2023 security radar.

Zeitenwende for Europe:

Public perceptions before and after Russia’s invasion of Ukraine

FRIEDRICH EBERT STIFTUNG

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Executive summary

Russia's war against Ukraine represents a watershed in Europe. Security Radar 2023 examines public attitudes in Germany, France, Latvia and Poland right before the invasion (autumn 2021) and ten months after it (autumn 2022). The changes in public opinion within a year trace the tectonic shifts occurring in Europe.

The results of the survey provide a grim picture of heightened concerns and fears. They also indicate an awareness that there are no easy solutions to the war. Across the board people are overwhelmingly worried about wars and conflicts and even consider new wars in Europe likely. These fears have risen sharply compared with last year. Geopolitical tensions are now assigned top priority in international affairs. Worries about economic crises, inflation and the rising cost of living are pervasive, affecting up to 90% of respondents.

The results indicate a perception of opposing blocs in international relations: the EU and the United States on one side, and Russia and China on the other, with tensions running high. While Russia is viewed similarly across the four polled countries, views on China differ. Russia is not considered part of European security or a partner for cooperation any more, but rather an aggressive, destabilising actor and a long-term adversary.

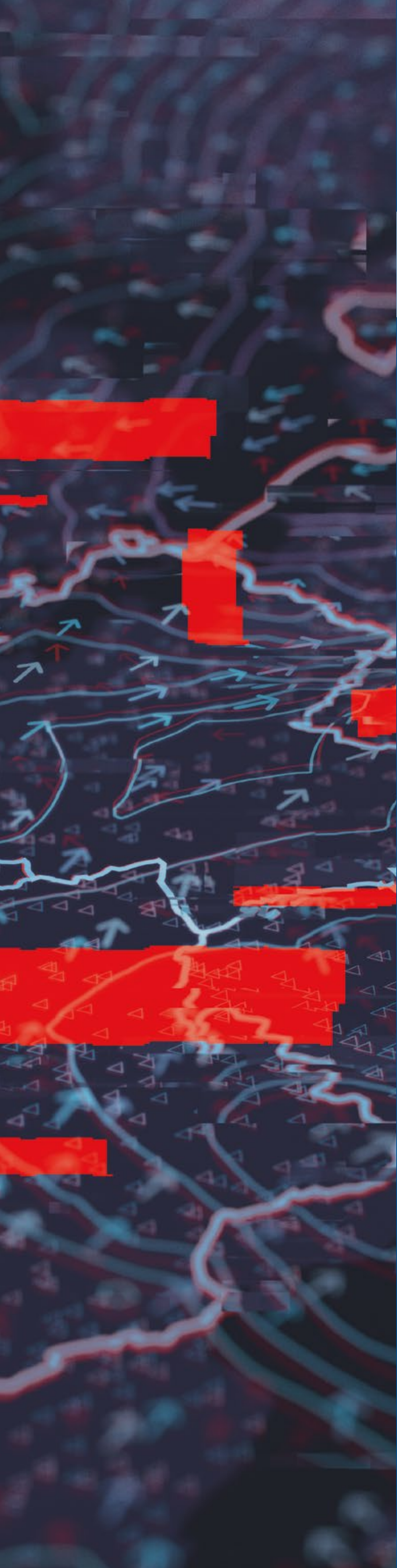
The end of Russia's war against Ukraine is widely considered essential for rebuilding European security. The war is expected to grind on for the foreseeable future, with no clear path towards an end. Despite economic fears, people are prepared to support Ukraine against the aggressor across the board. They endorse the widening of sanctions and support a ban on Russian oil and gas, even at the expense of rising prices. Weapons supplies to Ukraine are polarising, and sending their country's own troops is a clear red line: there are overwhelming majorities opposing such a step. The survey shows stable support for Ukraine, but no willingness to become embroiled in the war.

Overall, the war has brought threat perceptions among the polled countries closer together. Respondents in the four countries broadly share views on a number of crucial issues, such as increased military spending, stronger cooperation between NATO and the EU, as well as priority for peace, the importance of diplomacy, and the peaceful mitigation of conflicts.

Nonetheless, there are still notable differences, which often run along East–West lines and may complicate the formulation of a common EU security policy. They pertain to the desirability of a stronger role for NATO, the question of potential Ukrainian membership of NATO and the EU, opinions on military interventions and on cooperation with non-like-minded states.

Most alarmingly, mutual trust is low inside the Weimar triangle (Germany, France and Poland). Perceptions of Germany, often designated as a leader of European policy, are divided: it is viewed as a leader by France and Latvia, but as an obstructor by Poland. The silver lining is that leadership by the three countries together garners considerable trust.

When looking ahead, three interconnected divisions need to be addressed. First, rifts within the EU between Western and Eastern countries that may diminish the Union's clout. In this context, temporary complementarity between European and US security policy should not be confused with permanent unity, even though the Western alliance is currently coherent and united in its approach to the war in Ukraine. Second, a looming conflict between democracies and autocracies that should not preclude issue-based cooperation to address global challenges such as the climate crisis. Third and most importantly, a hot conflict on the European continent: Russia's war against Ukraine. Helping Ukraine to prevail while avoiding an escalation that could draw other countries into the war is the most pertinent objective for political decision-makers.



Overview

Introduction

Research design

Introduction

Security Radar 2023 is the third edition of a survey first conducted in 2019 in seven countries, and then in 2022 in fourteen countries across the OSCE space. It is a representative public opinion poll capturing citizens' attitudes on a broad array of foreign and security policy issues. The focus of this year's edition is clearly the war in Ukraine and the European response.

The previous edition of the survey appeared at the Munich Security Conference in mid-February 2022, a few days before Russia's invasion of Ukraine. That analysis enabled us to produce a kind of a baseline of how populations in a number of OSCE countries were looking at security policy before the Russian attack.

The follow-up edition, Security Radar 2023, appears exactly one year later, examining changes in public perceptions since the start of the war. It takes a closer look at how the war has changed perceptions in key countries of the European Union and NATO.

We selected France, Germany, Latvia and Poland as this year's survey states. All four countries were part of the previous editions of the Security Radar. We chose these four countries for a number of reasons. One of the first effects of the Russian war was a major policy shift in Germany, dubbed the *'Zeitenwende'* (watershed). In the wake of this shift, the country has pursued policies that indicate a decisive change in attitude towards European security writ large and towards Russia more specifically. The survey thus helps us to understand how deeply these changes affect the perceptions of the German population.

With a different German approach to security policy, the chances of a new impetus for EU security initiatives or a strengthened European pillar in NATO have altered. Therefore it also seemed worth looking into changes in other countries that are integral part of such initiatives and to compare developments between close European allies. Because the so-called 'Weimar triangle' (Germany, France and Poland) is often cited as the necessary critical mass to get Europe moving, France and Poland were chosen for the survey. Latvia was also selected as it represents another country in Central Europe that has been affected more directly by the war than many other European peers.

With this narrower geographical focus than the previous editions of the Security Radar, the study goes substantially beyond the original survey by adding a series of questions on the ongoing war and its effects on the respective countries' foreign policy, as well as on the international environment more generally. The data provide us with an opportunity to assess how much of a *'Zeitenwende'* for Europe we are currently witnessing.

Citizens' perspectives are central and important. Ordinary people deserve a 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 ground of European security policy. Decision-makers across all polled countries have to face new fears and anxieties among the public. At the same time, they can build upon broad public support for a pragmatic policy geared towards supporting Ukraine, 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. The third part zooms in on the four polled countries and draws attention to their idiosyncrasies. The final, analytical part summarises the key findings, takes a closer look at the prospects for european strategic autonomy, and reflects on the challenges ahead.

Research design

Public opinion may have a substantial impact on political decision-makers when facing security issues, particularly at a time of high tensions and major uncertainty. The aim of the 'Security Radar 2023' 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, before the beginning of the war, and the present 'Security Radar 2023', conducted one year later in four of the countries initially polled.

The 'Security Radar 2023' is a representative public opinion poll conducted in October 2022 among the resident population in four countries: Germany, France, Latvia, Poland.

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 in Ukraine. We thus compare people's attitudes in autumn 2021, prior to the invasion, with attitudes from autumn 2022, ten months into the war. The pollster Ipsos Public Affairs in Berlin was assigned to carry out the fieldwork.

The survey is based on the Security Radar 2022 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. mutual perception of countries' respective roles in current EU security policy;
7. perceptions of Russia's war against Ukraine.

Table 1: Sample overview

Country	N	Age Range Targeted Population
Germany	2,013	18–75
France	2,034	18–75
Latvia	2,012	18–75
Poland	2,004	18–65

Note: Statistical analysis was performed using Microsoft® Excel®

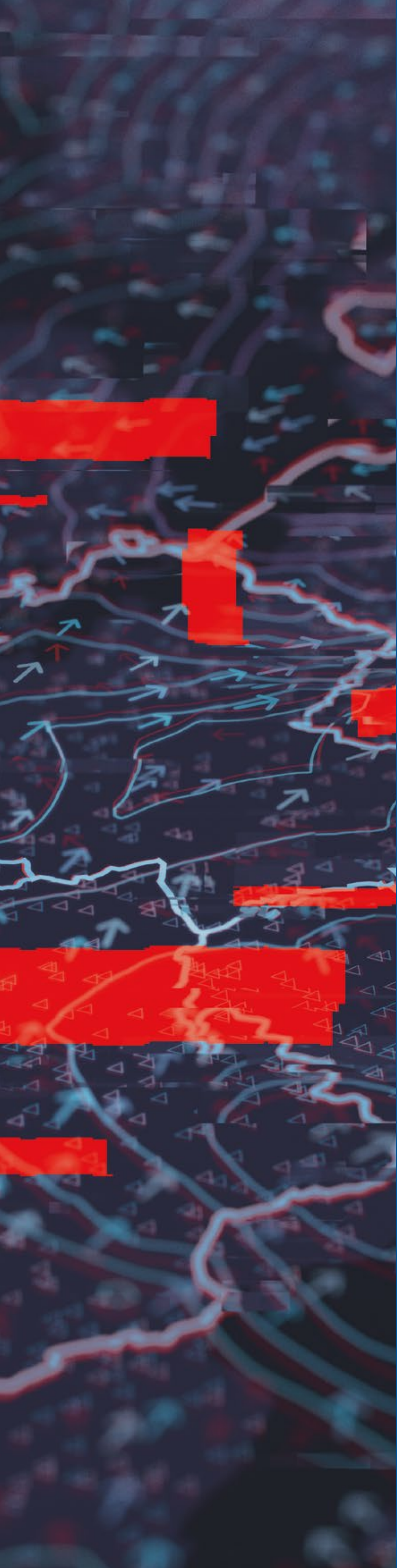
Additionally, descriptors were collected, including sociodemographic ones, interest in foreign policy and perceived overall priority of foreign and security policy for the respondents.

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 was conducted among the resident population via Computer Assisted Web Interviewing (CAWI, Ipsos Online Access Panels, Sampling: Quota Selection). Because of the different levels of accessibility of telecommunications for different age groups in particular countries, the age range of the targeted population varied (see Table 1). During data collection, quotas were applied for gender, age, region and education. Respondents who took less than half the median duration to answer the questionnaire were excluded from the data set to ensure data quality.

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
What?	**Representative public opinion poll in 14 countries:** Armenia, Austria, France, Germany, Italy, Latvia, Norway, Poland, Russia, Serbia, Turkey, Ukraine, United Kingdom, and the United States	**Representative public opinion poll in 4 countries:** France, Germany, Latvia and Poland
Who?	**27,500 respondents surveyed in 14 countries** Representative samples in each country	**8,063 respondents surveyed in 4 countries** Representative samples in each country
When?	**September-October 2021**	**October 2022**
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



Comparative trends

How do countries view the world?

Instruments of foreign policy

Europe’s place in the world

War in Ukraine

The way forward

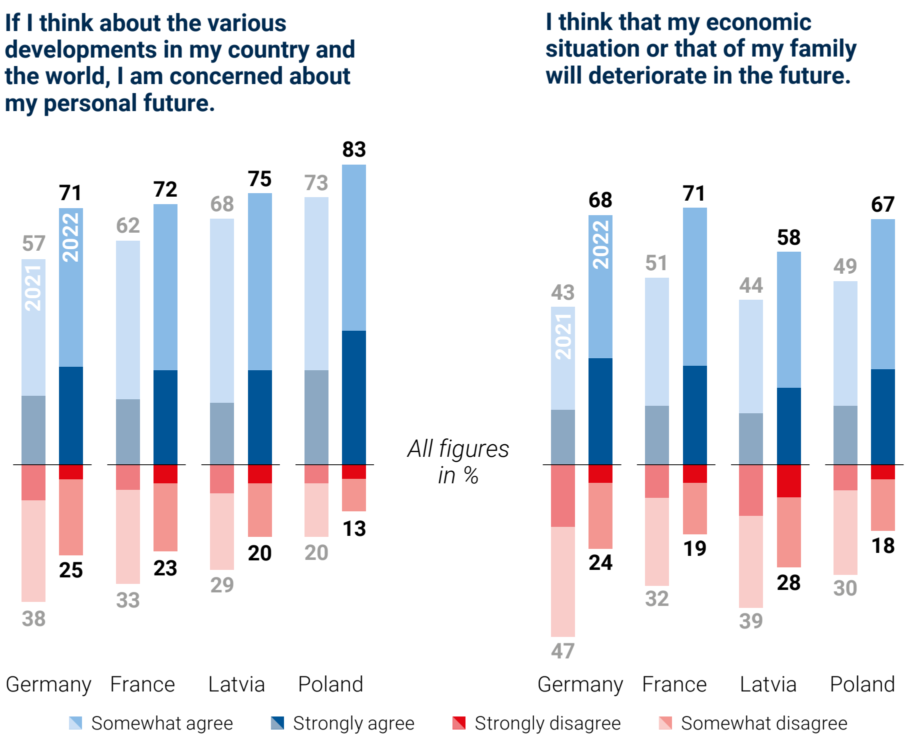
How do countries view the world?

Russia's war against Ukraine has had a strong impact on public perceptions, changing priorities and calling into question some previously held beliefs or notions taken for granted. War has returned to European awareness, and fears of military conflicts and even a nuclear escalation run high. Perceptions of threats emanating from Russia have increased across the board.

The views of the world and especially of international security captured in the four polled countries are very gloomy. This comes with no surprise, given the ongoing major interstate war in Europe and the danger of NATO and the EU becoming entangled in it. Fear of wars and conflicts has considerably increased in all countries, worrying over 85% of the respondents. The share of respondents who are 'very worried' is overwhelming, particularly in Latvia and Poland (close to 70%). At the same time, previously dominant challenges such as coronavirus pandemic, climate change, migration and international terrorism are still on people's radar, although they have lost significance in light of current developments.

Perhaps the main concern in relation to the ongoing war are its economic repercussions. Inflation and the rising cost of living worry more than 90% of respondents in all polled countries. Connected to that, the fear of economic crises is also pervasive, worrying more than 85%. The proportion citing this increased on average by a substantial 8% compared with the previous year. Latvian and Polish respondents are even more worried about economic crises than people in Germany and France.

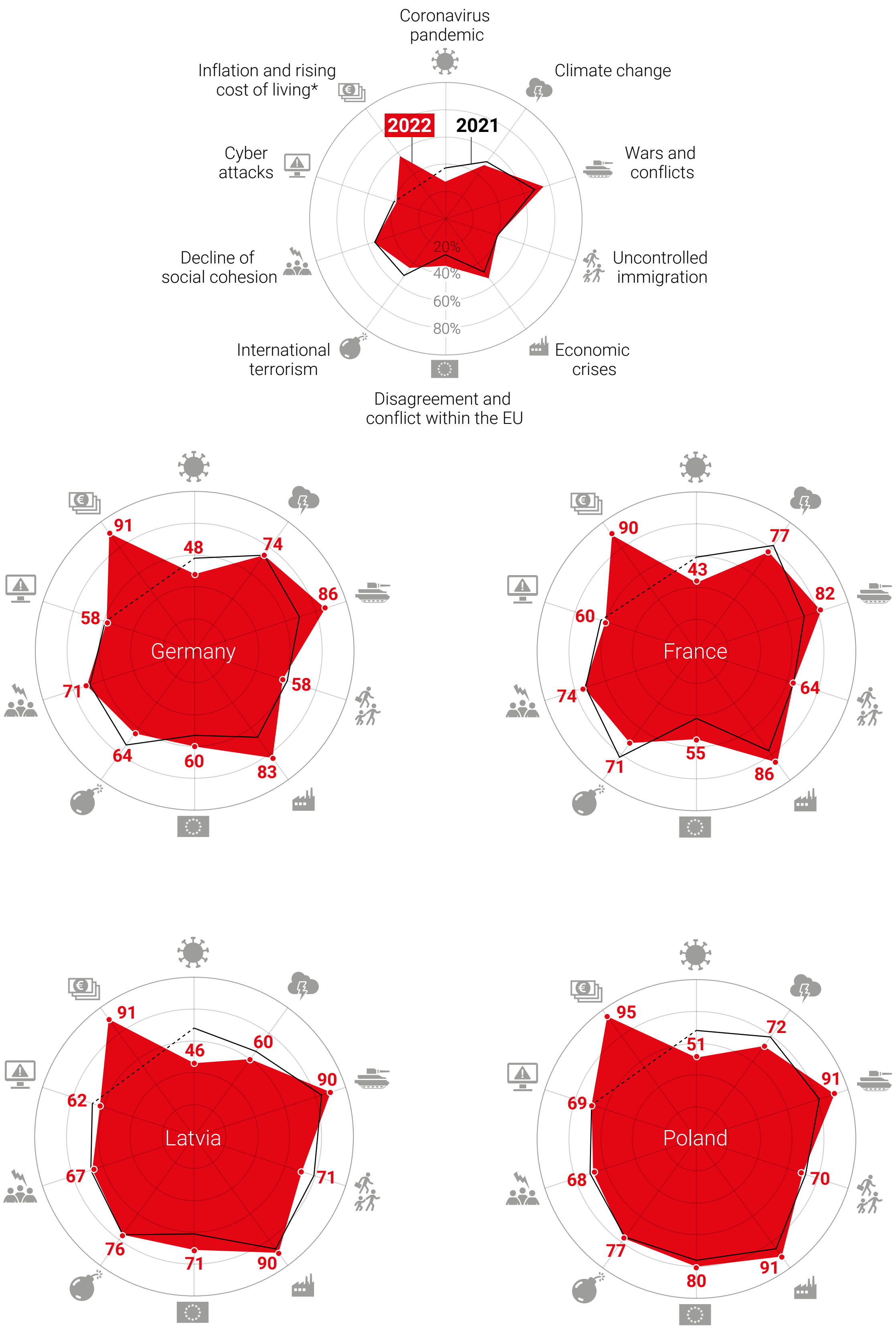
Notably, worry about disagreement and conflict within the European Union has also increased considerably since the start of the war, reaching 80% in Poland and 71% in Latvia. By contrast, although Germany (60%) and France (55%) are also rather alarmed by this issue, they are significantly less concerned, underlining the East–West divide in perceptions that we observe reflected in many aspects throughout the survey.



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

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

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



This item was included in 2022 and lacks comparative data.

Priorities

When it comes to the question of global foreign and security policy problems that should be prioritised, it is also evident that the so-called 'Zeitenwende' year of 2022 has left its mark. Military dangers and threats, 'hard security' issues are back in people's consciousness.

Geopolitical tensions and military build-ups have gained significantly in importance in respondents' eyes within one year. Russia's war against Ukraine has intensified fears and shifted priorities. Pandemic control and the global fight against climate change have taken a back seat between 2021 and 2022.

It is remarkable, however, how the ranking of priorities differs across countries. For German and French respondents climate change (still) ranks among the first three priorities, next to geopolitical tensions and fighting terrorism. But for Latvia and Poland, geopolitical tensions, military build-up and human rights violations are much more important.

A clearly expressed priority when it comes to improving security in Europe is the end of the war in Ukraine. Respondents from all four states are quite clear on this point. There is only a difference of about 10% between Latvian and Polish respondents who are of the opinion that the end of this war is a prerequisite for improving security in Europe (over 80%), and French and German ones (70% and 75%, respectively). This difference, albeit small, can be attributed to the different levels of concern as a result of geographical proximity and close cultural-historical ties (see graph on p. 34).

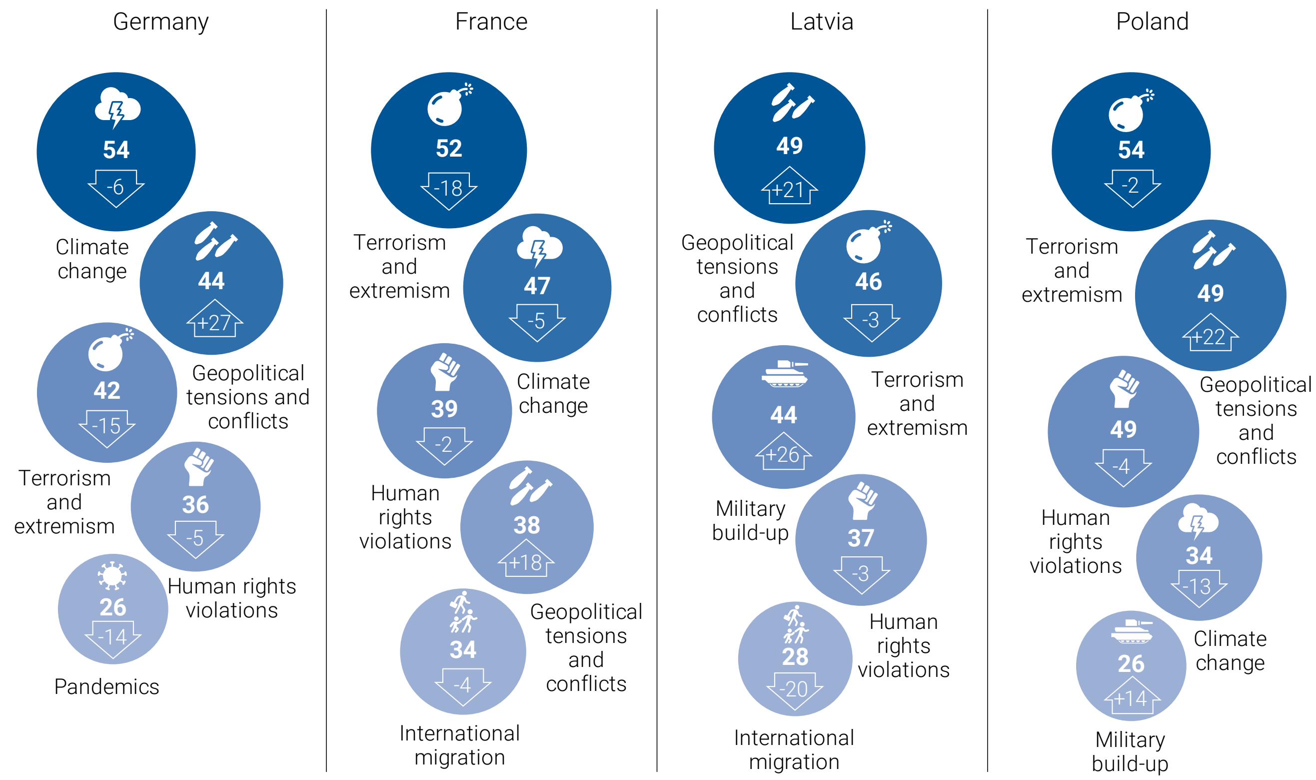
The bottom line of the section on fears and political priorities is fairly simple. Security threats associated with the war in Ukraine and the direct consequences of the war are high on respondents' agenda and therefore need to be addressed.

