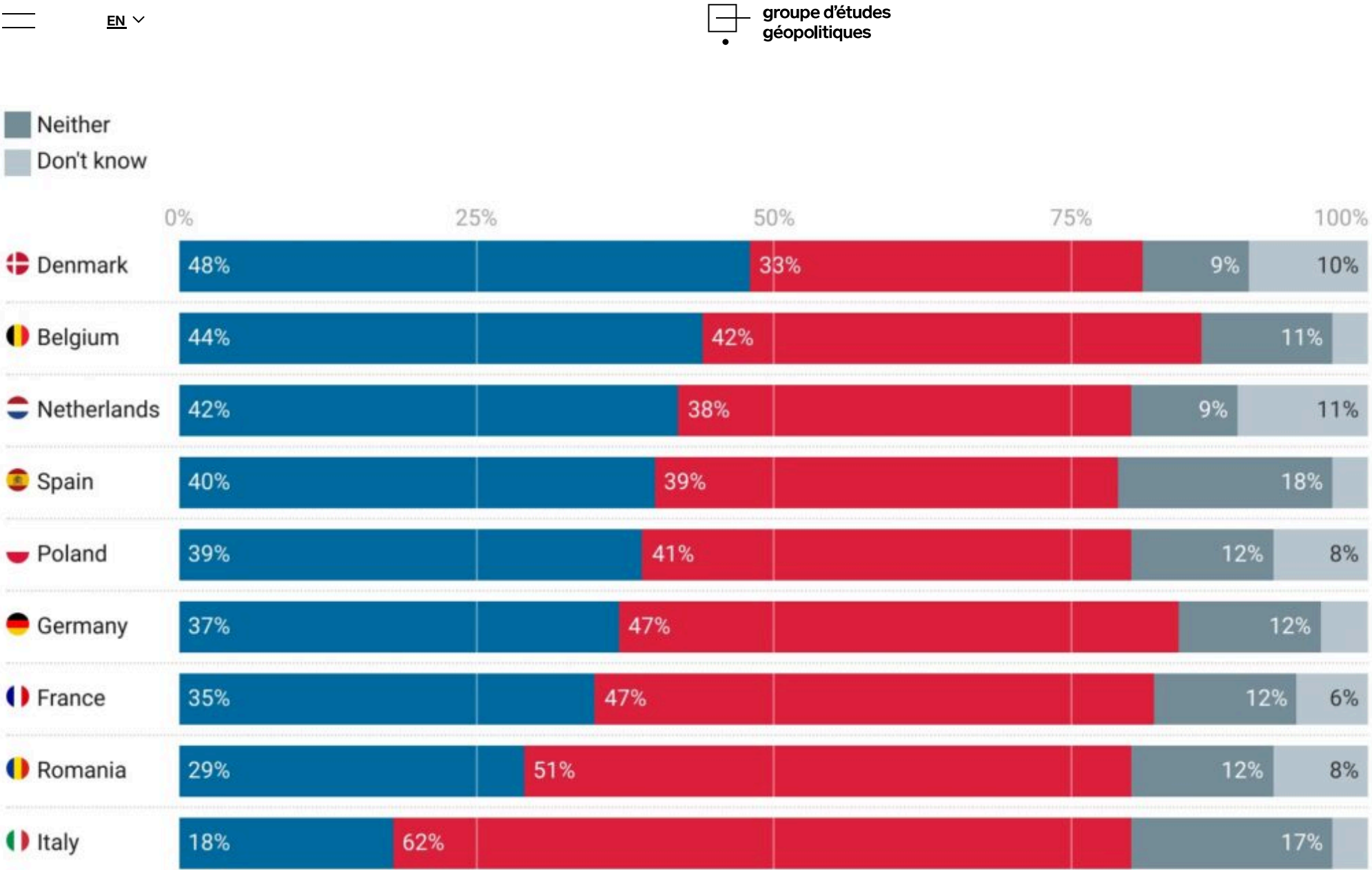
On the one hand, the “clash” between Trump and Zelensky seems to have strengthened pro-Ukrainian sentiment in Europe. Whether in France, Spain, Germany, or Italy, the desire to increase aid to Ukraine has clearly grown compared to the month of November. In all, 54% of European citizens surveyed are in favor of strengthening the Union’s military commitment to Ukraine.

Nevertheless, the situation is fragile. The majority of public opinion wants to end the war.

The Europeans surveyed are more likely (47%) to agree that “Ukraine should agree to sign a peace treaty even if it means ceding the part of its territory occupied by Russia” than the alternative proposal that “Ukraine should be given military support until it regains control of its territories occupied by Russia” (35%).

It is revealing that, faced with these options, almost one in five respondents (18%) did not choose, which is indicative of a level of uncertainty in public opinion.





Study conducted from 11 to 14 March via the internet using the CAWI method, among 10,572 people.

Chart: Le Grand Continent • Source: Cluster17

On this subject too, there is a clearly identifiable Italian anomaly: only the Italians show a clear majority (62%) in support of peace at the cost of the loss of occupied territories, and a slim majority of Romanians share the same point of view.

In both France and Germany, no majority emerges, but the option of peace has a relative edge over the option of continuing the war. In countries such as Poland, Spain, the Netherlands and Belgium, public opinion is very divided on this issue. Only the Danes favor continuing the conflict rather than a peace that would result in Ukraine losing territory.

Partager l'article



Sign Up For Our Weekly Newsletter

In-depth analysis and updates from Groupe d'études géopolitiques delivered to your inbox every week.

Your email address

I agree to receive communications from Groupe d'études géopolitiques

+

voir le plan