**NEW POLL OF EUROPEAN ATTITUDES TOWARDS CHINA, RUSSIA AND THE UNITED STATES REVEALS A MAJORITY WANT EU AUTONOMY ON SECURITY AND DEFENCE**

* *ECFR’s new multi-country survey report reveals an unwillingness among Europeans to support the United States against China, in the event of military escalation between the superpowers, as well as a determination for the EU to impose economic sanctions on Beijing if it provides further aid towards Russia’s invasion of Ukraine. The polling shows that 74% of respondents believe Europe should diversify away from dependence on US security guarantees and invest in its own defensive capabilities*
* *Survey findings suggest Emmanuel Macron and Olaf Scholz’s policy positions of seeing China as a strategic and global partner are broadly in-line with European public opinion* – *with large pluralities of citizens in Europe viewing China more as a “necessary partner” than a "rival" to their country and to Europe. Majorities in every surveyed country want Europe to remain neutral in any conflict between the US and China over Taiwan.*
* *There are, however, concerns about China’s economic agenda and soft power efforts. ECFR’s survey reveals Europeans are uncomfortable with the prospect of Chinese ownership of key infrastructure, such as bridges or ports (with 65% holding this view on average across the surveyed member states), tech companies (58%), and owning a newspaper in their country (42%).*
* *For many Europeans (with 41% holding this view across the surveyed member states), Chinese arms deliveries to Russia would be a red line and reason to impose sanctions on China* – *even if that would harm Western economies.*
* *In their analysis, ECFR foreign policy experts and report co-authors, Jana Puglierin and Pawel Zerka, argue that, despite various disagreements, European leaders have an opportunity to build a public consensus around Europe’s approach to China, the US, and Russia.*

Amid increasingly fraught relations between the world’s leading superpowers, Europeans want to see the EU scale up its defence capabilities and move away from dependence on US security guarantees, according to a major polling-backed report published today by the European Council on Foreign Relations (ECFR). The report, which comprises public opinion data from eleven EU member states – Austria, Bulgaria, Denmark, France, Germany, Hungary, Italy, Netherlands, Poland, Spain and Sweden – reveals that, on average, 74% of Europeans now believe that the EU should take steps towards improving the bloc’s defence capabilities.

The report, ‘***Public concern: For a new European foreign policy consensus*’**, also explores attitudes towards China, and its dealings with individual EU member states, as well as Russia, which is currently subject to pan-European sanctions following its illegal invasion of Ukraine.

It looks at the main divisions between, and within, EU member states, and provides policy suggestions for EU leaders on how they can translate the idea of a sovereign Europe into practice. The multi-country survey, which was commissioned through Datapraxis and YouGov, as well as Alpha (Bulgaria), Szondaphone (Hungary), and Analitiqs (Netherlands), suggests that, when it comes to China and its perceived ambitions, there may be a disconnect between the hawkish policy position of leaders in Brussels, and the wider European public.

The report’s findings on China suggest that European Commission President, Ursula von der Leyen, still needs to convince the European public about the need to de-risk the EU’s relationship with Beijing. The dataset from the eleven surveyed EU member states indicates that Emmanuel Macron’s vision, of seeing China as a “strategic and global partner”, is a more accurate representation of where the European public opinion currently is on this question.

ECFR found that a plurality of Europeans (43%) now thinks of Beijing as a “necessary partner” to their country, and despite China’s commitment to “deepen economic ties with Moscow”, would baulk at the idea of widening the sanction programme to include Beijing. There may be some practical reasons behind it – including EU members’ different levels of economic exposure to China, and their varied economic vulnerability overall. But there also seems to be little awareness across Europe of the risks entailed in Europe’s trade and investment relationship with China. Only one in five Europeans view this relationship as bearing more risks than benefits – while 49% see more risks than benefits in Europe’s imports of fossil and nuclear fuels from Russia.

The survey also indicates that EU-US relations have rebounded from the volatility of the Trump presidency. When asked how they see the US, ECFR found that majorities in Denmark (55%) and Poland (50%), and pluralities in Netherlands (43%), Sweden (41%), and Germany (35%), now view the transatlantic partner as Europe’s “ally” – a significant shift in all these countries from when the think-tank asked this [same question in 2021](https://ecfr.eu/publication/crisis-of-confidence-how-europeans-see-their-place-in-the-world/).