Raising concerns: the return of war into european awareness

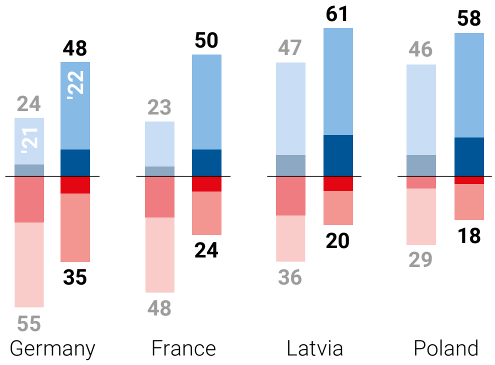
A first inkling of the state of concern in the four states surveyed is provided by respondents' assessment of their personal immediate future. Here we observe a considerable increase in concern across all four states, with the strongest increase in Germany (14%). In an even more striking shift, 25% more people in Germany believe that their economic situation will deteriorate in the future.

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

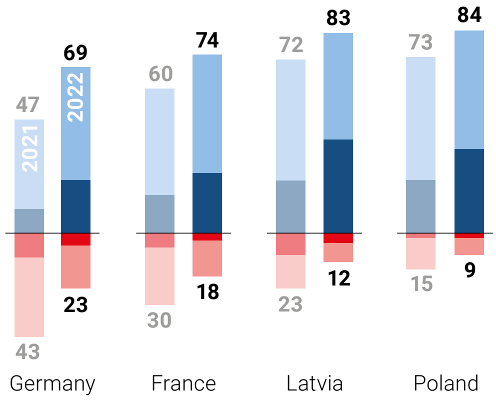
Respondents were asked to select and rank 3 items out of 9.
Top 5 ranked answers per country. Figures in arrows indicate change compared with 2021. All figures in %



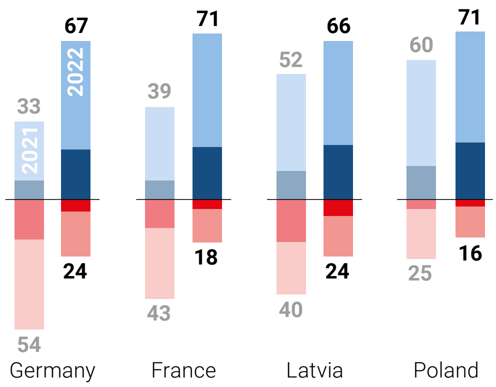
I consider a direct, military confrontation between Russia and the West to be likely.
All figures in %



I fear that wars and other conflicts will affect my country in the future.
All figures in %



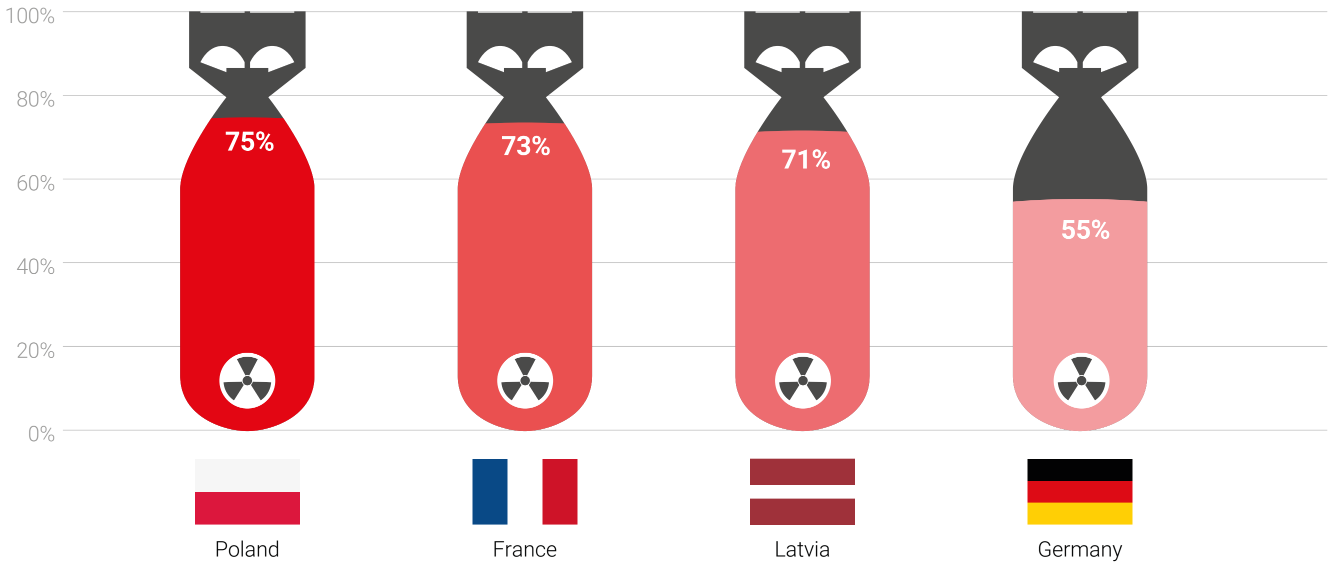
In view of increasing tensions between Russia and the West, I think new wars in Europe are likely.
All figures in %



Somewhat agree
Strongly agree
Strongly disagree
Somewhat disagree

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

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



Combined responses "strongly agree" and "somewhat agree"

in Germany "only"
55%
are worried about a nuclear escalation

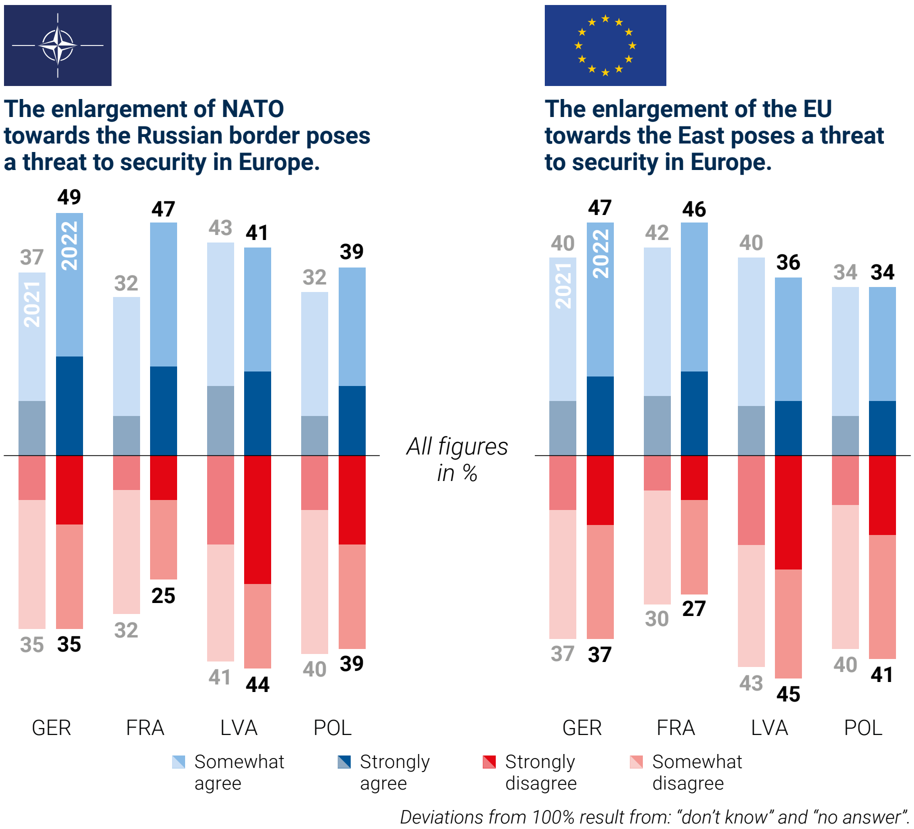
Russia's war against Ukraine has had a considerable effect on citizens' fears and concerns in the countries surveyed. Especially the probability of new wars in Europe in light of increasing tensions between Russia and the West rose in the eyes of poll participants, with the strongest shift in perceptions observed in Germany and France. Today all four countries show a fairly high level of concern, ranging from 66% to 71%. But a closer look at the changes between 2021 and 2022 shows an alignment of views between the four countries, starting from distinctly different levels. Whereas the two Eastern EU members, Poland and Latvia, were already very concerned before the start of the war in autumn 2021 (Latvia at 52% and Poland at 60%) and merely increased their level of concern, French and German respondents show a more fundamental change in their perceptions: the level of concern about new wars in Europe nearly doubled, from 39% to 71% in France, and more than doubled, from 33% to 67% in Germany.

A similar picture of shifted perspectives emerges when respondents were asked about the likelihood of a direct military confrontation between Russia and the West. Overall perception of the likelihood of such confrontation has increased strongly. Again, the differences between the two Western and the two Eastern countries polled are significant. Compared with 2021 we see a considerable increase of about 14% from an already high level in Poland and Latvia, where now absolute majorities (about 60%) consider a military confrontation between Russia and the West likely. In France and Germany, however, we can observe much greater shifts in threat perception. Whereas in 2021 just about 23% in France and 24% in Germany believed in the possibility of a direct military confrontation between Russia and the West, these numbers have nearly doubled in Germany to 48% and more than doubled in France to 50%.

When it comes to fears of nuclear escalation, there is no longer an East–West difference, but only a German 'special path'. Counterintuitively contrasting with the proverbial German 'Angst', German respondents are less worried than their European neighbours, albeit still at a high level. In Germany, 'only' 55% are worried about nuclear escalation, while in Poland 75% are afraid of such a scenario, in France 73% and in Latvia 71%. The survey phase in autumn 2022 was characterised by fairly frequent nuclear signalling on the part of Russian decision-makers. This is new for most respondents, as a comparable situation has not occurred since the critical moments of the Cold War. This, among other things, explains their fairly sharp worries (apart from the puzzling German deviation).

The question of NATO's eastward enlargement was one of the most divisive issues between Russia and the West before 24 February 2022. The security policy debate on this issue has been ongoing for at least 15 years, since the famous NATO summit in Bucharest in 2008 when Ukraine and Georgia were promised membership of the alliance. However, the total proportion of respondents across all four countries who see a threat arising from NATO enlargement towards the Russian border is 44%, compared with more than 36% who don't regard this as a threat. That is an increase from the 36% who strongly or somewhat agreed on this item last year. This shows a growing awareness of this issue, because in particular the number of respondents strongly agreeing grew in all four polled countries. In Germany and France it doubled in the span of a year.

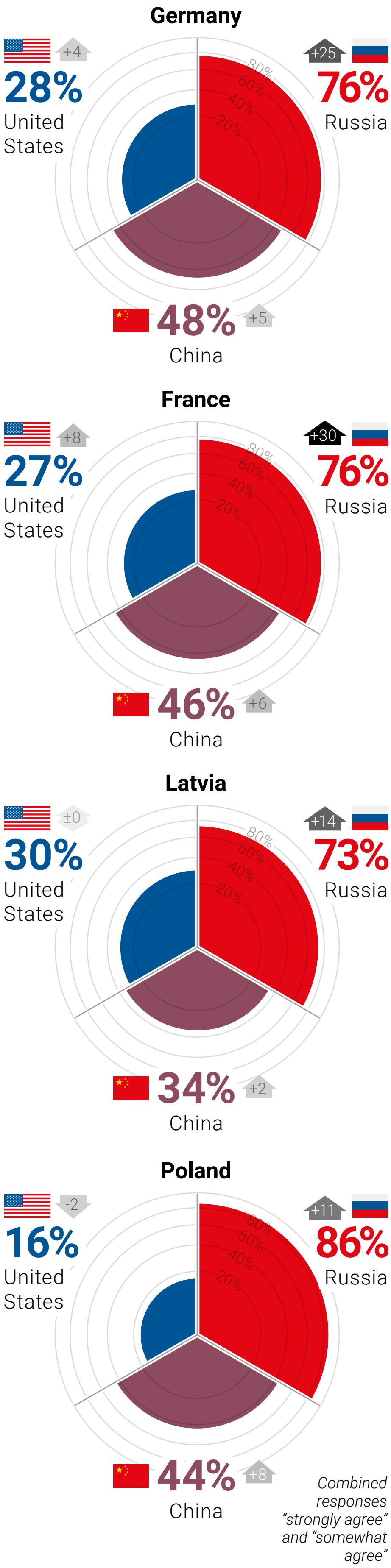
EU enlargement towards the East is seen as slightly less threatening compared with NATO enlargement. But here we observe an East–West divide. While in Poland and Latvia the relative majorities perceiving no danger in the EU's eastward enlargement remained almost unchanged compared with the 2021 survey, perceptions that this could constitute a security threat have solidified in Germany and France. Overall, however, opinions on both questions are split and the topic of potential NATO and EU enlargement remains highly divisive.



Summarising, it is fair to say that the possibility of a major inter-state war has returned to the consciousness of European citizens. Whereas this was already perceived as a threat in the East of the Union, it has now also reached Germany and France. Nonetheless, there remain differences. The threat of a direct military confrontation with Russia seems more likely to respondents in Latvia and Poland, where the level of concern reaches about 60%, while in France and Germany it is slightly lower at about 50%. An important aspect of this year's survey is that the nuclear component is now clearly part of the threat perception.

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

Figures in arrows indicate change compared with 2021.



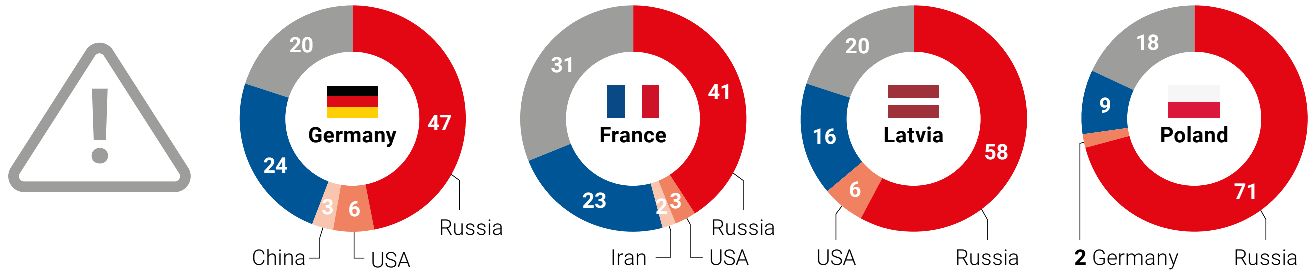
Actors posing a security threat

Geopolitical tensions and security threats are usually associated with specific actors. We asked people whether and to what extent they see Russia, the United States and China as threats to security in Europe. What is not surprising is the clear classification of Russia as a threat to security in Europe in all four states, ranging from 86% agreement in Poland to 73% in Latvia, with 76% in both Germany and France. The increase within one year is also clear, most strongly in France, by a full 30%, and on average in all four states by 19%.

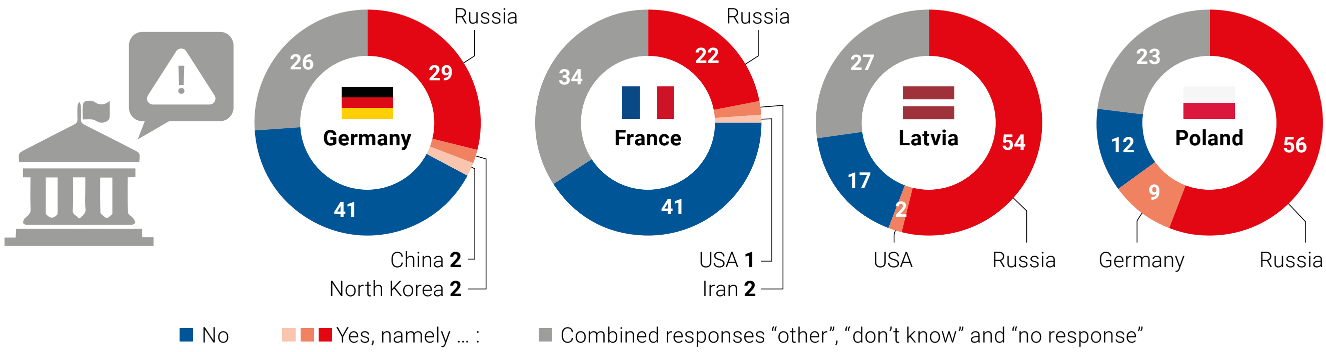
In the case of the United States, one might have expected the opposite trend, but this did not happen. Overall, just like a year ago, absolute majorities do not see the United States as a threat. Although there is no pronounced dynamic, there is a visible distinction between East and West. In Poland, the number of those who consider the United States a threat to security in Europe is lowest and fell slightly from 18% to 16%. In Latvia it remained unchanged at a relatively high 30%. In Western Europe, on the other hand, we have a slight increase from 24% to 28% in Germany and more noticeably in France from 19% to 27%. Notably, people's opinion became stronger, with more respondents strongly agreeing in 2022 than in 2021 that the United States is a danger to peace and security in Europe.

A bigger surprise here is the response to a third actor, China, which is increasingly being discussed as a global actor in Europe. Here we have relatively moderate increases in an affirmative response to the question. China is now considered to pose a security threat by 43% on average across these four countries, compared with 38% in 2021. Increases in perception of a threat emanating from China took place across all countries surveyed. The largest jump, from 36% to 44%, is observed in Poland. This development may have several causes. It could be a reaction to the tensions around Taiwan, the partnership between China and Russia or the result of a heightened political debate on China, which portrays the country as an adversary.

In your opinion, is there a country that constitutes a threat for your country?
All figures in %



Does your government portray one country as an enemy of your country?
All figures in %



For "Yes, namely..." respondents were given a list of countries to choose from, as well as the category "other".

When asked whether there is a country that constitutes a threat to one's own country, most people name Russia. Large absolute majorities in Poland (71%) and Latvia (58%) choose this country. In France (41%) and Germany (47%) the threat perception of Russia is also strong but falls short of an absolute majority. Coming a far distant second is the United States: some 6% in Germany and Latvia consider the country a threat. Germany is named by 2% of respondents in Poland. Notably, sizeable and similar shares of respondents think their own country does not have an enemy or do not have an opinion on the matter – in France these two groups together form a majority.

We posed a similar question about whether respondents' own governments portray a particular country as an enemy. Here we observe a clear East–West divide. In the West, large relative majorities (41%) say that no country is portrayed as an enemy or do not have an opinion on the matter (around 30%). 'Only' 29% in Germany and 22% in France think that Russia is being portrayed as an enemy by their respective governments. In Poland and Latvia, however, the picture is reversed. Only minorities think that their government does not designate a particular country as an enemy, while solid majorities of over 50% think it does, namely Russia. Germany is mentioned by 9% in Poland. Only marginal minorities name the United States across the sample.

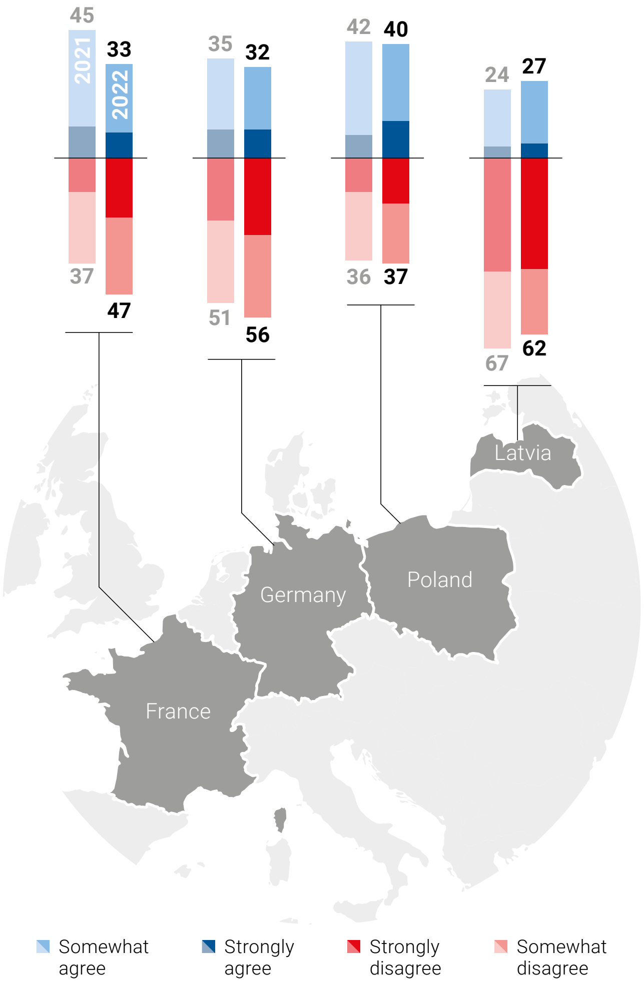
9%
in Poland think that Germany is being portrayed as an enemy by the government

Foreign policy instruments

We examine attitudes to a series of foreign policy instruments, ranging from diplomacy to economic sanctions and military intervention. We differentiate between the effectiveness and legitimacy of various means and look at the role attributed to international organisations. Specific instruments to support Ukraine, such as weapons deliveries or potential EU and NATO membership are supported to different degrees and are sometimes polarising.

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

All figures in %

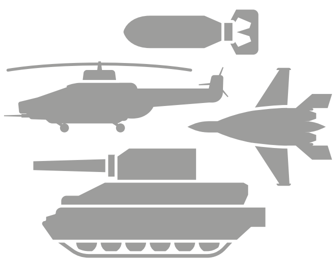


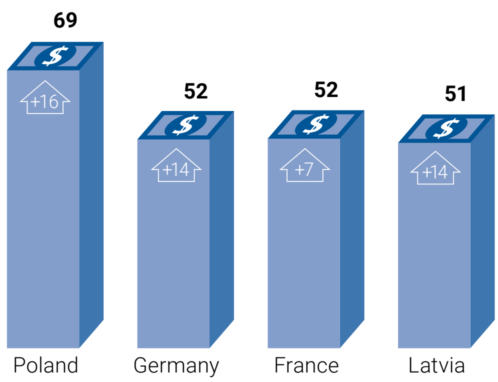
Military interventions and military spending

Military issues dominate the European news as never before in recent decades. The combat values of large military equipment are discussed and large military expenditures are decided by respective governments throughout Europe. The war and debates on it in the four surveyed EU and NATO members have left their mark on people's perceptions. Throughout the sample a majority agreed with the statement 'my country should increase military spending': a clear majority in Poland, with 69%, and narrow majorities in Latvia (51%) and in France and Germany (both 52%). Compared with the previous year, we have clear increases of about 15% in Germany, Poland and Latvia. In France, on the other hand, the increase is comparatively moderate at 7%. But does the endorsement of increased military spending translate into a willingness to deploy one's own armed forces abroad, especially in conflicts?

My country should increase its military spending.

Countries ranked in descending order.
Figures in arrows indicate change compared with 2021.
All figures in %





Combined responses "strongly agree" and "somewhat agree"

The question about the necessity of military intervention in conflicts offers an interesting picture. We have two groups, with Germany, France and Latvia on one side rejecting military intervention in conflicts, and with Poland on the other, endorsing them with a relative majority of 40%. However, when push comes to shove, the Polish preparedness to intervene militarily in Ukraine is far less pronounced than this rather general commitment (see p. 23). In Latvia, a moderate increase in those who would welcome military intervention took place in the same period.

German rejection of military intervention in conflicts has risen from 51% to 56% within a year. But what is even more remarkable is a complete change of mood in France. Whereas before the war a relative majority of 45% approved of military intervention in conflicts, one year later the figure dropped by 10% and a relative majority of 47% rejects such interventions.

In France, before the war

45%

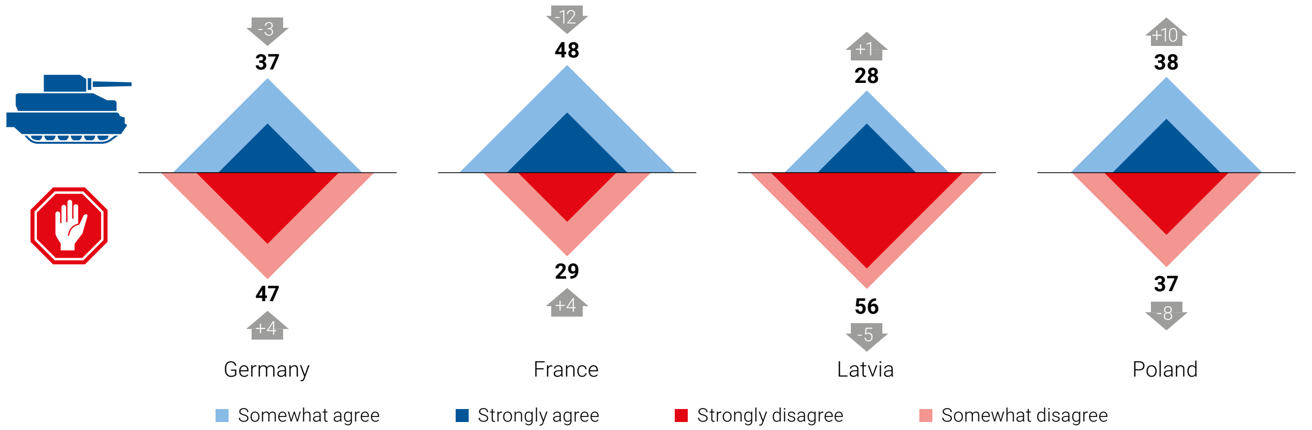
approved of military intervention in conflicts, but one year later

47%

reject such interventions

To ward off dangers to my country it is permitted to carry out military actions in other countries.

Figures in arrows indicate change compared with 2021. All figures in %



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

The French case is also interesting regarding a change in opinion on the permissibility of military action abroad for the sake of warding off dangers to one's own country. Before the war 60% endorsed such military deployment, but one year later only 48% do so.

In Latvia, considerably fewer people than a year ago, but still an absolute majority, oppose military action abroad for the sake of warding off dangers, with an overwhelming share of people having a strong opinion on the matter. Rejection of military action abroad also went down in Poland, which is the only country that at the same time significantly increased its approval.

One can conclude that while the French became much more sceptical of military intervention per se within the span of a year, they still clearly favour military engagement to defend against threats to their own country. The other three polled countries, by contrast, clearly reject this stance (Germany, Latvia) or are split on the matter (Poland).

56%

in Latvia oppose military action abroad for the sake of warding off dangers to their country

Foreign policy instruments

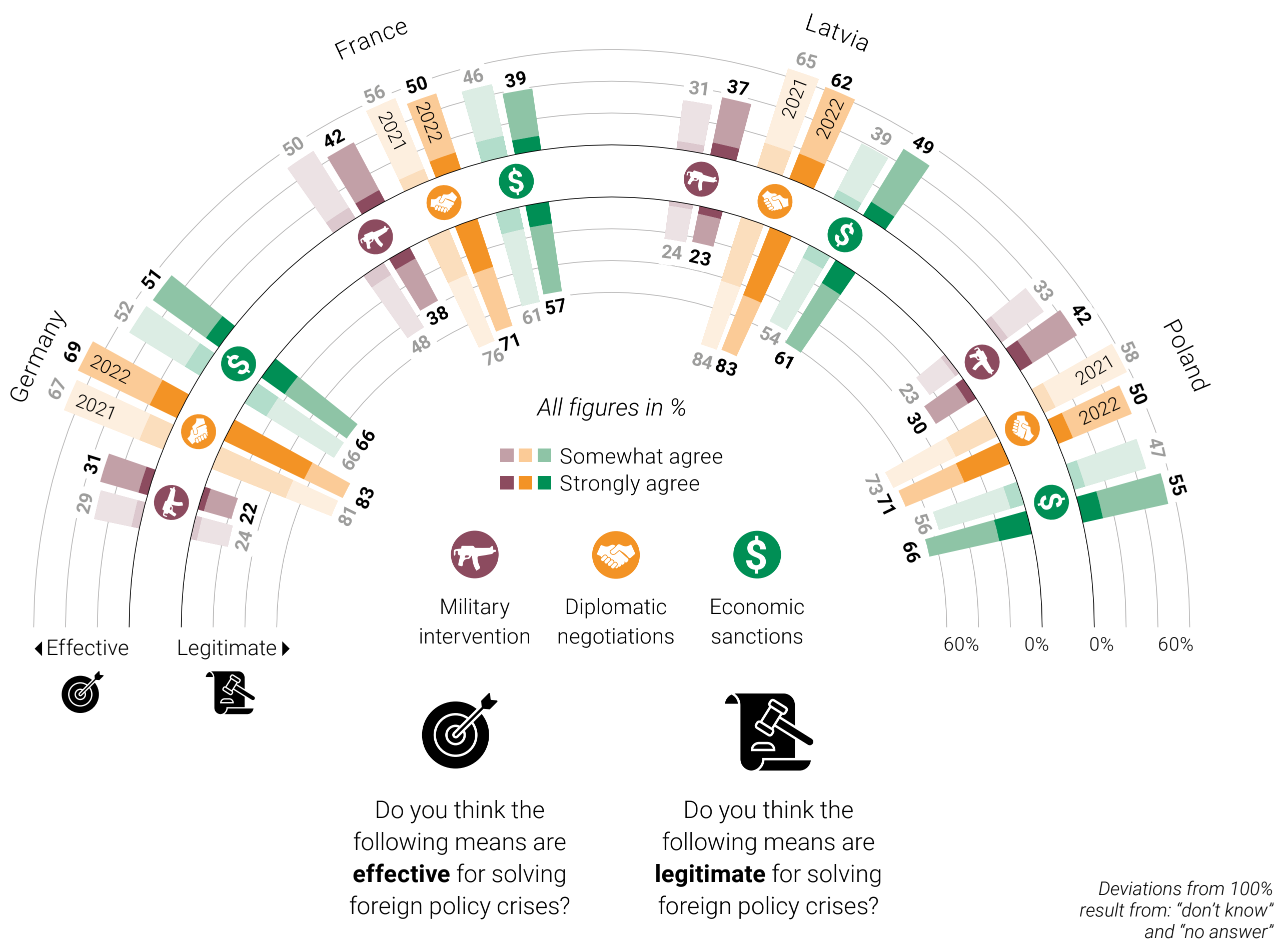
With regard to the means of solving foreign policy crises, two important observations can be derived from the survey results. First, military intervention remains controversial, considered largely illegitimate but a somewhat effective means of solving crises. Second, diplomacy is the most endorsed foreign policy tool across the board, followed by economic sanctions.

Perceptions of the effectiveness of military means increased in all countries bar France, but overall no absolute majorities can be found. French respondents became strongly disillusioned (a decrease from 50% to 42%). As for the legitimacy of military interventions, only Polish respondents consider them more legitimate than a year ago. The French again show disillusionment with the legitimacy of military means – we observe a decline of 10% compared with the previous year. Notably, German respondents exhibit the strongest rejection of military means across the sample, in terms of both effectiveness and legitimacy. The so-called 'culture of restraint' is still pervasive in the country.

Diplomatic negotiations rank highly among all respondents and are considered the most effective and legitimate means of solving foreign policy crises. However, diplomacy is considered rather legitimate than effective. Of all countries only in Germany did public opinion become more favourable towards diplomatic negotiations compared with last year.

The question of the effectiveness of economic sanctions is polarised; the shares of proponents and opponents are comparable across countries. Opinions on the effectiveness of sanctions remained roughly the same in Germany as one year previously. In France fewer people believe in the effectiveness of sanctions compared with the previous year, in Latvia and Poland more. The same trend can be observed in the matter of the legitimacy of sanctions. However, the question is not as polarised as the issue of effectiveness: majorities across the polled countries believe sanctions are a legitimate means of foreign policy.

Public assessment of different foreign policy means in response to crises is instructive when thinking about the most acute security issue in Europe, the war in Ukraine. What do respondents think about different instruments for supporting Ukraine?



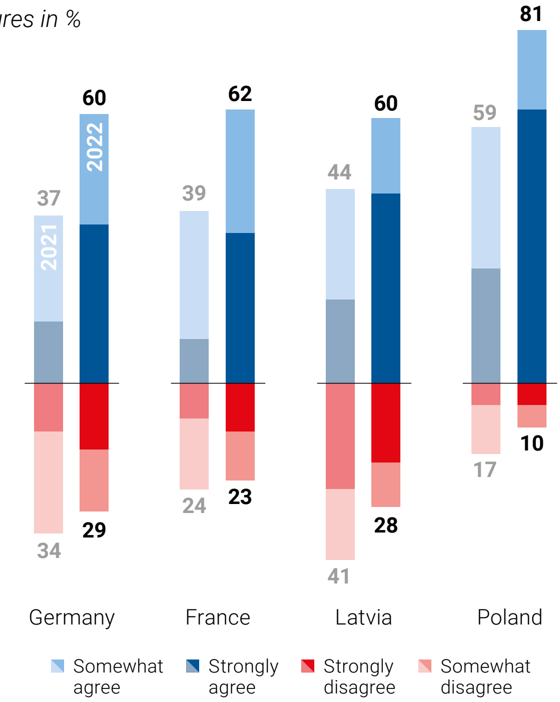
Instruments for supporting Ukraine

Concerning the role of third countries in Russia's war against Ukraine, we examined a series of instruments ranging from a widening of the sanctions, more weapons deliveries and, finally, sending soldiers to the war. But we also subsumed the questions on allowing Ukraine to become a member of EU and NATO in this section, because this is also part of the package of support for the country in its defence. Because only sanctions and EU and NATO accession had been an issue before 24 February, these questions allow for a comparison between 2021 and 2022.

Sanctions against Russia

Public opinion about the expansion of sanctions against Russia is particularly relevant for political decision-makers in view of numerous sanctions packages imposed by the West against Moscow and the explicit acceptance of negative effects by those who have imposed them. What we see is clear support for expanding sanctions. While the mood in 2021 was still undecided, especially in Germany, France and Latvia – with very small relative majorities in favour of increasing sanctions pressure on Russia – the situation is completely different now since the outbreak of the war. The three states that were still reluctant are now clearly in favour, in the 60% range. Poland, as with some other Russia- and Ukraine-related issues, is in a different segment, with 81% approval and a very high proportion of respondents approving strongly.

Sanctions against Russia should be widened.
All figures in %



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

Ukraine - NATO and EU accession

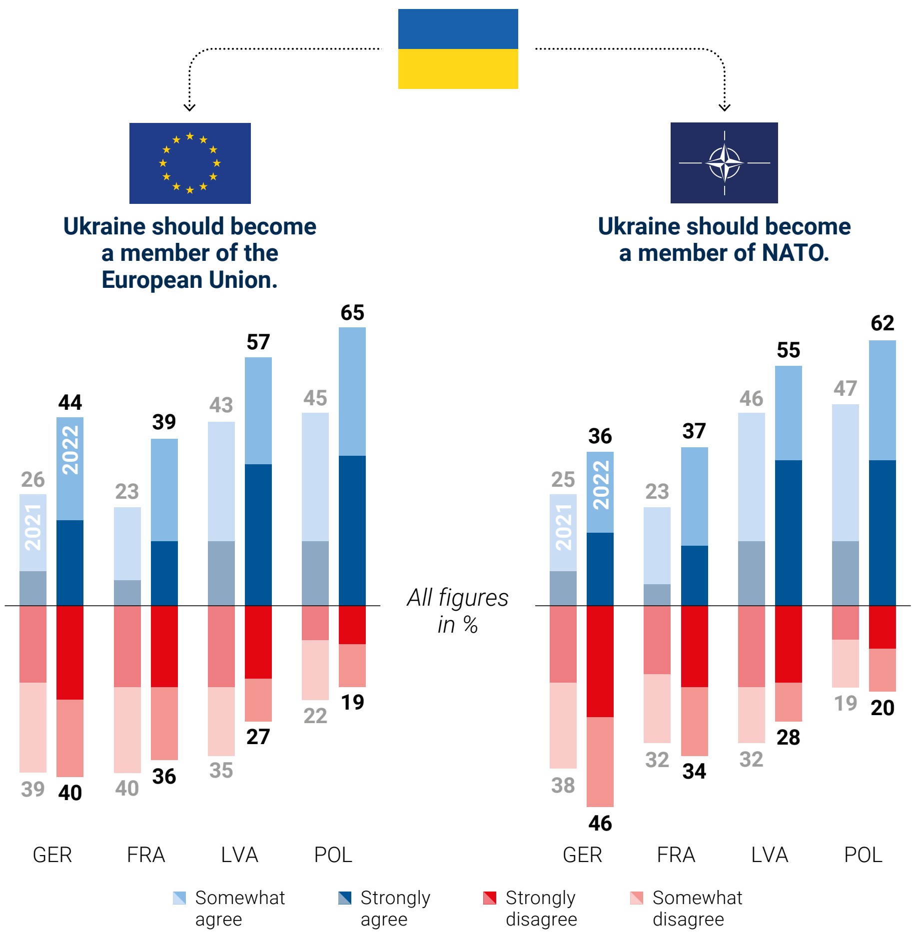
When asked whether Ukraine should become a member of the European Union we observe the lowest support in France (39%) and the highest in Poland (65%). Given that Ukraine received EU accession candidate status during the hostilities in 2022 it is interesting to note that support for its EU membership is still divided between East and West. High levels of support in Poland and Latvia contrast with relatively low levels in France and Germany, where the numbers of those who oppose Ukrainian EU membership aspirations almost matches the number of endorsers.

However, it is important to mention that in both Germany and France the number of those in favour of Ukraine's EU and NATO membership has increased significantly. In Germany, it has risen from 25% to 36% for Ukrainian NATO membership and from 26% to 44% for EU accession; in France, from 23% to 37% and 39%, respectively. At the same time, the high number of respondents in both countries who strongly oppose both memberships for Ukraine shows that opposition to enlargement remains strong, too. In Germany, the number of opponents of Ukraine's accession to NATO is still higher than the number of supporters.

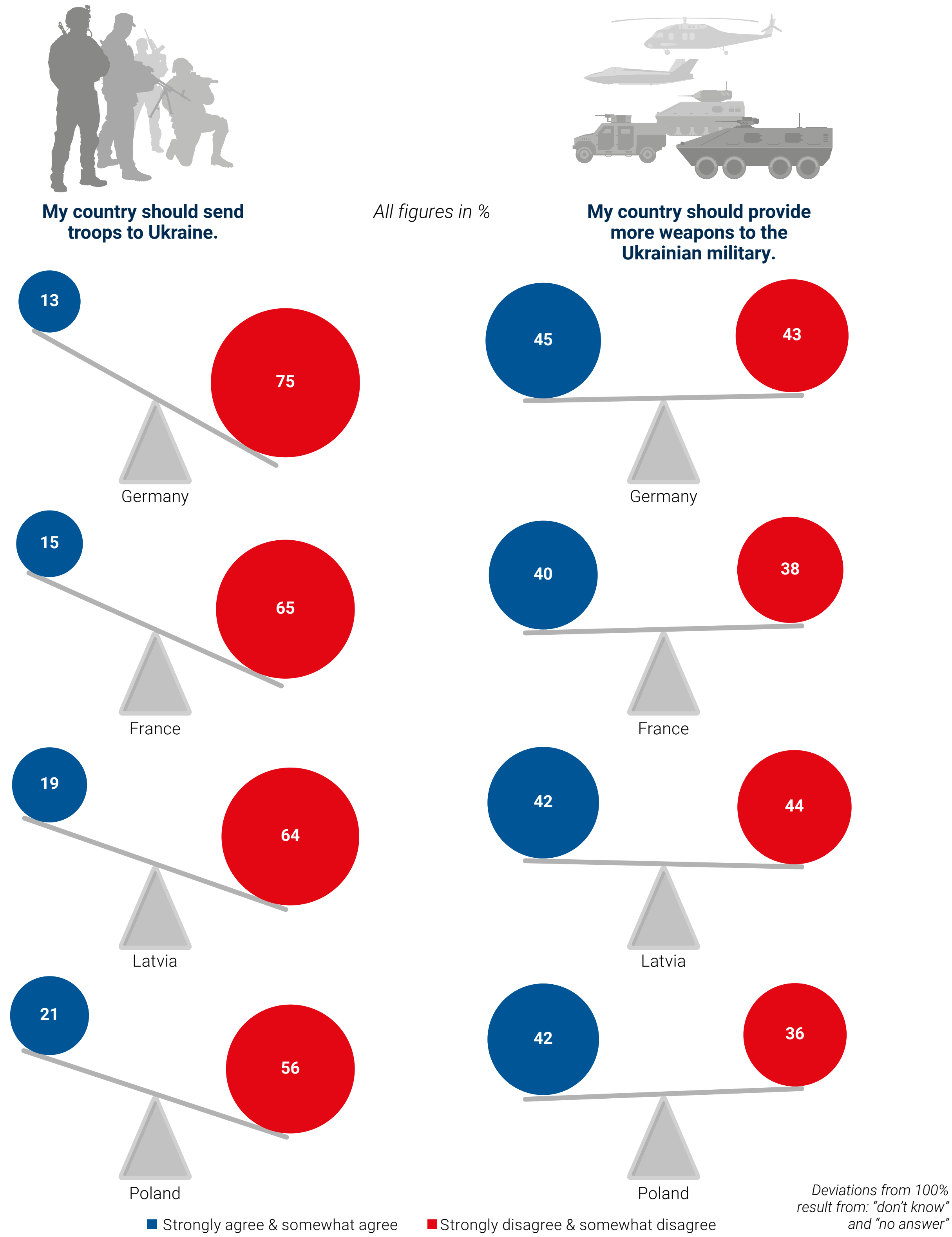
Weapons delivery

In addition to assessments of Ukraine's medium- to long-term accession prospects for NATO and the EU, we added two new items to the questionnaire on current processes of military support for Ukraine. The first concerns an ongoing issue in this war, namely Western arms deliveries to Ukraine, in which all four countries surveyed participate to varying degrees. Specifically, we asked about agreement or disagreement with the following statement: 'My country should provide more weapons to Ukraine.'

The answers illustrate a split. By country, the distribution between supporters and opponents looks very balanced. In the German case, we see the highest percentage of supporters of arms deliveries, at 45%, but these are contrasted by 43% with opposing views, with the proportion of those who strongly reject further arms deliveries being particularly high. In Latvia and France we have a similar response pattern. Only in Poland does the number of supporters (42%) outweigh the number of opponents of further arms deliveries (36%), but the fact that more than a third of the Polish population disagree with more weapons deliveries to Ukraine is still remarkable.