Yet, despite this uptick in support, there are fears about the political direction of the US and how this might impact relations with the EU. 56% of respondents to ECFR’s survey indicated that the re-election of Donald Trump would “weaken” EU-US relations. This, and other challenges, such as the Ukraine war, appear to have focused minds, to the point that a clear majority (74%) of Europeans opt for scaling up Europe’s defence capabilities – while only 8% say this is unnecessary because the US will always protect Europe. The desire for greater control over European foreign policy is also exemplified by the question of the EU’s position in the event of a conflict between the US and China over Taiwan. ECFR found that a clear majority (62%) of European citizens to its poll believe their country should adopt neutrality in such circumstances – while less than a quarter (23%) would favour taking the US’s side.

**Key findings from ECFR’s pan-European survey include:**

* **Europeans are at odds with the Brussels position on China.** The survey reveals that a plurality of respondents (43%) considers China Europe’s “necessary partner”, and that this sentiment is particularly strong in Bulgaria (58%) and Hungary (54%). Majority support for this sentiment was also detected in Spain, where 51% stated that they consider China a partner with whom they must strategically cooperate. This view was also held among pluralities in the Netherlands (49%), Austria (46%), Italy (42%), Denmark (40%), Poland (36%), Germany (33%), France (31%) and Sweden (31%). The two countries that were most hawkish on China were Germany and Sweden (where 50% of those surveyed stated that they consider the country to be Europe’s “rival” or “adversary”).
* **While many citizens recognise that Russia and China are working together on the global scene, there is little appetite to “decouple” relations with Beijing, as with Moscow.** 70% of respondents to ECFR’s poll believe Russia and China are partners on the global stage – a position publicly evidenced by their “no limits” economic partnership, first agreed in February 2022 and recently reaffirmed in May 2023. However, even against this backdrop, Europeans do not yet believe that a major break in relations with China is required. Only about a fifth (22%) of Europeans consider Europe’s trade and investment relationship with China as bearing more risks than benefits.
* **However, if China moved to deliver ammunition and weapons to Russia, ECFR found that 41% of those surveyed across Europe would be in favour of imposing economic sanctions on Beijing – even if that meant seriously harming Western economie**s. In three countries of the eleven surveyed, Sweden (56%), Denmark (53%), and Netherlands (51%), were a majority of respondents in favour of Western sanctions in this event. Pluralities to this view were also evident in Spain (49%), Poland (45%) and France (41%). Meanwhile, citizens in Austria (45%), Hungary (44%), Italy (42%), Bulgaria (39%) and Germany (38%) were most likely to oppose such actions.
* **There are concerns about Chinese economic activity and soft power moves in the EU-27.** Many Europeans oppose the idea of Chinese ownership of key infrastructure, such as bridges or ports (65%), tech companies (52%) or newspapers (59%) in Europe. They are split, however, on whether China should be able to build such infrastructure (with 39% stating it is “acceptable” for China to “build infrastructure such as bridges and ports in Europe”, to 43% opposing such actions). This suggests ownership is the dividing line for Europeans.
* **America has largely restored its reputation as an “ally” and “partner” of the EU – but there are concerns about the damage a second Trump presidency would wreak on the transatlantic alliance.** While no country saw the US predominantly as Europe’s ally who “shares our [European] interests and values” in 2021, this view is now prevalent in Denmark (55%), Poland (50%), Netherlands (43%), Sweden (41%) and Germany (35%). It is also the view of 43% on average across all eleven countries surveyed. The US is mostly seen as Europe’s “necessary partner” in Spain (55%), Italy (52%), Hungary (51%), Austria (48%) and France (44%). Only in Bulgaria do a comparatively large minority (21%) see the US as an “adversary” or “rival”. But when asked what impact, if any, the re-election of Donald Trump would have on EU-US relations, a majority of respondents (56%) stated it would be “weaker”.
* **Given this, there is an appetite in Europe for scaling up European defensive capabilities.** ECFR found that almost three-quarters (74%) of Europeans believe that Europe cannot always rely on the US for its security, and that it needs to look after its own defence – while only 8% say this is unnecessary because the US will always protect Europe. Despite the US’s role in standing up to Russia’s aggression on Ukraine, the former view has consolidated since ECFR asked a [similar question](https://ecfr.eu/publication/a-new-transatlantic-bargain-an-action-plan-for-transformation-not-restoration/#security), in November 2020; the increase has been particularly marked among respondents in Hungary, the Netherlands, and Germany.
* **This demand for a high degree of self-reliance vis-à-vis Washington on foreign policy issues is evidenced on the question of Taiwan. Europeans are clear that they want the EU to be a neutral player in any potential conflict over the island.** Majorities in all eleven surveyed member states would like their country to “remain neutral” in the event of a war regarding Taiwan. On average, only about a quarter (23%) would want their country to take America’s side. Support for the US is particularly strong in Sweden (where 35% hold this view), as well as in Poland (31%), the Netherlands (30%), and Denmark (28%) – but, even across these countries, most would prefer a position of neutrality.
* **Russia is predominantly seen as an “adversary” and “rival” of Europe, fifteen months on from its invasion of Ukraine**.ECFR found that 64% of respondents, across the eleven surveyed countries, think of Russia as Europe’s “adversary (55%) or “rival” (9%). In Denmark (74%) Poland (71%), Sweden (70%), the Netherlands (67%), Germany (62%) and Spain (54%), majorities think of Russia as an “adversary” of Europe – while only 37% in Italy and 17% in Bulgaria do.The dataset also reveals that the average share of respondents seeing Russia as a “rival” or “adversary” has increased from around one-third to almost two-thirds, since ECFR asked the [same question in 2021](https://ecfr.eu/publication/crisis-of-confidence-how-europeans-see-their-place-in-the-world/).
* **Opinion on the continent’s long-term relations with Russia differ greatly.** Around half of those surveyed (48%) believe their country’s relationship with Russia, in the event of a negotiated peace settlement in Ukraine, should be “limited”. This is the plurality viewpoint everywhere – even in Poland, although the Polish public is the most divided on this point, with 39% willing to end all Poland’s relations with their neighbour. The only country where a majority (51%) of citizens expressed the view that it should be “fully cooperative” was Bulgaria.
* **In Bulgaria, Hungary, and Austria, a significant proportion of citizens see merit in cooperating with Russia.** A majority of respondents in Bulgaria (62%) and Hungary (59%) view Russia as an “ally” or “partner” of their country. This position marries with data collected in ECFR’s [2023 European Sentiment Compass](https://ecfr.eu/publication/culture-clash-russia-ukraine-and-the-fight-for-the-european-public/), which shows that both countries are among the most vulnerable to Russian soft power efforts. What is more, many in Bulgaria (51%), Austria (36%), and Hungary (32%) would like their country to re-establish a fully cooperative relationship with Russia once the war is over.

In their analysis, Puglierin and Zerka argue that EU leaders should identify the points on which the public demonstrates an openness to ambitious policies and act on them – while acknowledging the limitations of their support. For example, a majority of Europeans now hold the view that they cannot always rely on the US for security – and that, in response, the EU should explore a scaling-up of its own defence capabilities. European governments should be emboldened by this public support to invest more in European defence capabilities and strengthen their defence and foreign policy coordination, according to the authors.

On EU-China relations, the authors state that there is a foundation for building a “common ground” between the public and their political leaders regarding Beijing’s influence in Europe, given that citizens seem sceptical of China’s practical economic presence. But European citizens do not seem to think that Europe could or should decouple from China, as it has done from Russia, even if they are well aware that China and Russia have entered into a close partnership.

Leaders should therefore communicate the risks of Europe’s more abstract and distant interdependence on China. They should also point to various scenarios that could play out between the US and China – whose likelihood tends to be underestimated by the public. There is merit to framing discussion on China around the preservation and importance of European values, and being open with the fact that excessive dependence on Chinese investment will inhibit the EU’s ability to speak out on human rights and democracy.

Puglierin and Zerka conclude that the most important question facing the EU is not which side it should pick in potential conflicts between the world’s superpowers, but how it can safeguard what Europe stands for whilst reconciling the demands of its citizenry, and their own desires to see the EU act, with self-determination on the global stage.

***Commenting on the findings of ECFR’s pan-European survey, report co-author and senior fellow, Jana Puglierin, said:***

*“The chief takeaway from our survey is that Europeans want to see the EU become more self-reliant in foreign policy and build up its own defensive capabilities. These are not new demands of the EU, or of the leaders of its member states, but they have been sharpened by the war in Ukraine and the growing tensions between the US and China.*

*This could be a defining moment for the EU, and poses the question of whether it can reconcile differences of opinion within the bloc, and shift from its dependence on the United States to a position where it can strike its own policy positions.”*