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



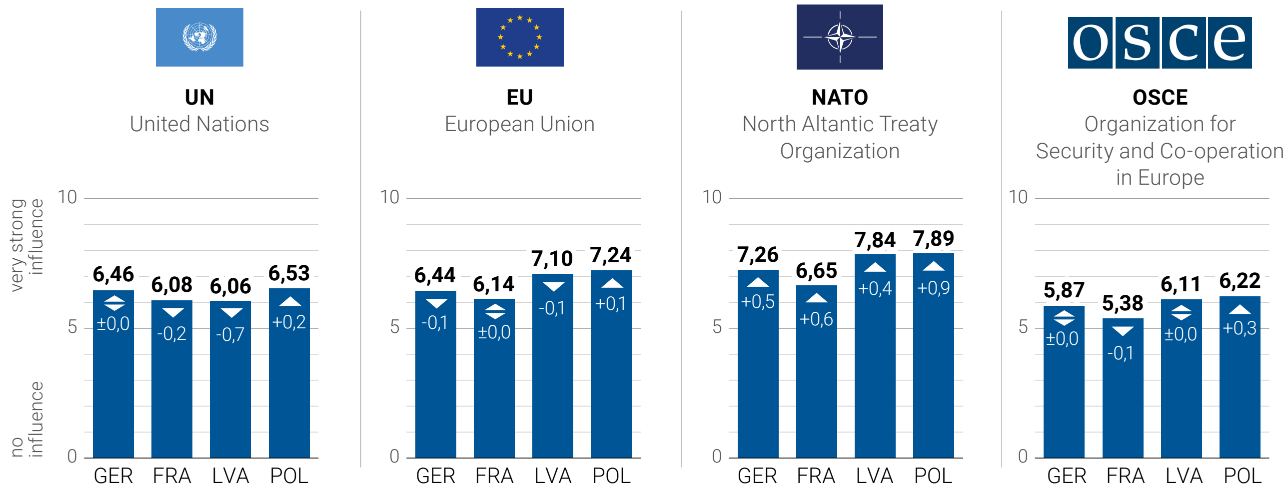
Sending troops to Ukraine

The second item added to the survey concerns an issue that hasn't been promoted publicly so far, but was a factor in the debate leading up to the Russian attack against Ukraine: the possible deployment of Western troops. We asked whether people are prepared to send troops from their respective countries to Ukraine.

An absolute majority of respondents disagreeing with this statement is all over the sample, with 56% in Poland being the smallest margin versus just 21% supporting such a policy. The other three countries show even clearer refusal ranging from 64% against sending one's own troops in Latvia, to 65% in France and 75% in Germany.

How much influence do you think the following organisations have on international political events? Please also indicate if you are not familiar with an organisation.

All figures show means. Figures in arrows indicate change compared with 2021. Respondents who do not know the respective organisation are not counted.



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

	UN	EU	NATO	OSCE
GER	54% (+3)	53% (+1)	45% (+5)	48% (+2)
FRA	58% (-6)	53% (-10)	47% (+4)	44% (-7)
LVA	63% (+1)	65% (+1)	60% (+6)	55% (+5)
POL	65% (+6)	59% (+5)	72% (+13)	58% (+7)

Role of international organisations

Turning from the battlefield to the components of the multilateral order, how has public opinion on and trust in international organisations changed, and what is the desired influence they are supposed to exert?

Here, a comparison with the 2021 survey reveals that NATO has gained influence in the perceptions of respondents. The rise is not dramatic, but in view of the almost unchanged values for other organisations, it is a remarkable sign of the revitalisation of the alliance.

Further empirical evidence in this respect is provided by the question of whether certain international organisations should play a greater role in the future. In all surveyed countries respondents want a stronger role for NATO, albeit at different levels. NATO scores particularly well among Polish respondents, with a desired increase in its role of 13% compared with the previous year, meaning that 72% want a stronger NATO role. This is a remarkably high value compared with 45% in Germany, for instance. Moreover, it is noteworthy that in the Polish case the desire for an expanded role extends to all the organisations surveyed. This is also the case, to a smaller degree, in Germany and Latvia, while France is the only country in which respondents – surprisingly – want the OSCE and the EU to play a smaller role.

Europe's place in the world

Respondent's views suggest the emergence of two blocks: Russia and China, on one side, and the United States and the EU on the other. The interests of these two blocks are viewed as contradictory. On one hand, people realise the benefits of economic interdependences among countries, but on the other they are prepared to decouple from Russia and, to a lesser extent, China. Issues of values versus interests in foreign policy, pragmatic cooperation with non-like-minded states and international responsibility are assessed differently across the sample.

Interdependence and cooperation

Across our sample, a disquieting share of people, just like in 2021, are dissatisfied with their country's status in the world. In all countries bar Germany relative majorities of respondents think that their country does not have the status it deserves. This trend is most pronounced in Poland, where 60% think their country does not have adequate status – only 24% disagree. This grievance may put a strain on issues of leadership and cooperation in the EU.

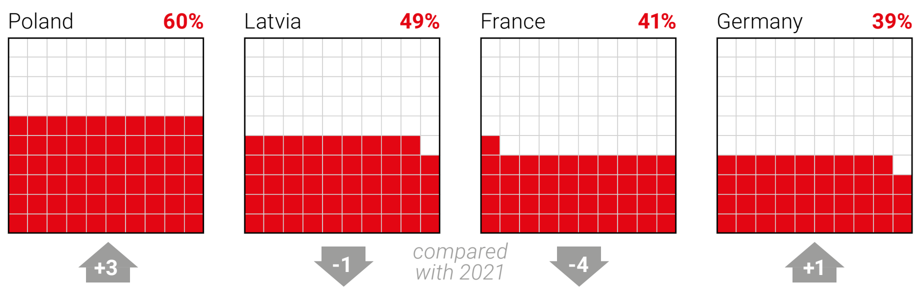
At the same time, overwhelming majorities in all countries are aware of interdependencies between their respective countries and neighbours. Over 60% in Poland and Germany believe that the prosperity of their country is linked to the well-being and positive development of other countries. In France it is 56%. In small Latvia the share is even 70%. Perceptions of interdependence have hardly changed since 2021, although in Germany it increased by 6%.

Linked to the widely-shared awareness of economic interdependence is the common desire across all four polled countries to cooperate more closely with the EU and the United States. National differences are striking, though. For instance, Polish respondents are most eager to cooperate more with the United States (an overwhelming 76% agree), while in traditionally more US-sceptical France opinion is split (43% want more cooperation, 36% oppose it). Polled Latvians greet collaboration with the EU enthusiastically (74%), but are less keen about the United States (some 56% want more cooperation). Overall, in Latvia and Poland bigger shares of respondents endorse closer cooperation with the EU and the United States than in Germany and France.

Compared with 2021, respondents' desire for increased cooperation with the United States did not change much; only in France did it go down, by 10%, possibly reflecting US scepticism. More alarmingly, in 2022 respondents were less convinced than in 2021 of the necessity for more cooperation with the EU. Only in Germany did support for more cooperation with the EU slightly increase, while in the other three polled countries it went down. This development corresponds to a heightened perception in all four polled countries that their national interests are at odds with the interests of the EU (see p. 38 as well as p. 10). This may put a strain on EU unity.

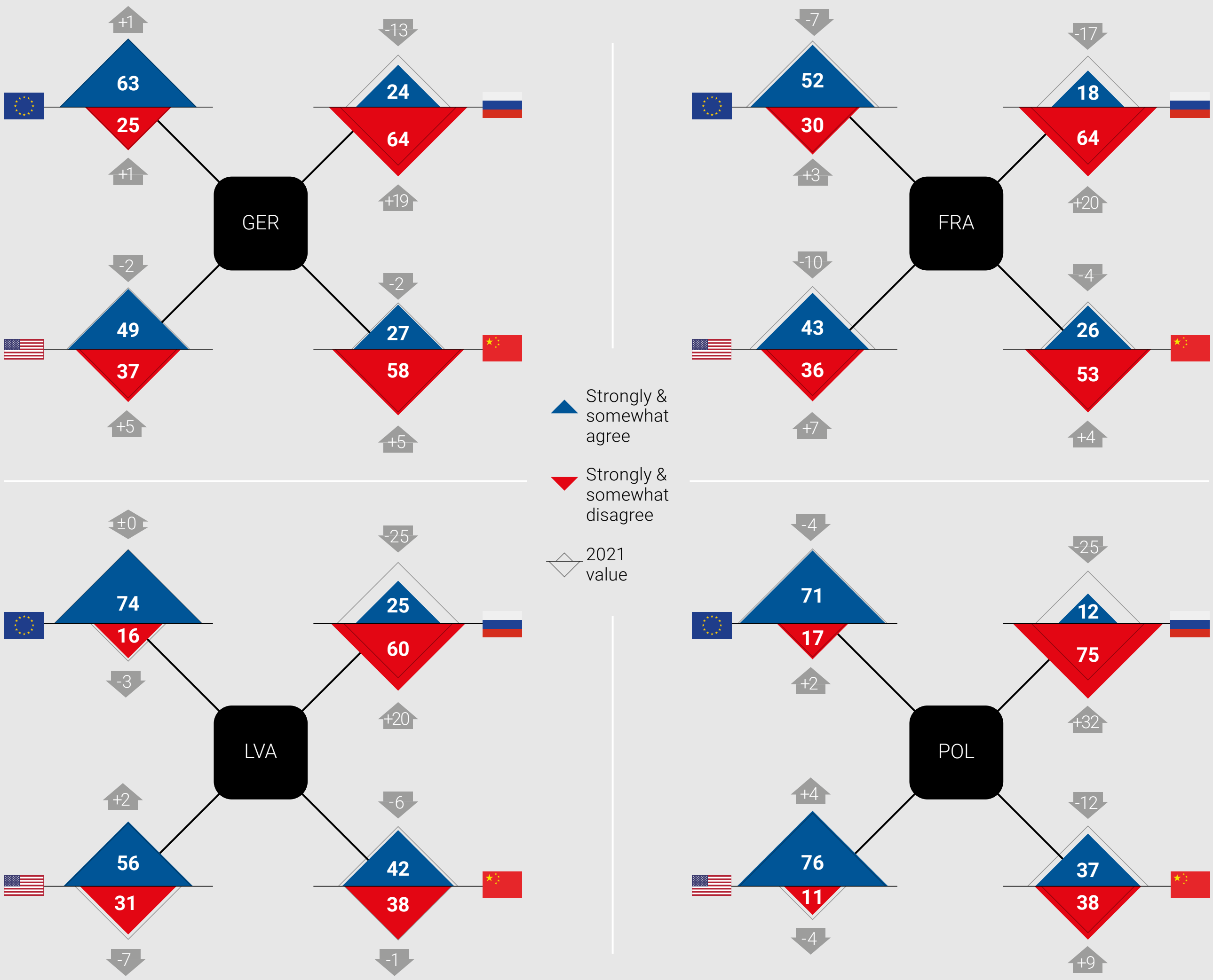
While generally speaking cooperation with the EU and the United States is welcomed, the opposite picture emerges with regard to Russia and China. Large shares reject increased cooperation with these two countries. Cooperation with Russia is rejected across the board by large majorities (most notably in Poland, by 75%), with most respondents having a strong opinion. For instance, in Poland a whopping 60% 'strongly disagree' that there is any need to cooperate more with Russia; in Germany, France and Latvia strong rejection is shared by around 45%.

In my opinion, 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")



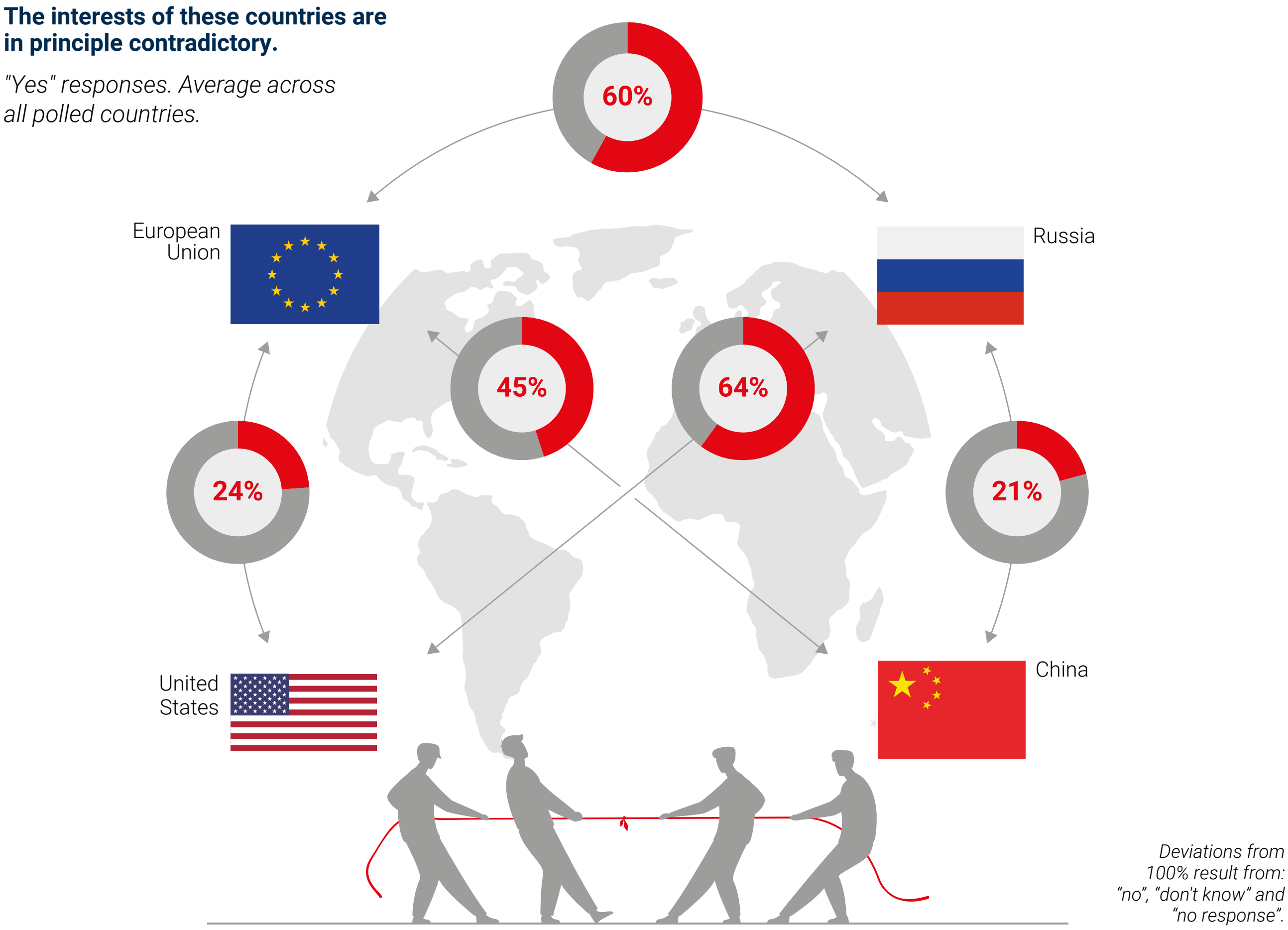
Compared with 2021, before the war started, the desire to cooperate with Russia fell dramatically, most strongly in Latvia, where it halved (from 50% to 25%). Interestingly, the disillusionment with Russia is felt much more in Poland than in Germany. In autumn 2021, several months before the start of the war, respondents in both Poland and Germany had almost identical opinions: 37% supported more cooperation with Russia and around 44% rejected it. In autumn 2022, however, in the midst of the war, a ten percentage points difference emerged: 64% of Germans reject cooperation with Russia, compared with 75% in Poland; 24% in Germany still want to cooperate with Russia, compared with only 12% in Poland.

My country should collaborate more with these countries than before.
Figures in arrows indicate change compared with 2021. All figures in %



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

On cooperation with China, support went down significantly in Poland and Latvia compared with 2021 (by 12% and 6%, respectively). But opinion is almost evenly split, with almost as many respondents wanting more cooperation as opposing it. By contrast, German and French respondents are much more China-sceptical and absolute majorities reject closer cooperation, even more than a year ago. This picture corresponds to the heightened threat perception emanating from China, with the biggest jump noted in Poland (from 36% to 44%, see p. 16).



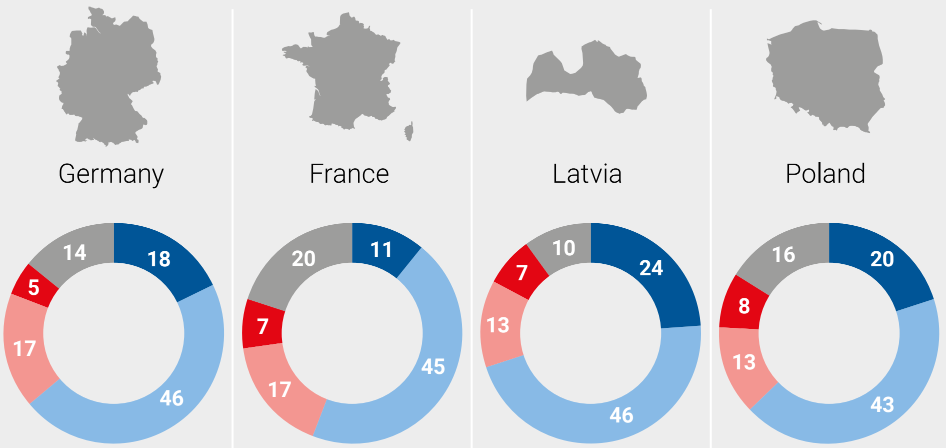
Divergence of interests between the EU, the United States, Russia and China

How does public opinion assess interests in relation to the major global players: the EU, the United States, China and Russia? Do they see divergence or convergence? Regarding the interests of EU and China, a recurrent East-West division of opinion is visible. Around 50% of respondents in Germany and France think the interests of the EU and China are contradictory; in Latvia and Poland the shares are smaller, at around 40%. Notably, a large group of respondents in Poland and Latvia do not have an opinion: the share of 'don't knows' is around 33%. Perceptions have not changed significantly since 2021.

In a strong convergence across countries, most respondents perceive EU and US interests as aligning, just like one year ago. By contrast, the interests of the EU and Russia, as well as those of the USA and Russia, are widely perceived as in opposition. The perceived contradiction of US and Russian interests increased in all countries, above all in Germany and Poland (by 8% and 9%, respectively). Regarding the interests of the EU and Russia, disillusionment has been most pronounced in Germany: whereas in 2021 only 46% believed that European and Russian interests were contradictory – the lowest figure across the four countries – in 2022, the share had increased to 60%, almost reaching the perception in its East European neighbours. France remained the only polled country in which only about half of respondents think that EU and Russian interests are contradictory. On the other hand, many have no opinion at all (28%, much higher than elsewhere).

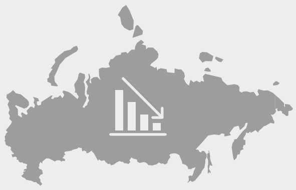
Chinese and Russian interests are viewed as coinciding: majorities do not agree that they are in opposition. In addition, in all countries fewer people than a year ago now believe that the interests of these two actors clash. The strongest opinion, and also the one that has shifted most, is found in Germany, with an absolute majority of 52% disagreeing that interests of China and Russia contradict one another, up from 38% a year ago.

Overall, opinions on alignment of interests suggest a perception of two blocks: the EU and the USA on one side, and Russia and China on the other. The biggest shift in perceptions occurred in Germany, demonstrating (yet again) that the so-called *'Zeitenwende'* is leaving its mark on public opinion.



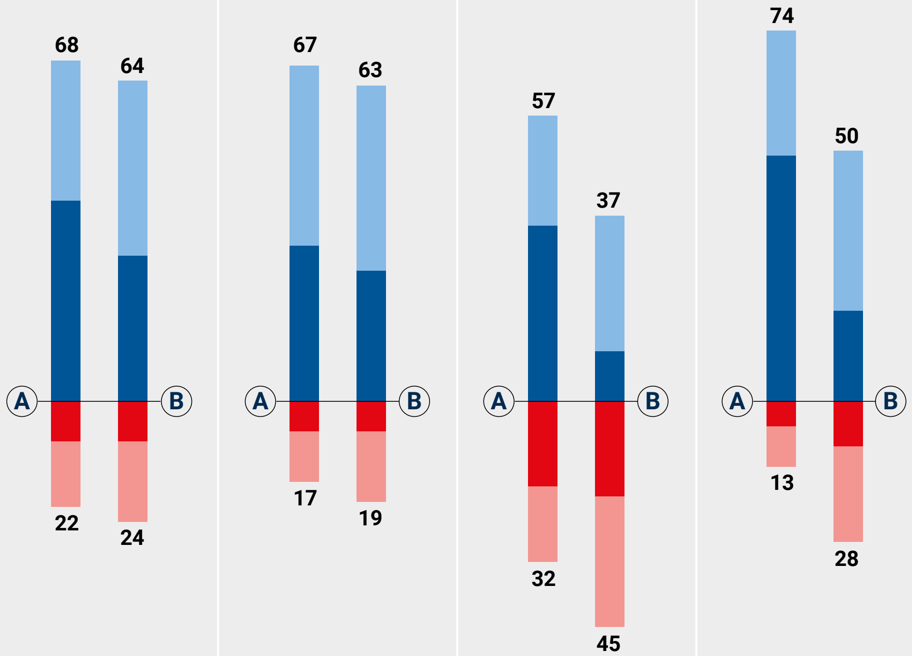
The prosperity of my country is in many respects linked to the well-being and positive development of other countries.

All figures in %



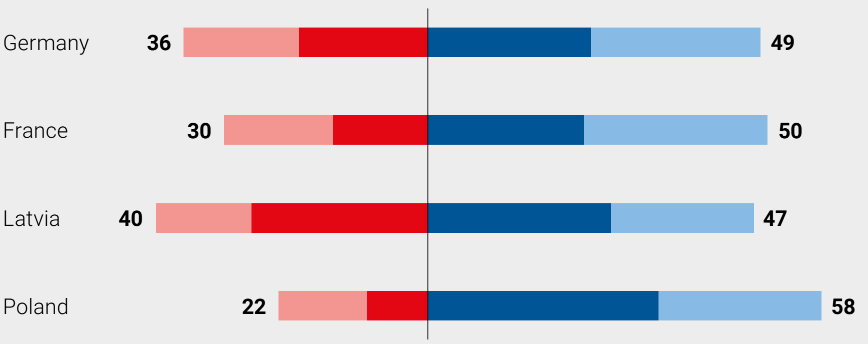
Ⓐ **My country should reduce its dependency on _Russia_ even if this has a negative impact on the living standards.**

Ⓑ **My country should reduce its dependency on _China_ even if this has a negative impact on the living standards.**



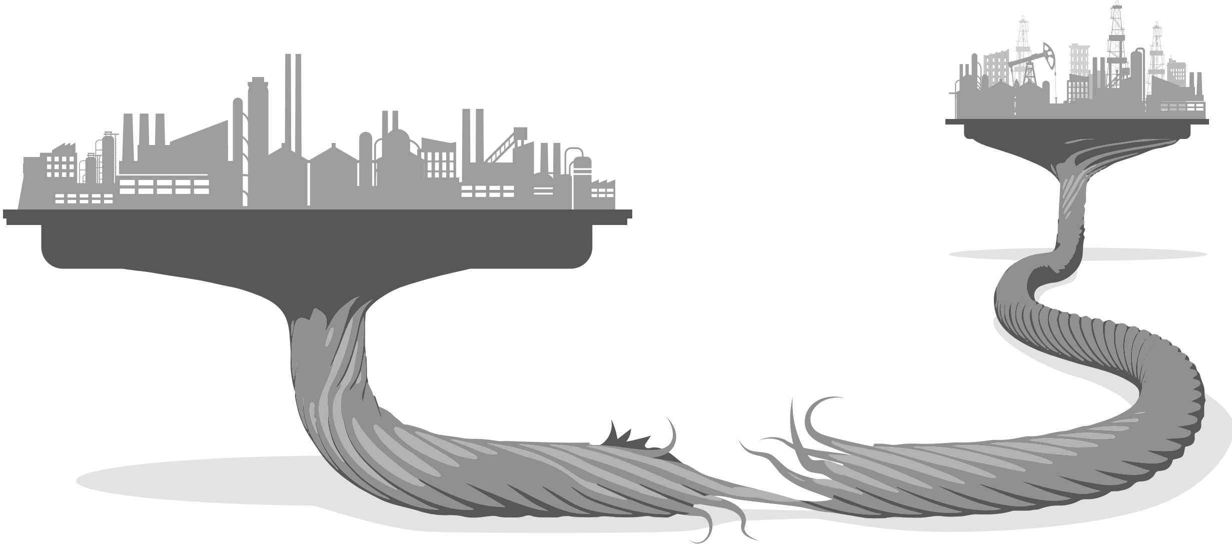
My country should ban imports of oil and gas from Russia even if this leads to further price increases.

All figures in %



■ Strongly agree ■ Somewhat agree ■ Somewhat disagree ■ Strongly disagree ■ Don't know / no response

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



Economic decoupling

A rejection of cooperation with Russia and scepticism towards cooperation with China are clearly noticeable in responses to questions on economic decoupling. Overwhelming majorities (around 70%) are prepared to reduce dependency on Russia, even at the cost of sacrifices in terms of living standards. The readiness to decouple from Russia is highest in Poland (74%), while Latvian respondents are more cautious (57%). This may be due to economic and cultural links between the two countries or the sentiments of the Russian-speaking part of the population.

Similarly, albeit at a lower level, relative majorities endorse import bans on Russian oil and gas, even at the expense of further price increases. Again, Polish respondents are most prepared for this (58%), while French, German and Latvian respondents are less sure (endorsement levels hovering around 50%). When comparing these numbers to the previous question, it seems that the more specific formulation of possible price increases leads to a more cautious response.

On decoupling from China, a familiar picture emerges, divided along East–West lines. Overwhelming majorities in Germany and France endorse a reduction of dependency on China, even if it had a negative impact on living standards in their countries. German and French preparedness to decouple from China is very similar to their resolve to decouple from Russia. In Eastern Europe, by contrast, decoupling from China is viewed as less of a priority. In Poland, 'only' 50% want to reduce dependency on China, and in Latvia respondents even reject this idea, with only 37% in favour. These figures corroborate the findings from the question on interests: fewer East Europeans view EU and Chinese interests as contradictory, and thus fewer call for economic decoupling.

Overall, perceptions of Russia in the four polled countries largely coincide and thus provide a foundation for a common approach. A complicating factor is the 'price tag' of economic decoupling. Figures show that people are prepared to reduce dependency on Russia when the question is posed generally, but the endorsement decreases significantly when concrete policies are named – for instance, halting the import of energy resources – and price increases are cited. By contrast, differences in perceptions of China might complicate the formulation of a common European China policy. This may be exacerbated by the fact that Europe is much more dependent for its economic well-being on trade with China than with Russia. If European governments decide to reduce economic ties with China, the high price may put a strain on Europe's societies and compromise their readiness to shoulder the burden.

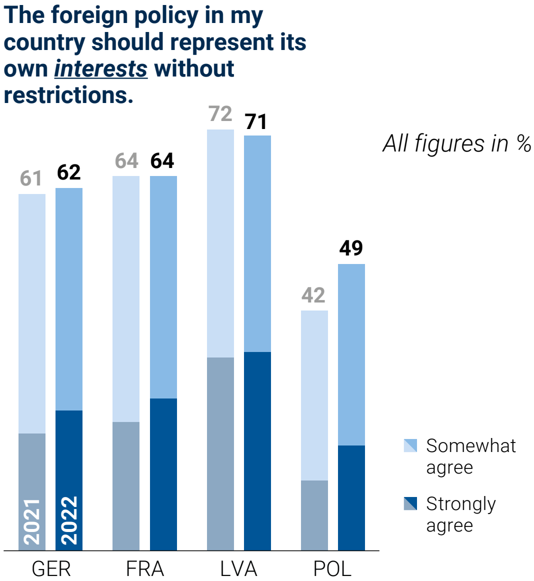
70%

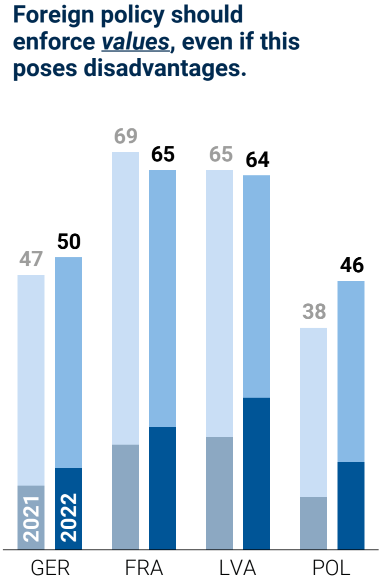
across the sample are prepared to reduce dependency on Russia, even at the cost of sacrifices in terms of living standards

Principles of foreign policy

Both values and interests are equally important components of foreign policy, according to respondents in polled countries. Support levels vary across countries, but in each case are similar for both values and interests, with interests being slightly more important. A remarkable exception is Germany, where interests (62%) clearly prevail over values (50%). There were hardly any notable changes in the figures since the last poll in autumn 2021.

A foreign policy that represents a country's own interests without restrictions is most supported in Latvia (71%) and least in Poland (49%). The strongest proponents of a foreign policy that enforces values, even if this gives rise to disadvantages, are again Latvia (64%) and France (65%). Poland is a surprising outlier because almost a third of respondents reject both the interest- and the value-based foreign policy. The Polish 'don't know' share is higher than elsewhere, at around 20%.



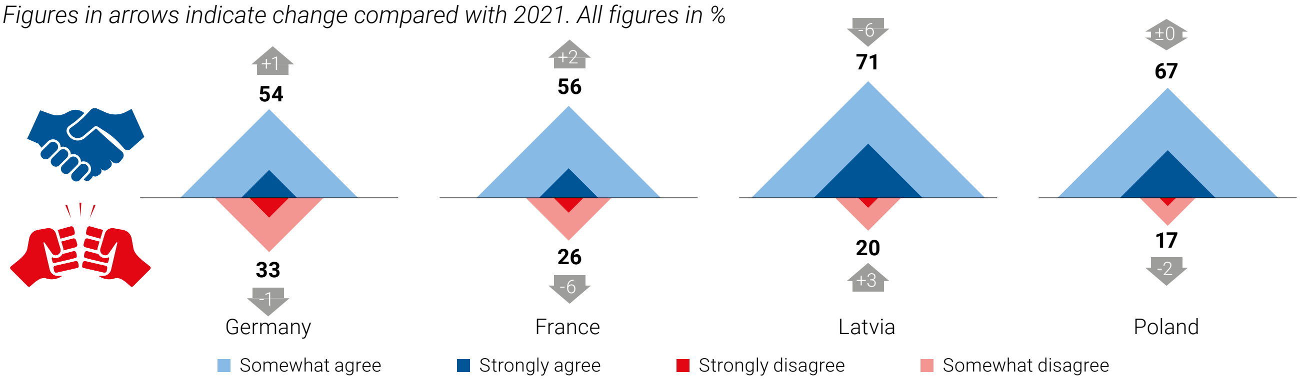


Deviations from 100% result from: "don't know" and "no answer"

A different picture emerges with regard to a pragmatic foreign policy, or cooperation with non-like-minded states for the sake of promoting peace and security. Just like one year previously, East European respondents are much more amenable to pragmatism (about 70%) than West European respondents (around 55%). Remarkably, rejection of a pragmatic foreign policy is strongest in Germany, with 33%. This is notable in the context of the clear tilt of German respondents towards interest-based foreign policy. Compared with 2021, the endorsement of a pragmatic foreign policy slightly increased in France and somewhat decreased in Latvia.

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

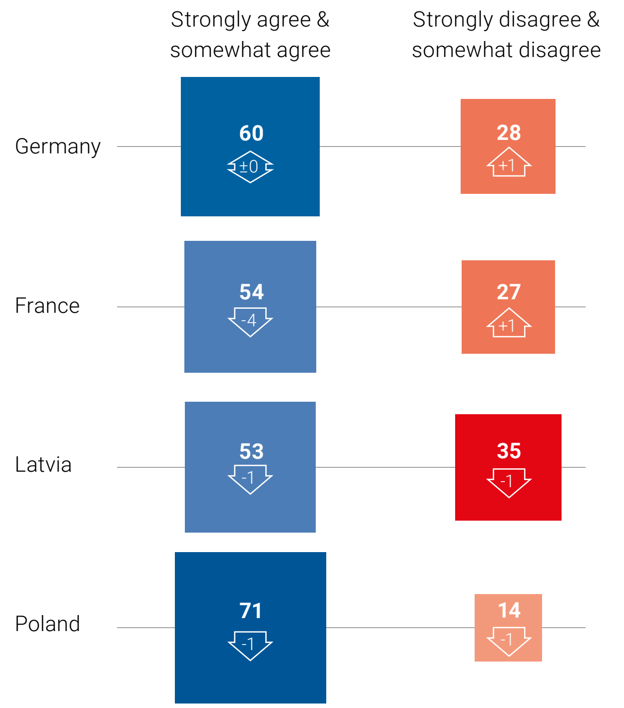
Figures in arrows indicate change compared with 2021. All figures in %



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

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

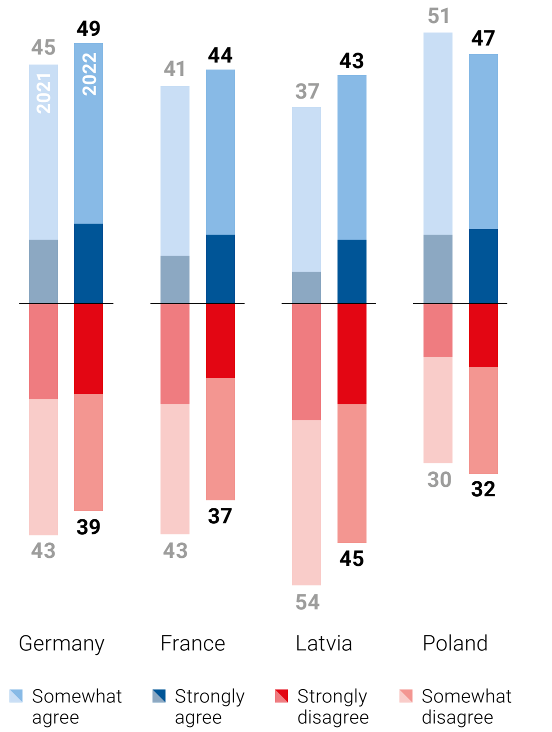
Figures in arrows indicate change compared with 2021.
All figures in %



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

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

All figures in %

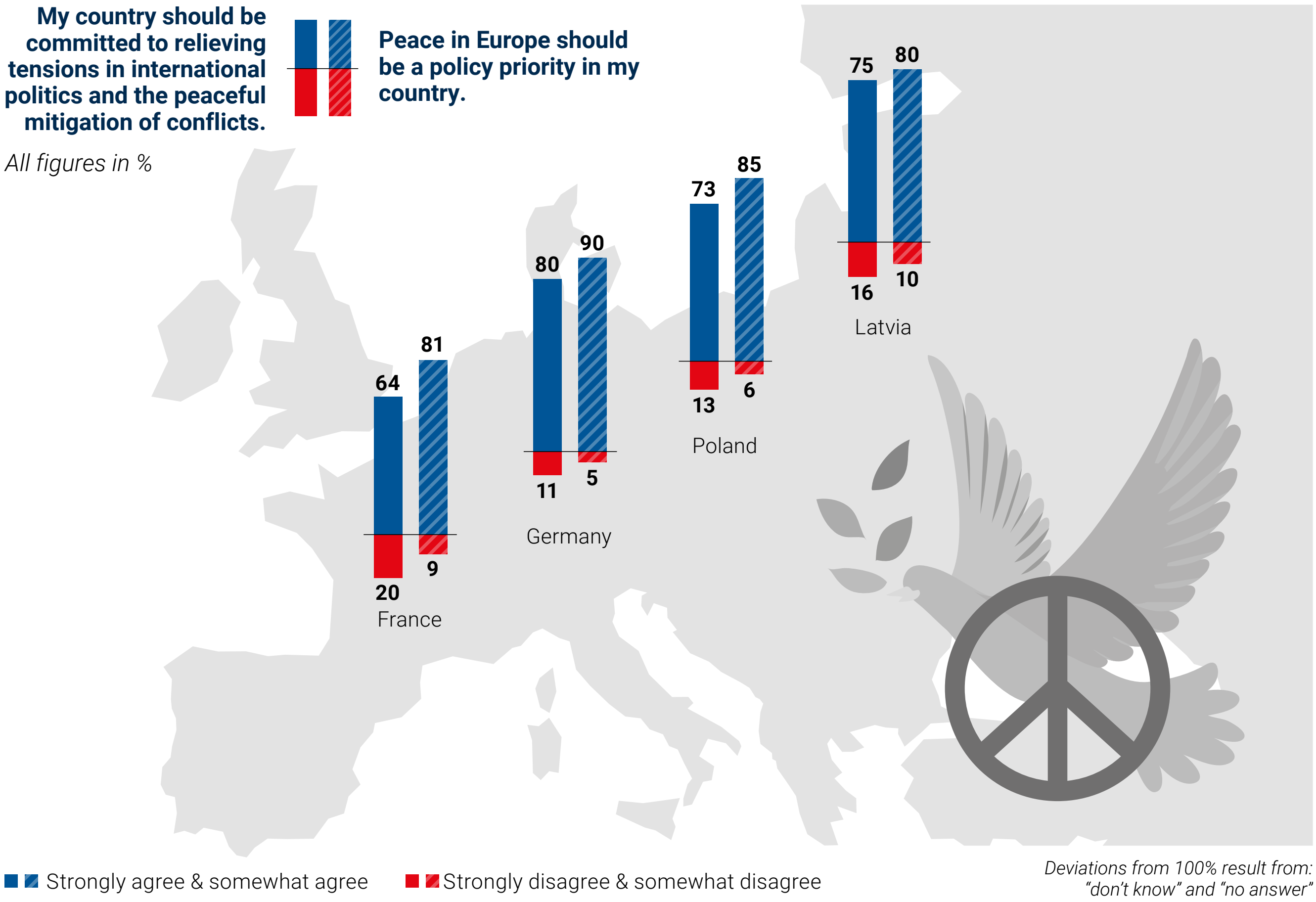


Deviations from 100% result from: "don't know" and "no answer"

Public opinion is split on the question of taking international responsibility and helping other states even if there are no direct benefits. In no country are there absolute majorities in favour of shouldering more international responsibility, even though the figures increased in all countries (bar Poland) compared with 2021. Comparatively high German and Polish shares of support (just below 50%) go along with significant shares of rejection (39% and 32%, respectively). A similar picture emerges for France: some 44% support taking more international responsibility, while 37% reject it. In Latvia, opinion is almost evenly split, with a slight majority rejecting taking more responsibility (45%). This hints at a general reluctance to take on a leadership role in international affairs, which can also be observed in relation to the more specific questions in the context of the European Union (see p. 41).

An active foreign policy is supported by absolute majorities in all countries, at a similar level to 2021. However, a regional pattern emerges. Respondents in Germany (60%) and Poland (71%) overwhelmingly want their countries to pursue an active foreign policy and play a significant role in resolving international crises and conflicts. French and Latvian respondents are less sure (about 54%). In Latvia, a surprisingly high share of 35% even reject an active foreign policy for their country, although the figure of 27% in France and 28% in Germany is also alarming.

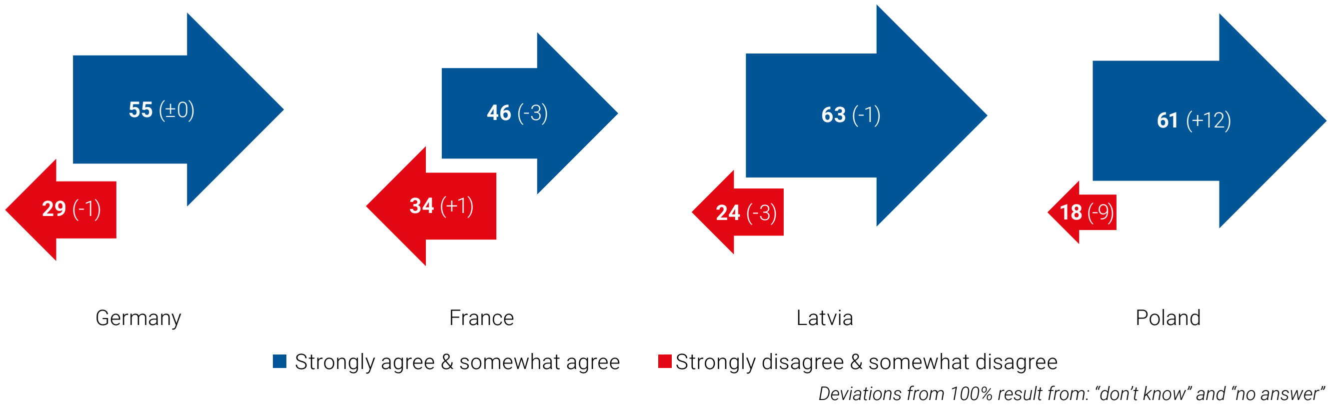
60%
in Germany and
71%
in Poland want their counries to play a significant role in solving international crisis and conflicts



Peace and diplomacy are overwhelmingly supported in all four polled countries. Over 80% think that peace in Europe should be a priority for their country's policy, a rise between 2021 and 2022, and in Germany the figure is even 90%. Similarly, large shares believe that their country should be committed to peaceful mitigation of conflicts and help relieve tensions in international politics. But remarkably, while 80% of German respondents agree with the statement, only 64% do so in France. Polish and Latvian support lies in between, at about 75%. Both French and Latvian support for peaceful mitigation of conflicts decreased since the last poll in 2021 by about 7%.

My country should take a clear stand in favour of one side or the other in the case of political conflicts abroad.

Figures in arrows indicate change compared with 2021. All figures in %



A question on taking sides in conflicts produces a mixed picture. Large absolute majorities in Poland (61%) and Latvia (63%) think that one should take a clear stand in favour of one side in the case of a political conflict abroad. German respondents' support for taking sides is lower, at 55%, and in France it is only 46%. The most remarkable change since 2021 occurred in Poland, most likely linked to the war in Ukraine: support for taking sides in case of conflicts abroad jumped from 49% to 61%.

War in Ukraine

The end of Russia's war against Ukraine is clearly a prerequisite for restoring European security. Ten months into the war, we asked respondents to assess the situation and its possible repercussions. Respondents characterise the war primarily as a bilateral conflict, with Russia clearly carrying the blame. Furthermore, they do not believe that the war is going to end soon, do not see easy solutions between peace and justice and consider their own countries as weakened by the war.

Assessment of the war

Public awareness of Russia's war against Ukraine and perceptions of its significance have increased since the last poll in 2021. As already noted, vast majorities in all four countries, especially Latvia and Poland, see the end of Russia's war against Ukraine (2021: resolution of the conflict in Ukraine) as a prerequisite of improving security in Europe. Remarkably, perception increased dramatically in all countries, albeit from different levels: in France and Latvia by 19%, in Germany by 17% and in Poland by 13%. The share of strong opinions is markedly high in all polled countries, often outweighing 'somewhat agree' by far. However, a gap in perception of about 10% between the 'East' and the 'West' still persists, as it did one year ago.

Correspondingly, in all four countries respondents reject the notion that the war in Ukraine is a war between Ukraine and Russia in which no third country should intervene. Large absolute (Latvia, Poland) or relative majorities (France, Germany) disagree. Notably, the rejection of 'non-intervention', or 'staying aside', increased by more than ten percentage points in all countries (bar Latvia, where it was at the highest level of all countries, 56%, already back in 2021). But there is again a gap of about 10% along the East–West divide, with more respondents in the two Eastern countries rejecting 'non-intervention' (54%-58%) than in the two Western nations (48%).

A remarkable observation is that respondents seem to have formed a clearer opinion on questions concerning Ukraine between the two waves of the poll. The share of 'don't know' responses fell significantly for all countries between 2021 and 2022. In many cases, it more than halved.

Regarding the character of the war, respondents were given three options, in random order:

a) it is a war between Russia and Ukraine, aimed at expanding Russia's territory;
b) it is a war between democracies and autocracies aimed at defending the liberal system of values;
c) it is a proxy war on Ukrainian soil, in which Russia and the West vie for global influence.

Across countries, solid relative or absolute majorities opted for the first choice, thus a war between Russia and Ukraine aimed at expanding Russia's territory. In combination with rejection of the notion of a war between Ukraine and Russia in which no third country should intervene, this allows for an interesting interpretation. These responses could underline the fact that Europeans are less complacent and more invested regarding this war than a year ago, but at the same time understand the limits of their engagement and do not want to get involved directly (for example, they support sending weapons but reject sending troops, see p. 23). They could also have in mind that international law allows for support for a victim of aggression and thus regard it as a bilateral conflict, but one in which countries should intervene with limited means. Only in Latvia does a notable though small share (33%) view the war as a proxy war on Ukrainian soil. Even fewer respondents view the war as a fight between democracies and autocracies – this option garners most support in Germany, at a mere 19%.