***Co-author and senior fellow, Pawel Zerka, added:***

*“To adapt Europe to an increasingly competitive world, European leaders will need the public’s backing. They cannot lead the public against its will, but nor can they just follow the public. European citizens demand to have a greater say on foreign policy matters. But their opinions on foreign policy tend to be defined by current circumstances, rather than taking into account possible abrupt changes to the status quo.*

*If European leaders were to base their actions on the expectations of the public, they would fail to prepare for highly disruptive scenarios – with potentially devastating consequences for European security. They should therefore enter into an active conversation with their publics to prepare them for various geopolitical scenarios and difficult decisions, and communicate the dangers of inaction.”*

This new survey, and the accompanying analysis, form part of ECFR’s [Re:shape Global Europe](https://ecfr.eu/europeanpower/reshape/) project which seeks to develop new strategies for Europeans to understand and engage with the changing international order. Earlier publications within this project include the [European Sovereignty Index](https://ecfr.eu/special/sovereignty-index/), the [Power Atlas](https://ecfr.eu/special/power-atlas/), and the [2021 public opinion polling](https://ecfr.eu/publication/crisis-of-confidence-how-europeans-see-their-place-in-the-world/) on how Europeans see their place in the world.

ECFR’s other public opinion polling work includes multiple examinations of European attitudes towards the Ukraine and Russia conflict, both prior to the outbreak of war, four months on from Russia’s illegal invasion, and one year on; and polling-backed research into European views towards, and expectations of, the United States and other international powers. ECFR’s survey of Europeans, ahead of Russia’s invasion of Ukraine in February 2022, can be accessed [here](https://ecfr.eu/publication/the-crisis-of-european-security-what-europeans-think-about-the-war-in-ukraine/). Opinion outputs from June 2022 can be accessed [here](https://ecfr.eu/publication/peace-versus-justice-the-coming-european-split-over-the-war-in-ukraine/). And ECFR’s survey on public attitudes towards the war and the European response, one year on, can be viewed [here](https://ecfr.eu/publication/fragile-unity-why-europeans-are-coming-together-on-ukraine/).

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**NOTES FOR EDITORS**

**AUTHORS**

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**INTERVIEWS**

The report authors are available for comment and interview with interested broadcast, digital, and print media. Please contact ECFR’s Communications Team at communications@ecfr.eu to arrange.

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| **EVENT**  You can watch the livestreamed presentation of the pan-European polling data at ECFR’s annual conference in Stockholm on **7 June, 13:45 – 14:00 CEST** [here](https://ecfr.eu/event/annual-council-meeting-2023/). |

**POLLING & METHODOLOGY**

This report is based on a public opinion poll of adult populations (aged 18 and over) conducted in April 2023 in 11 EU countries (Austria, Bulgaria, Denmark, France, Germany, Hungary, Italy, the Netherlands, Poland, Spain, and Sweden). The total number of respondents was 16,168.

The polls were carried out for ECFR as an online survey through Datapraxis and YouGov in Austria (1,000 respondents; 6-12 April), Denmark (1,019; 6-11 April), France (3,087; 6-14 April), Germany (3,023; 6-13 April), Italy (1,000; 6-12 April), Poland (1,525; 6-18 April), Spain (1,502; 6-12 April), and Sweden (1,003; 6-12 April); and through Datapraxis and Alpha in Bulgaria (1,000; 6-19 April); Datapraxis and Szondaphone in Hungary (1,002; 6-20 April); and Datapraxis and Analitiqs in the Netherlands (1,007; 4-13 April). In all these countries the sample was nationally representative of basic demographics and past votes.

For certain questions – concerning the perception of other countries as allies, partners, rivals, or adversaries; the future relationship with Russia; and the position to be adopted in the event of a US-China conflict over Taiwan – national samples were split so equal numbers of respondents answered from the perspective of Europe and from their own country.

**GRAPHICS FOR MEDIA USE**

ECFR has produced survey-related graphics, which are free for media use. They can be accessed [here](https://europeancouncil.sharepoint.com/:f:/g/EjOxguVSJHFMoaeIV7zTHAUBvJnKIEv2u1DJLT_WrpphMQ?e=qdFB2V).

**DONORS & PARTNERS**

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**ABOUT ECFR**

The European Council on Foreign Relations (ECFR) is an award-winning, pan-European think-tank. Launched in October 2007, its objective is to conduct research and promote informed debate across Europe on the development of coherent and effective European values-based foreign policy. ECFR is an independent charity and funded from a variety of sources. For more details, please visit: [www.ecfr.eu/about/](http://www.ecfr.eu/about/).