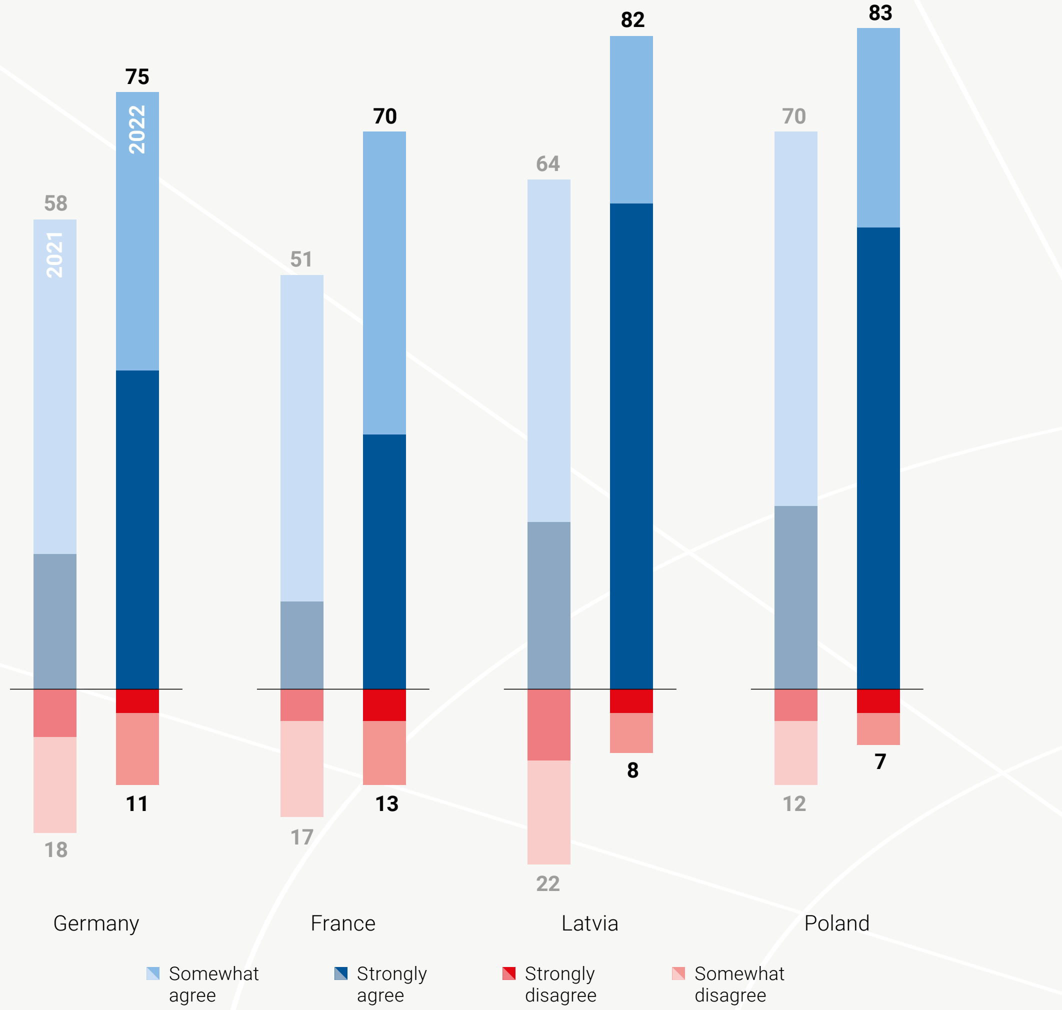
When asked whom the respondents regard as responsible for the escalation of the war, there is a clearly discernible trend towards nominating Russia. Russia is identified as the main culprit in all four polled countries, most strongly in Poland (82%). A much smaller portion of responsibility is attributed to Russian-backed separatists (around 21% on average). Ukraine is held accountable for the escalation of the war by only 15%, on average, although shares differ starkly between Germany (22%) and Poland (8%). The EU is blamed least, but the USA is viewed as an escalation factor by considerable minorities in all countries, for example, by 9% even in Poland.

Compared with 2021, trends have been reinforced. Responsibility for the war in Ukraine is placed on Russia by 24% more in France, 22% more in Germany and 17% more in Poland. The perceived responsibility of separatists has decreased; in Latvia it has even halved. Attribution of some responsibility to Ukraine did not change in Germany and France, but went down in Poland and especially Latvia. The views on the marginal role of the EU did not change, while the perceived escalatory role of the United States increased in all countries, doubling (albeit from very low levels) in France and Germany.

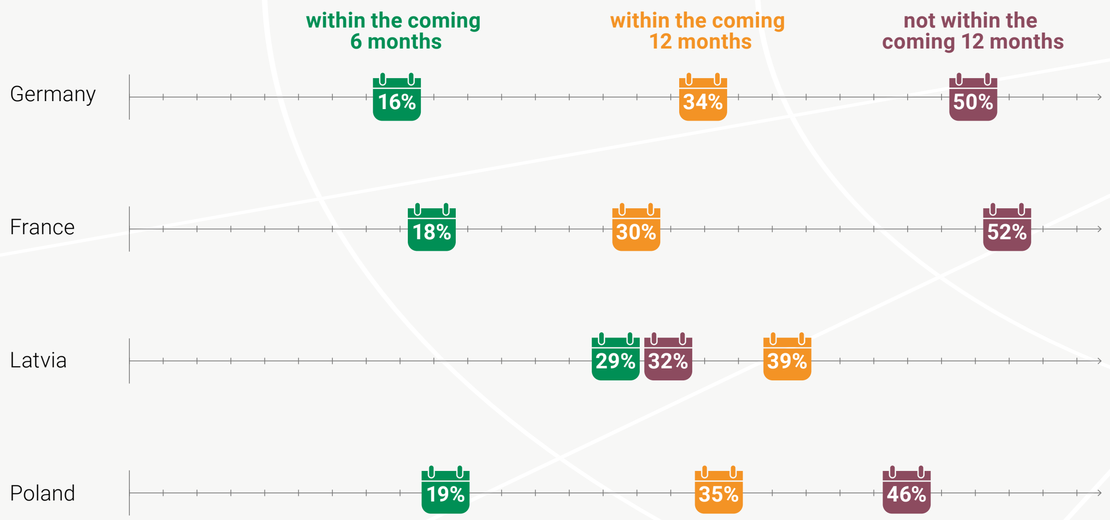
Security Radar 2023

The end of Russia's war against Ukraine is a prerequisite for improving security in Europe.

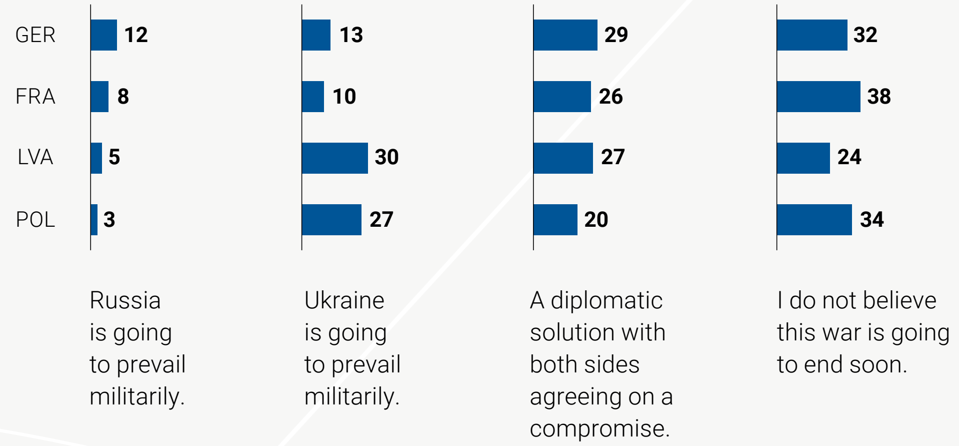
All figures in %



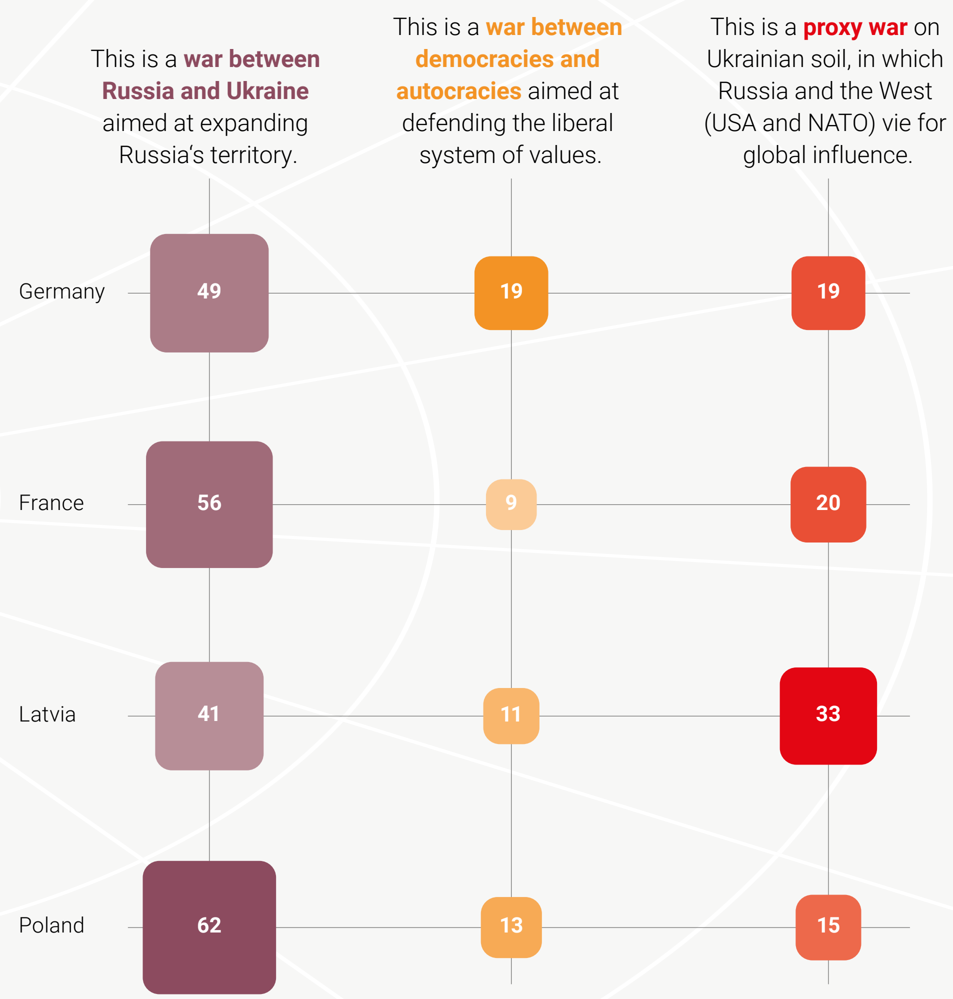
In your opinion, when will the war between Russia and Ukraine come to an end?



How do you believe this war is going to end?



How would you characterise Russia's war against Ukraine?



Combined responses "strongly agree" and "somewhat agree". Deviations from 100% result from: "don't know" and "no answer". All figures in %

Repercussions of the war

Looking ahead, the responses reveal a rather sombre picture. Asked about their expectations concerning the duration of the war, the probable manner of its end, its repercussions for geopolitical actors, and the nature of the war in international relations more broadly, respondents in all four polled countries show an understanding of the complexity.

Regarding the duration of the war, most respondents are pessimistic (or perhaps realistic), believing that it is not going to end within the coming twelve months. Only Latvian respondents are more optimistic, with 29% and 39% thinking the war will end within the next six or 12 months, respectively.

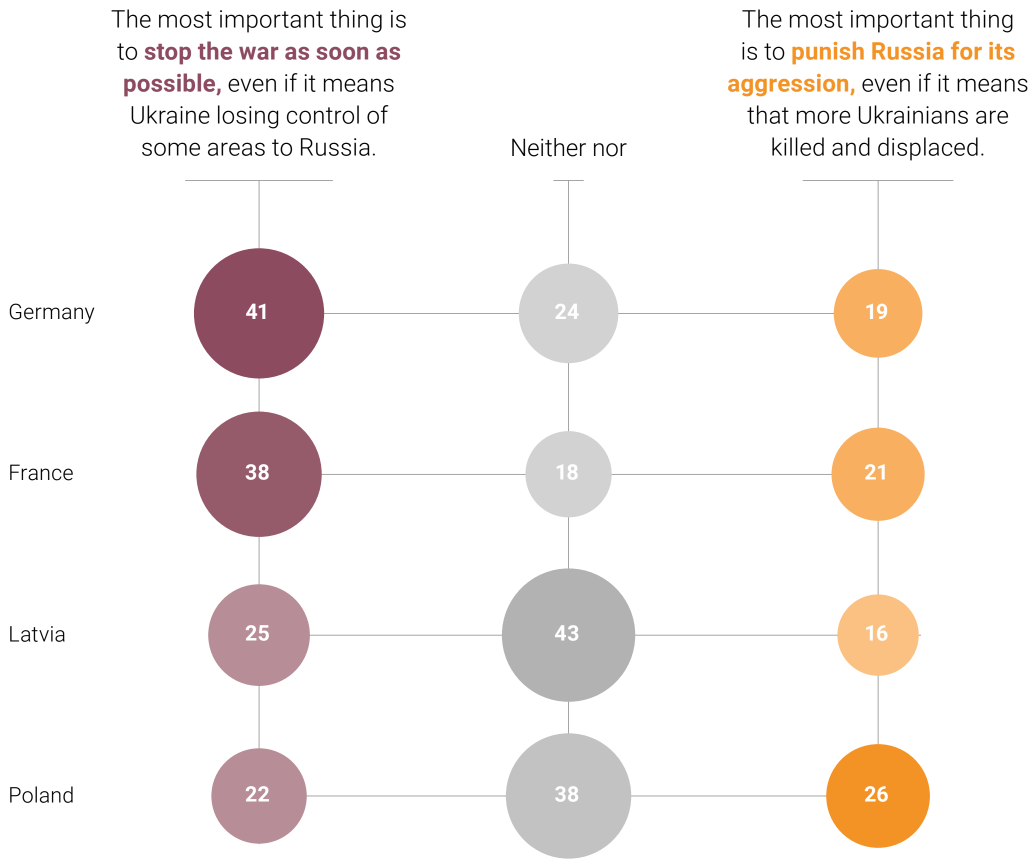
When asked how the war is going to end, most respondents think that the war is not going to end soon. For all countries bar Latvia this is the option considered most likely (between 32% and 38%). The second-most chosen option in Germany and France is a diplomatic solution with both sides agreeing on a compromise (29% and 26%, respectively). Latvian and, to a lesser extent, Polish respondents also believe in a diplomatic solution (27% and 20%, respectively), but place more hope in military victory by Ukraine (30% and 27%, respectively). Only very small minorities in all countries believe Russia is going to prevail militarily. In summary, only in Latvia is a Ukrainian victory chosen as the most likely outcome of the war. Respondents in all other countries do not think the war is going to end soon at all.

The most pertinent question is how to end the war. Respondents were offered two options with different trade-offs, that correspond with the so-called Peace Camp and the Justice Camp, as well as a neutral third option.

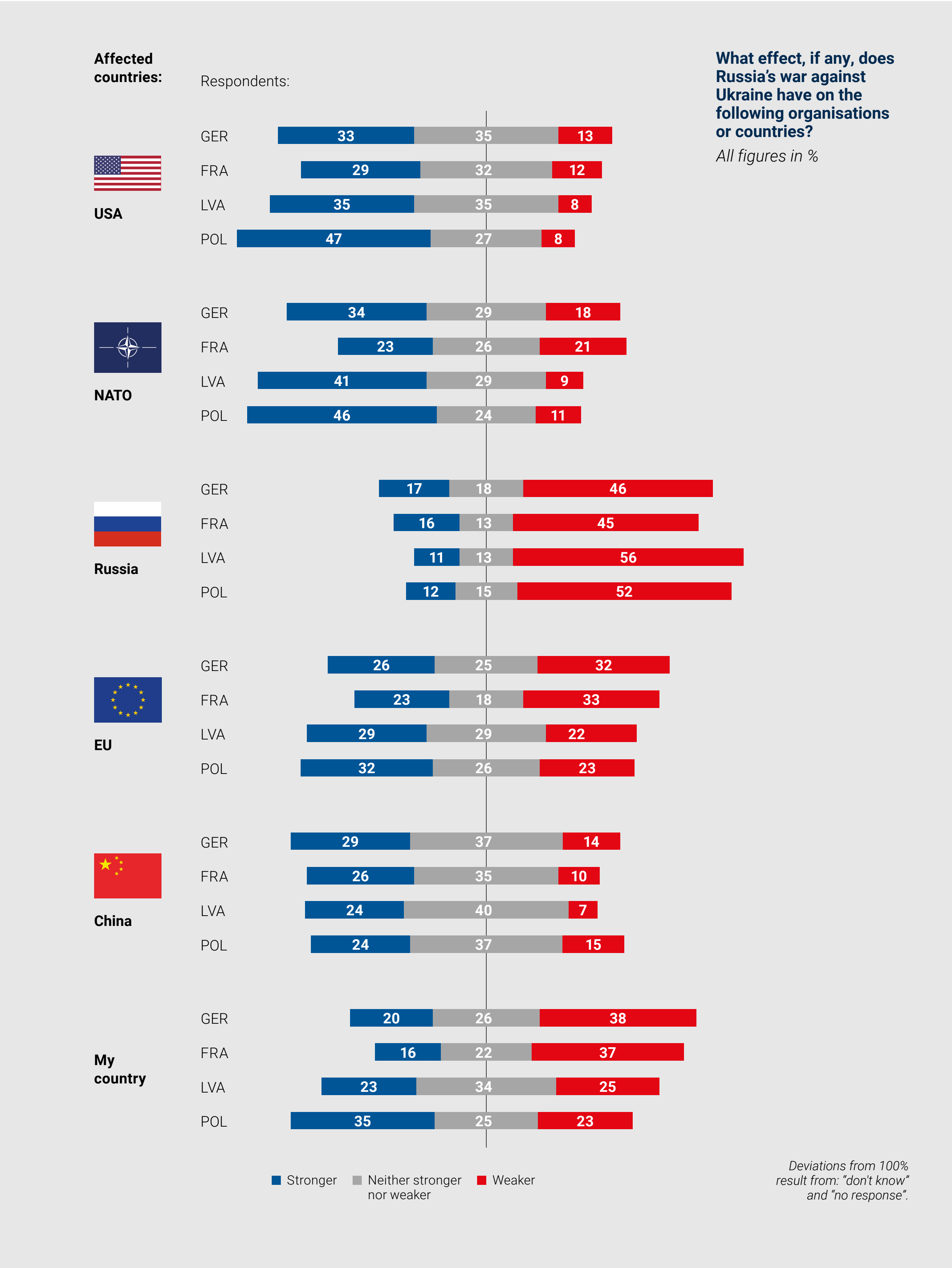
Proponents of the Peace Camp are clearly found in Germany and France. Some 41% and 38%, respectively, think that it is necessary to stop the war as soon as possible even at the cost of territorial losses. Respondents in Latvia and Poland, firmly placed in the Justice Camp in a May 2022 poll by the European Council on Foreign Relations, surprisingly choose the third option, 'neither nor', with 43% and 38%, respectively. Still, 26% in Poland choose Justice, thinking that it is proper to punish Russia for its aggression, even at the cost of further lost lives and destruction. The figures in Germany and France are close to 20%. In summary, proponents of ending the war as soon as possible are prominent in Germany and France, while people in Latvia and Poland do not see an easy solution.

Which of the following statements comes closest to your view?

All figures in %



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



When asked about losers and winners of the war so far, a clear picture emerges: NATO, the USA and China are viewed as being stronger as a result of the war. Russia is viewed as a clear loser. The EU is somewhere in between. The respective countries are also viewed as weakened, with the exception of Poland. Generally, Polish respondents seem to display a defiant attitude, viewing not only their own country as clearly strengthened, but also most clearly perceiving the United States and NATO as winners of the war.

The way forward

Mutual trust between France, Germany, Latvia and Poland is fairly low. Self-perceptions and perceptions of others in terms of each country's role in European security policy – whether as leader, follower or obstructor – sometimes differ starkly. This may create serious obstacles to the EU's strategic autonomy and a European army and poses the question of trusted and desirable leadership within the EU.

Focussing on the repercussions of the 'Zeitenwende' for the prospects of further developing the European Union as a credible actor in foreign and security policy, a mixed picture is observable in the survey, albeit with a silver lining.

Two questions frame the more general attitude towards the EU in the four countries. When asked whether their country should cooperate more with the European Union (see also p. 26), a majority of respondents showed fairly stable support, with nuances between cases. In Germany, 63% support stronger cooperation with the EU (up from 62% in 2021), whereas in Latvia this number has remained stable at 74%. In Poland there is a similar level of support at 71%, which shows a slight decrease from 75% in 2021. Only in France is the level of support discernibly lower at 52%, down from 59% in 2021.

The other question framing broader attitudes towards the EU asks whether the politics of the European Union is regularly in conflict with the interests of the respective countries. Here we observe a general increase in all countries on different levels. Whereas France and Poland show a rather high level of perceived conflict with the EU, at 46% and 47%, respectively, Germany and Latvia are a bit lower, each at 41% (see also p. 10).

General attitudes towards the EU have thus changed only slightly. In France and Poland the perception of conflicting interests with the EU has grown in the past year and in France we also observe a discernible decrease in the support for cooperation with Brussels.

Strategic autonomy

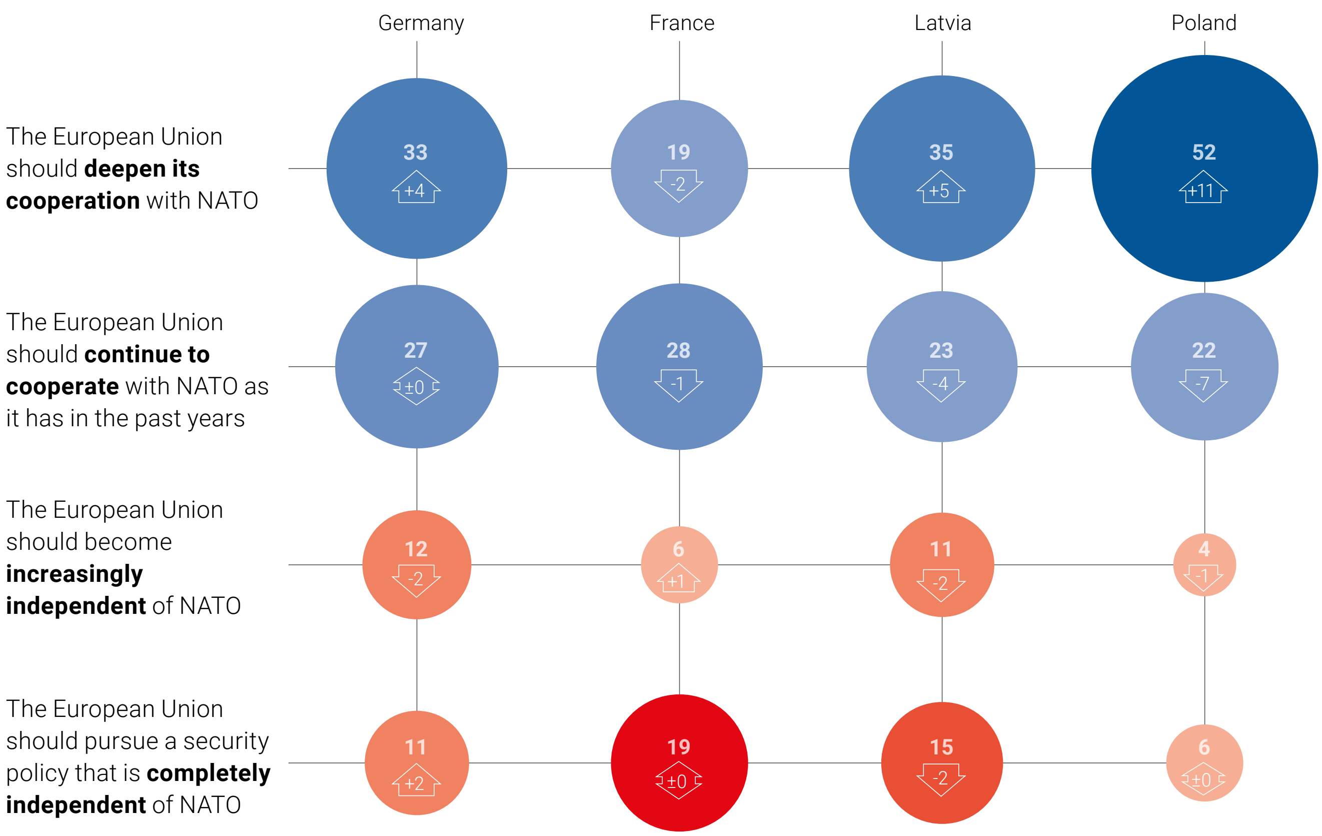
Only in France there is a stable support from
19%
of respondents for the EU pursuing a security policy completely independent from NATO

When looking more closely at specific questions around European strategic autonomy – meaning the EU's ability to pursue its own security policy – this picture becomes differentiated. We posed two sets of questions to the respondents to assess this attitude, one focusing on relations between the EU and NATO and the other on the prospects of a European army. Concerning the relations between the EU and NATO, there is clear support for either deepening relations or maintaining them at the current level. Only a small fraction of the respondents supports an EU increasingly independent from NATO or an EU security policy completely independent from the North Atlantic Alliance.

Only in France is there stable support for the EU pursuing a security policy completely independent from NATO, at 19% of respondents. In Latvia this number stands at 15%, in Germany just 11% support complete independence from NATO and in Poland just 6% agree. These numbers have changed only slightly from 2021 in all countries, if at all. The relatively moderate option of the EU becoming increasingly independent from NATO is regarded even less favourably. Support for it is highest in Germany (12%) and Latvia (11%), whereas in France (6%) and Poland (4%) there is even smaller support. The changes from 2021 are marginal.

More movement in regard to relations between NATO and the EU can be observed when we look at the options of maintaining cooperation at the current level or deepening it. Both options are supported by large proportions of respondents. Whereas the option of preserving the current level of cooperation is supported by a rather stable 27% in Germany (same as in 2021) and 28% in France (29% in 2021), in Latvia (23%, down from 27% in 2021) and Poland (22%, down from 29% in 2021), this option has lost some ground. In both countries that becomes clear when the question of deepening cooperation comes into play. This is supported by an impressive 52% of respondents in Poland (41% in 2021) and 35% in Latvia (30% in 2021). In Germany 33% of respondents perceive a need to deepen cooperation (29% in 2021), while only France shows a significantly different picture, with just 19% supporting a deepening of relations (21% in 2021).

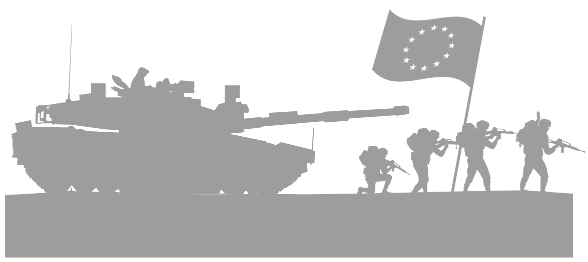
Here are 4 statements on future relations between the EU and NATO. Please choose one that you agree with most.
Figures in arrows indicate change compared with 2021. All figures in %



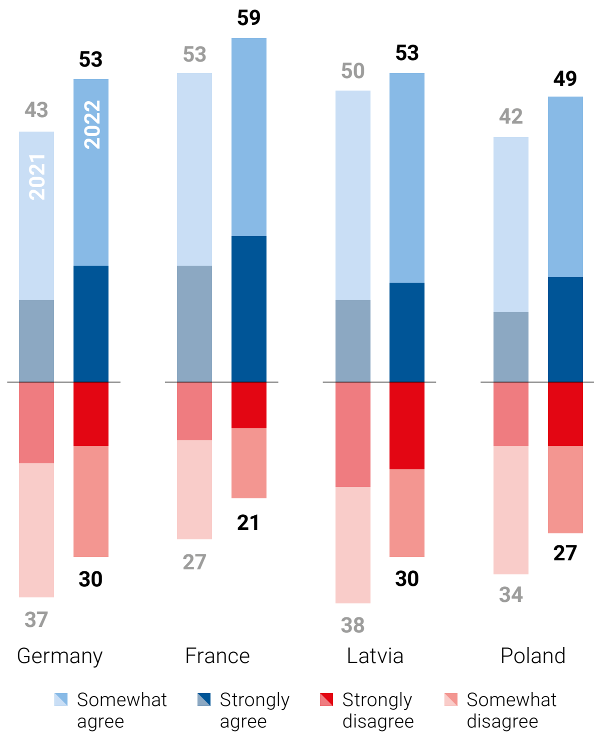
Combined responses "strongly agree" and "somewhat agree". Deviations from 100% result from: "don't know" and "no answer".

European army

The establishment of a European army would be a clear expression of a European Union able to act in the realm of international security. There is a consistent trend of rising support for this issue in all four countries. Interestingly, in three of the four countries, an absolute majority agrees that the EU must build up its own powerful European army in order to be on an equal footing with other great powers. Only in Poland does support fall short of an absolute majority, at 49%, although that is an increase on the 42% registered in 2021. In Germany we find the biggest change in support for a European army at 53%, up from 43% in 2021, whereas in Latvia the 53% support represents only a modest increase on the 50% found in 2021. Support for this measure is highest in France, in line with the responses on EU–NATO relations, at 59%, a rise on the 53% recorded in 2021.

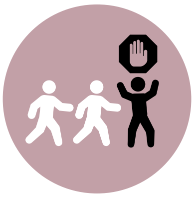


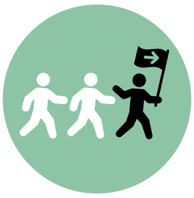
In order to be on an equal footing with other great powers, the European Union must build up its own powerful European army.
All figures in %



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

Mutual perceptions: Followers, leaders and obstructors





In the complex governance system of the European Union, specifically in security policy, the role of the Member States is key to facilitating progress. This is especially the case for the three states forming the so-called 'Weimar Triangle', Germany, France and Poland. Because they are regarded as the key drivers of the European Union, we looked more closely at how their roles are perceived in the four countries. The perception of how these states act in this context is a significant indicator of how coherent their policies are considered to be by important partners.

To this end, we offered the respondents three options to assess the roles of the three states: first, blocking common EU security policy; second, merely going along with the decisions of other member states; and third, taking an active role in building a common EU security policy. These options correspond broadly with roles that could be described as *obstructor, follower* and *leader*.

Interestingly, France is the only country whose self-perception and the perception of others correspond.

Interestingly, France is the only country whose self-perception and the perception of others correspond. The country regards itself as a leader in EU security policy, with 33% of French respondents supporting this option, while a still substantial 31% regard the country rather as a follower, and a mere 5% see themselves as obstructors. The other three countries share this view, sometimes to a higher degree than the French themselves: 40% in Germany and 36% in Latvia regard Paris as a leader in EU security policy and even 27% in Poland do so. Only 20% in Germany, 17% in Poland and 15% in Latvia believe that France is a follower in these matters. Concerning the question of obstructing a common EU security policy, there is an interesting deviation from the otherwise coherent image. In Germany, this is supported by a mere 7% and in Latvia by 11%, whereas in Poland a considerable proportion of respondents (20%) believe France to be an obstructor, more than those who see it as a follower. But overall, the main role that France is associated with is leader in EU security policy.

Regarding Poland, we can observe a clear East–West divide in its perception. A slight majority of 32% of Polish respondents regard themselves as leaders in EU security policy, a view that is shared by an impressive 45% in Latvia. Similarly, 25% in Poland and 13% in Latvia regard Warsaw as a follower in EU security policy, and just 13% in Poland and 7% in Latvia believe the country to be an obstructor. Perceptions in Germany and France, on the other hand, are considerably different. In both countries Poland is perceived as a follower in EU security policy by most respondents (28% in Germany and 22% in France). In Germany 19% of respondents even regard Poland as an obstructor in the EU, a view shared by 10% in France. Only 13% in Germany and 14% in France regard Warsaw as being a leader in EU security policy. Summarising, Poland is ascribed two roles in EU security policy: leader and follower.

Germany is viewed as a leader by France and Latvia, but as an obstructor by Poland, and as a follower by its own citizens.

With regard to Germany the picture gets even more complicated, starting with the fact that 38% of German respondents believe their country to be a follower in EU security policy. Just 28% see themselves as leader and 8% as obstructor. From outside, this is perceived rather differently. A majority of French (31%) and Latvian (38%) respondents perceive Germany as a leader, a view that is shared by a considerable 25% of Polish respondents. Just 21% in France, 15% in Poland, and 13% in Latvia regard Berlin as being a follower in EU security matters. When it comes to the role of obstructor, a slight majority in Poland regard Germany as such an actor in the EU (28%), a view shared by only 14% in Latvia and 10% in France. Germany thus is being ascribed three different roles in the EU: leader (by France and Latvia), follower (by itself), and obstructor (by Poland).

An interesting aspect of these questions is revealed when the 'don't know' responses are taken into account. It becomes clear that throughout all four countries more respondents have an opinion on Germany (with 'only' 29% 'don't know'). France seems to be a bit less in focus because a slightly higher number of respondents do not choose any of the three options (35%), and while in Poland this is even more nuanced with 'don't know' offered by an average of 42% of respondents.

Leadership and trust

Moving forward from countries' current roles in the EU to the key question of leadership, the picture becomes even more blurred and complicated. We approached this issue with three questions, all of them focussed on the Weimar Triangle comprising France, Germany and Poland. First, we asked whether respondents would trust these countries to take a leading role in EU security policy; second, we asked which country would be trusted to be a leader in common EU security policy; and third which country would be preferred for leadership. In the two latter questions, the respondents were not offered the choice of only one of the three countries in the Weimar Triangle, but also the collective option of 'all three together'.

On the broader question of which country or countries might play a leading role in the EU, we observe a mixed picture. As might be expected, respondents are comfortable with their own country having a leading role. This applies clearly to Germany and France, where 62% of respondents trust their own country with a leading role. Poland is an interesting outlier, as only 47% of Polish respondents put trust in their own country, which is slightly less than the trust Latvians put in a leading role for Poland, at 48%. When it comes to leading roles for other countries, some patterns emerged. Germany is trusted by a majority of French (52%) and Latvian (51%) respondents, but by just under a third of Polish respondents (32%). France enjoys considerable trust among German respondents (55%), but markedly less among Latvians (40%) and Poles (36%). Poland is the most divisive case. Just 24% of German and 26% of French respondents trust a Polish leading role, whereas the Latvian (48%) vote of confidence is much stronger.

A similar pattern emerges in relation to the questions of which country would be most trusted and preferred as leader. In all three countries the country most trusted and preferred to lead is the respondent's country itself. However, people clearly differentiate between a rather vague leading role and the country most trusted to be a leader, as the responses are generally on a lower level than in the previous question.

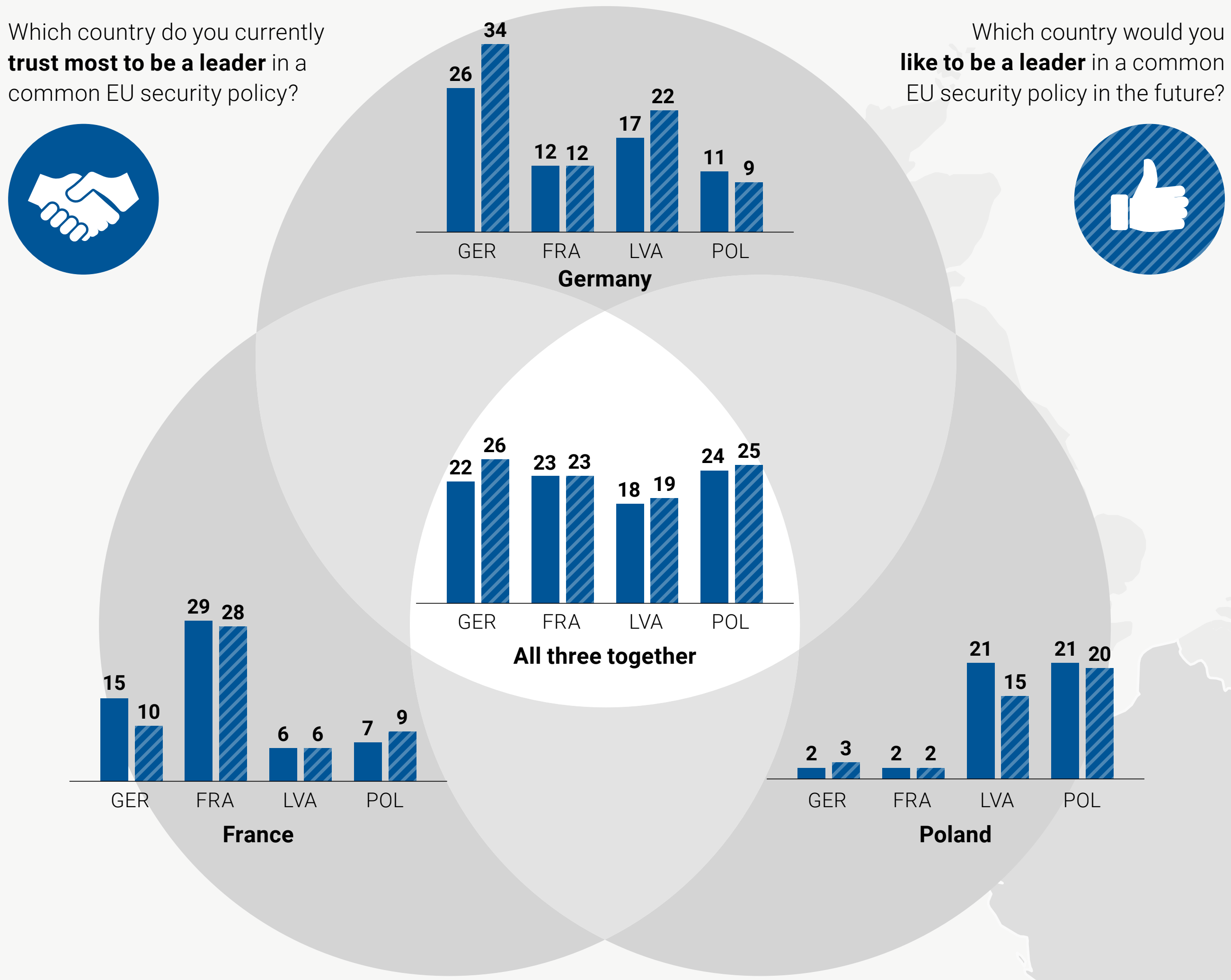
Three observations stand out. In France, trust and preference generally show a high consistency and are nearly at the same level on each issue. Correspondingly, trust in and a preference for French leadership are at a similar level, namely 29% and 28%, respectively, and both show a significant margin with the 23% supporting the next-best-option, which would be trust in and preference for collective leadership. Germany is trusted by only 12% of French respondents, and preference for German leadership is at the same level. Poland fares considerably worse, with just 2% of French respondents trusting the country to take on leadership.

In Poland, there is also a high consistency between trust and preference. However, what stands out is the fact that both trust in and preference for Polish leadership is only the second-best option for Polish respondents, supported by 21% and 20%, respectively. Instead, the option of collective leadership is trusted by more respondents (24%) and also preferred by a higher margin (25%). The perception of the two other countries shows a similar, but rather low level of trust in their leadership, with Germany at 11% and France at just 7%. Both countries are therefore preferred by only 9% of Polish respondents to assume leadership in EU security policy.

In Germany, there are some interesting differences. Again, German self-perception stands out: 26% of Germans trust their own leadership in EU security policy, but a considerably higher number – 34% – would prefer it. In comparison with that, the perception of France shows an inverse relation between trust and preference: 15% of Germans trust French leadership, but only 10% would prefer Paris to take on a leadership role. The collective option is trusted by 22% of Germans and preferred by 26%. The perception of Poland is rather distinct: only 2% of Germans trust Poland to be a leader and only 3% would prefer it to lead. In the German case, there is an interesting gap between the preference for leadership and the perception of the country's current role in EU security policy. Whereas Berlin is currently perceived by a majority of German respondents as being merely a follower in EU security policy, their preferred role for the future would be leader.

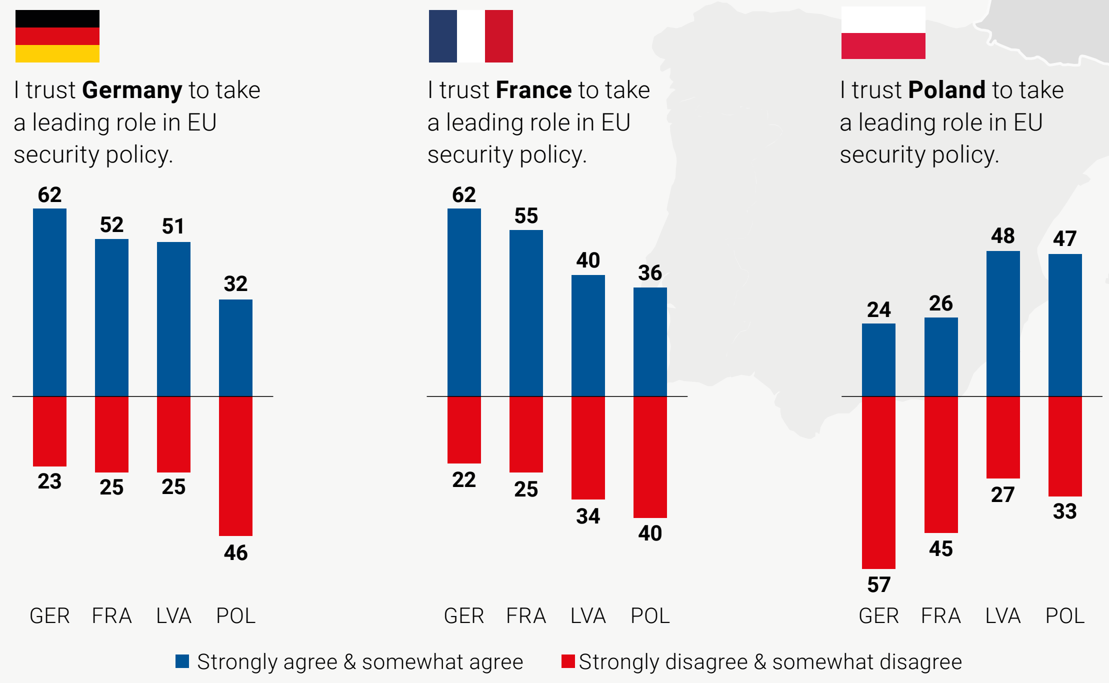
The only country outside the Weimar Triangle included in this poll is Latvia, and the country shows an interesting pattern on this question. Here, the level of support for the collective option is lower than in the countries of the Weimar Triangle itself, preferred by only 19%. France attracts only a small level of trust in its leadership and is preferred by the same small fraction of Latvian respondents (6%). Poland, however, is trusted by 21% in Latvia, but only 15% would prefer the country to take on leadership. Germany is perceived the other way around, as 17% of Latvians trust Germany to be a leader in EU security policy, but 22% would prefer the country to take on a leadership role.

Weimar triangle

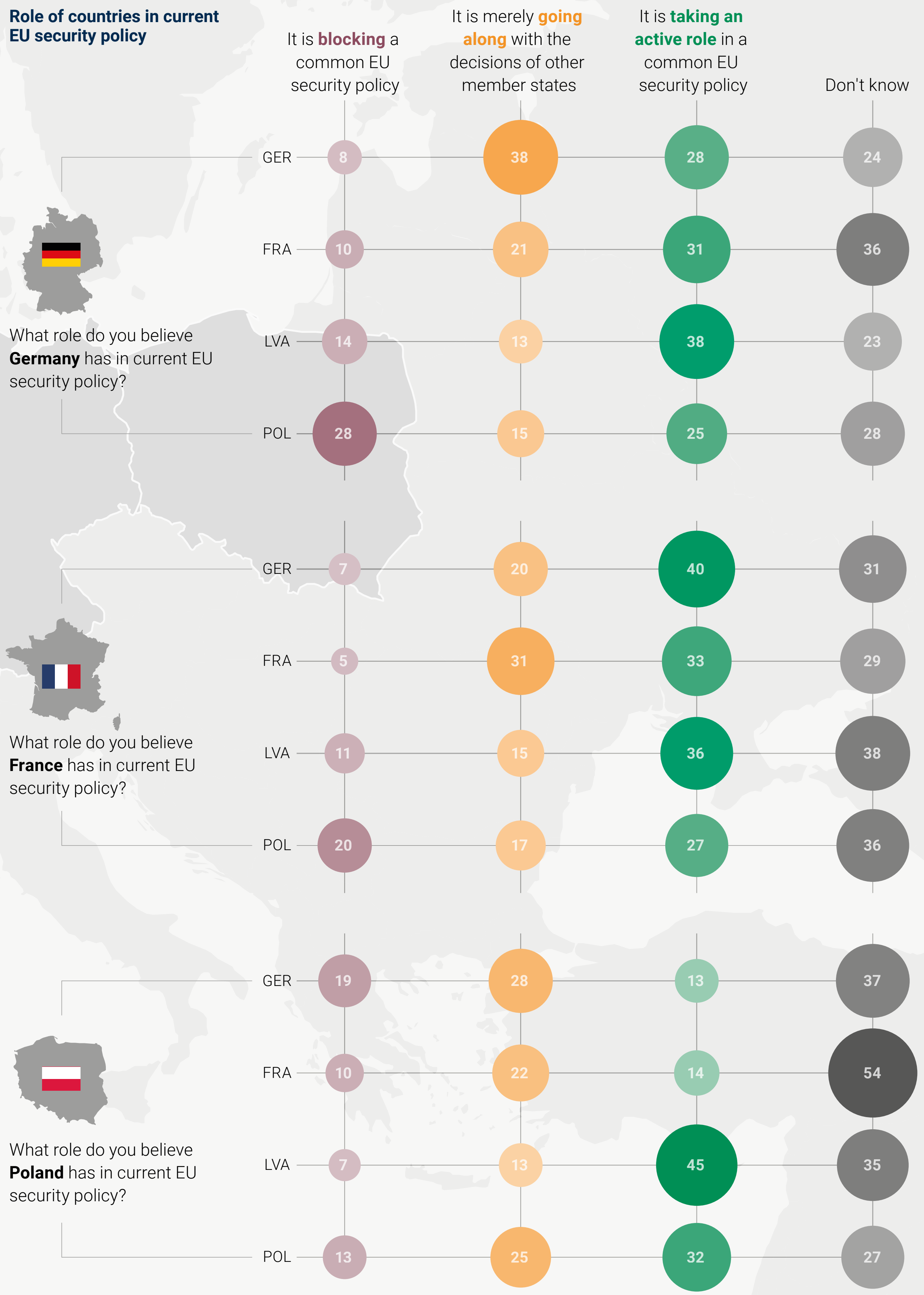


Combined responses "strongly agree" and "somewhat agree". All figures in %

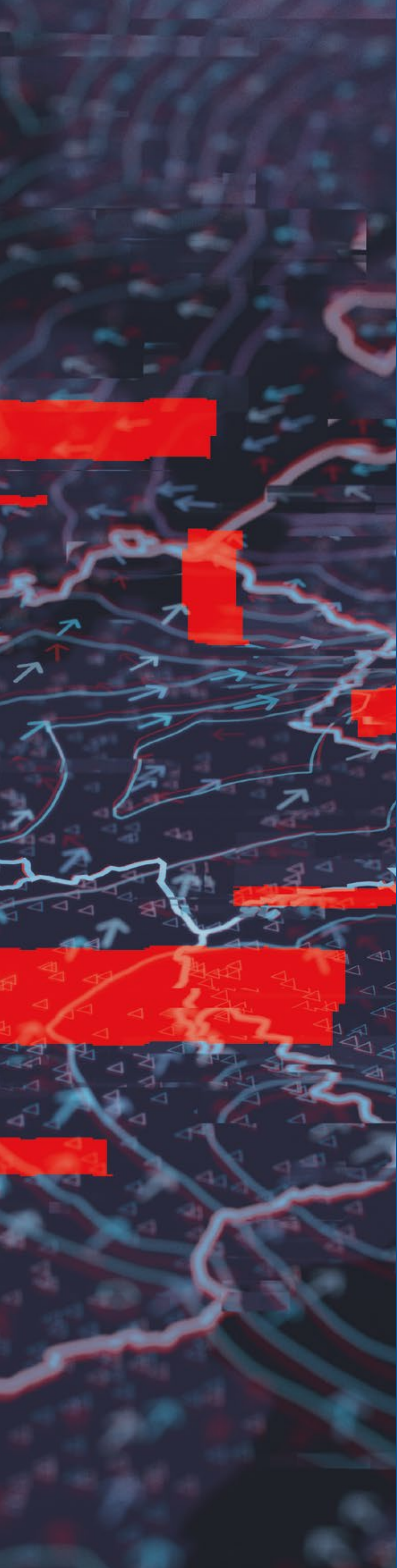
Leadership in EU security policy



Role of countries in current EU security policy



Deviations from 100% result from: "no answer". All figures in %



Country highlights

Germany

France

Poland

Latvia

Germany

[Rattled and responsible]

In the wake of Russia's invasion of Ukraine the German term *'Zeitenwende'* (watershed) has entered the international political and academic discourse. Our poll shows how deeply this watershed now pervades the security policy perceptions of Germans ten months into the war. We can clearly observe, for example, a change in German relations with Russia. The extent of German disillusionment with Russia has created attitudes in 2022 that resemble Polish perceptions in 2021. This is particularly evident in attitudes to sanctions; support for widening sanctions on Russia nearly doubled from 2021 to 2022, reaching 60%.

In Germany a change in the perception of geopolitical structures can also be identified. The perception of China was already rather negative in 2021, with a clear identification of conflicting interests between the EU and China, and scepticism towards further cooperation. Russia was seen more favourably in 2021, but this changed fundamentally in 2022. It seems that from a German point of view, a new antagonistic bloc is forming that comprises Russia and China.

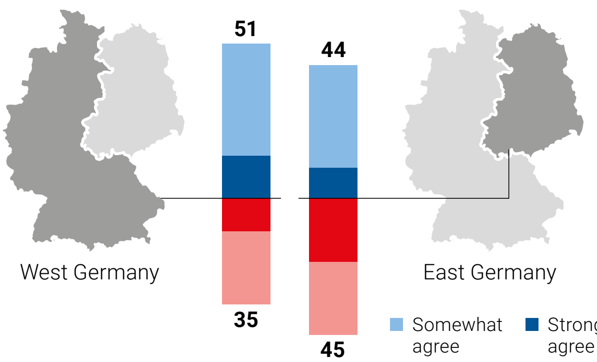
Germans' proverbial 'Angst' presents as something of a paradoxical phenomenon in our survey. Fears of conflict, wars in Europe and even a direct military clash between Russia and the West have increased very strongly. One might guess that war is back in Germans' minds. Economic anxiety has also increased. Fears of economic crisis and an expectation that one's own economic situation will deteriorate have risen significantly. That was to be expected. When asked about their fear of nuclear escalation, however, Germans show significantly lower concern than their counterparts in the other three countries. Whereas in France, Latvia and Poland 70–75% of respondents fear nuclear escalation, in Germany, the country that is phasing out nuclear energy and had one of the strongest peace movements against nuclear armament in the 1980s, is significantly less concerned. Some 55% of respondents there, still an absolute majority but 20% less than in France, are worried about nuclear escalation. That could be attributed to the ongoing public debates, in which Russia's nuclear posturing is consistently portrayed as a bluff, but that is currently just speculation. The phenomenon requires further research.

Generally, the *'Zeitenwende'* seems to have loosened previously firmly held beliefs on security policy, though without a clear direction of travel yet. That leads to a rather mixed picture, in which Germany is now close to its Eastern European partners on some issues, whereas the culture of restraint, specifically on military issues, is still very much alive. There is also somehow a negative perception of Germany's role in Europe, with a majority believing that their own country is merely a follower in European security matters. Combined with a clear preference for German leadership in Europe, the government now has a substantial to-do-list in order to close this gap.

One fairly surprising insight in the German data reveals that respondents from eastern Germany still shows a different attitude towards Russia and the United States than respondents from western Germany. On all questions referring to Russia we can observe less scepticism towards Russia, a lower threat perception and a higher preparedness to cooperate with the country more closely than is evident in western Germany. When It comes to the United States, however, the picture is reversed. Respondents in eastern Germany are less inclined to cooperate closely with the United States or even NATO than western Germans and they also regard the US role in the current war more suspiciously.

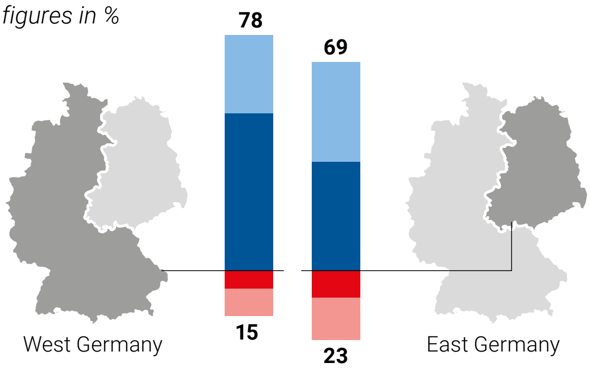
Germany should collaborate more with the USA than before.

All figures in %



Russia is a threat to peace and security in Europe.

All figures in %



Somewhat agree · Strongly agree · Strongly disagree · Somewhat disagree

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

France

[Puzzled and active]

The effects of the Russian war in France could also legitimately be described as constituting a *'Zeitenwende'*, although these effects are far less public than those in Germany. But considerable changes can be observed in the French data. In line with developments in Germany, this applies to perceptions of Russia and the war in Ukraine generally. But there are a few idiosyncrasies that are worth mentioning.

First, compared with the other three countries in this poll, French respondents exhibit the most distance from the Ukraine war with the highest number of 'don't know' answers to all relevant questions. Geographical distance may come into play here, combined with the lower priority given to the war in the media.

Secondly, France shows signs of changing views on military intervention. Whereas in the other three countries the belief that military interventions are effective has become stronger, in France the opposite is the case. The country still shows the highest confidence in military intervention, but the 50% who previously believed this has shrunk to 42%. A similar effect can be observed in relation to the legitimacy of military intervention. The same trend of rising scepticism can be observed regarding military interventions in conflicts. With only 33% currently endorsing military interventions, France is nearly at the same level as Germany, although in 2021 the figure was 45%.

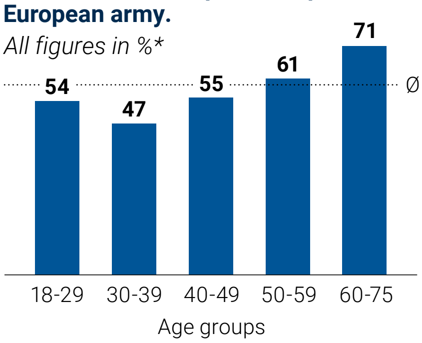
Third, there is a disquieting trend in France when it comes to its relations with the European Union. Whereas the other three countries would trust the EU with playing a bigger role in the future, French respondents show the opposite trend: while in 2021 63% agreed to such a role, in 2022 that shrank to 53%. The same trend can be observed when respondents are asked whether French interests are regularly in conflict with those of the European Union: some 46% agree (just one point lower than in Poland and four points up from 2021) and just 30% disagree (down from 38% in 2021). Support for more collaboration between France and the EU is on a similar trajectory. Here approval has also shrunk by 7 points to 52%, the lowest number among the four countries. And although the absolute numbers still show majority support for the EU in France, the trend makes for an uneasy read in relation to one of the key actors of European integration.

Unease concerning the French role in European integration is deepened when we look at the figures on trust and preferences as regards leadership. The Franco-German engine seems to be running on very low levels of public confidence: only 12% of French respondents currently trust Germany and would like Berlin to be a future leader in EU security policy. The picture is roughly the same in the other direction. When it comes to Poland, however, French respondents' level of trust is barely measurable, at 2%.

An interesting side-note in our poll is the age-distribution with regard to all questions that refer either to an active French foreign policy or a strengthened role of the country (or the European Union). The highest support comes from the oldest age-group (60–75), and the lowest from one of the two generations between 30 and 49. The youngest age group (18–29) is usually a little more supportive on these issues than the slightly older one, without reaching the levels of the oldest generations. Support for a European army can be used as an exemplary age-distribution for these questions. Active foreign policy, interdependence or strength seem to be elements that the older French generation identifies with more than the younger respondents do, hinting at a changing self-perception in international relations. The belief that France is taking an active role in EU security policy follows the same pattern.

In order to be on an equal footing with other great powers, the European Union must build up its own powerful European army.

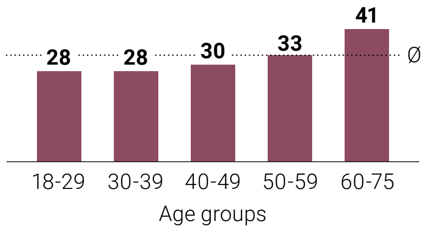
*All figures in %**



France is taking an active role in a common EU security policy

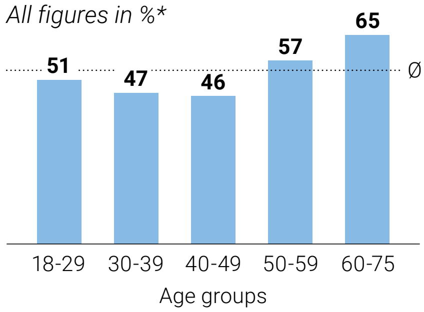
All figures in %

Deviations from 100% result from: "It is blocking a common EU security policy", "It is merely going along with the decisions of other member states", "don't know" and "no answer"



France should pursue an active foreign policy and play a significant role in solving international problems, crises and conflicts.

*All figures in %**



**Combined responses "strongly agree" and "somewhat agree". Deviations from 100% result from: "don't know" and "no answer".*

Poland

[Assertive and ambitious]

It might be a stretch to use the term *'Zeitenwende'* for Poland. A more fitting description would be not 'turning point', but rather 'line of acceleration'. Polish perceptions of Russia have not changed but rather deepened. The Security Radar 2021 already showed a country fairly invested in the fortunes of Ukraine, and this is confirmed in the 2022 poll. But there are interesting findings in some of the European aspects of the Polish poll. First, although the Polish government seems to have been on a collision course with the European Union for years now, the population shows few signs of anti-Europeanism. Just 47% believe that Poland's interests are regularly in conflict with the EU, which brings Poland close to the French level. However, 71% of Polish respondents believe that their country should cooperate more with the EU, which is considerably more than in France or Germany.

A potential leadership role for Poland in EU security policy is another interesting item, exhibiting a number of nuances. It is the only country in the Weimar Triangle whose respondents would trust a collective leadership of the three Weimar countries more than the leadership of their own country, indicating some scepticism towards their own government when it comes to leading Europe.

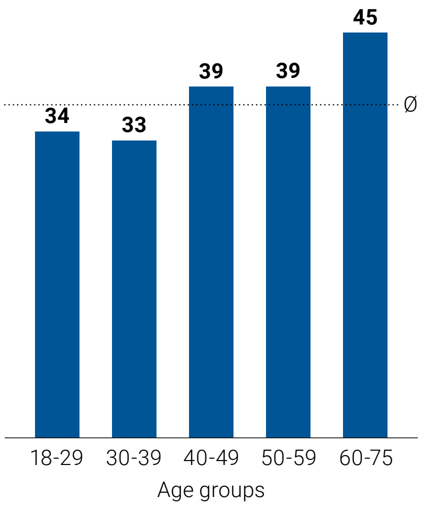
Polish responses also show, throughout the survey, a country firmly supporting Ukraine and standing clearly against Russia. But the red line of sending Polish soldiers into the war is also very marked. The differences on this item between Poland and the other three countries are small and show that there is a general agreement on what not to do in this war, at least as far as public opinion is concerned.

Lastly, Poland is the only country for which the survey reveals a belief that it is being strengthened by this war. Some 35% of Polish respondents think that this war has made their country stronger, while only 23% believe it has made Poland weaker. Counterintuitively, there is a considerable majority of 60% in Poland, marginally more than in 2021, who believe that their country does not have the status in the world that it deserves. It can be assumed that there is a perception that Poland is playing a central role in Europe and NATO in this war, not least by hosting more than 1.5 million war refugees, but that this effort hasn't been adequately acknowledged by all its international partners.

Interestingly, Poland is showing comparatively little concern about the role of China in relation to European security. Only about 44% of Polish respondents regard China as a threat to security in Europe. However, there is a generational split. Whereas in the oldest generation only 38% share this view, the figure reaches 50% among those aged 30–39.

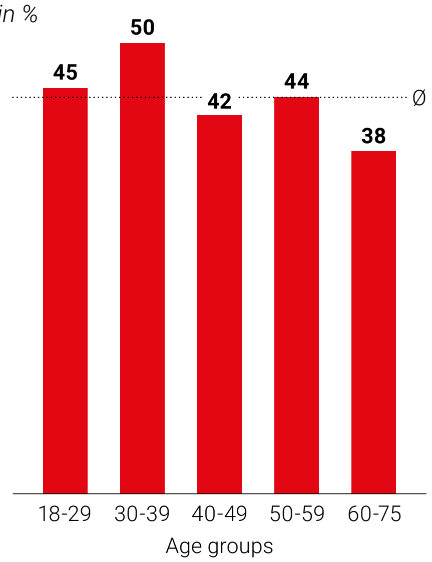
Poland should collaborate more with China than before.

All figures in %



China is a threat to peace and security in Europe.

All figures in %



Combined responses "strongly agree" and "somewhat agree". Deviations from 100% result from: "don't know" and "no answer".

Latvia

[Concerned and reaching out]

The Baltic state is an outlier in our poll as it is not part of the Weimar Triangle. However, a comparison between the two reveals that there is a clear gap between the East and the West European perspectives on security in Europe. As in the case of Poland, Latvia shows no signs of a *'Zeitenwende'*, but also rather a reinforcing of pre-war opinions. Additionally, in contrast to Poland, public opinion is not homogenous: on a number of issues, a sizeable minority exhibit a different response pattern from the majority. For instance, in Latvia we observe the highest numbers of respondents believing that their country should cooperate more closely with Russia (25%) and the highest margin of disagreement with the statement that Russia is a threat to security in Europe. Moreover, we find the highest percentage of respondents believing the United States to be a threat to European security (30%) and even the highest number of respondents believing that the United States is responsible for the escalation of the war in Ukraine (23%).

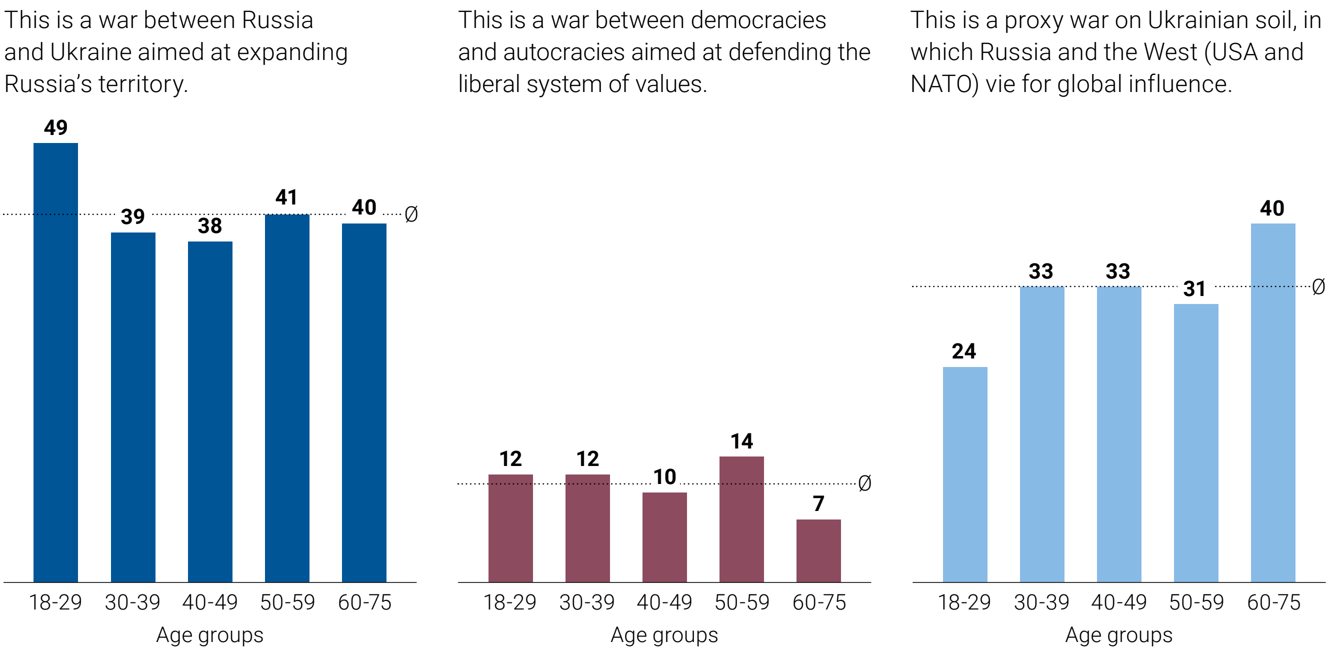
Based on other studies of Latvian public opinion, it can be assumed that these responses can be attributed at least partly to the Russian-speaking minority in Latvia. Previous studies have demonstrated that on a number of issues, particularly those related to Russia, the Russian-speaking respondents consistently show diverging response patterns from Latvian-speaking respondents.

Another aspect that distinguishes Latvia from the other three polled countries is the high awareness of international interdependence, as well as trust in international organisations. Latvia displays the highest percentage of respondents agreeing that their prosperity depends on the well-being of other countries (70%) and also the highest endorsement of a pragmatic approach to international cooperation: some 71% agree that their country should cooperate with other countries, even if they do not share their values.

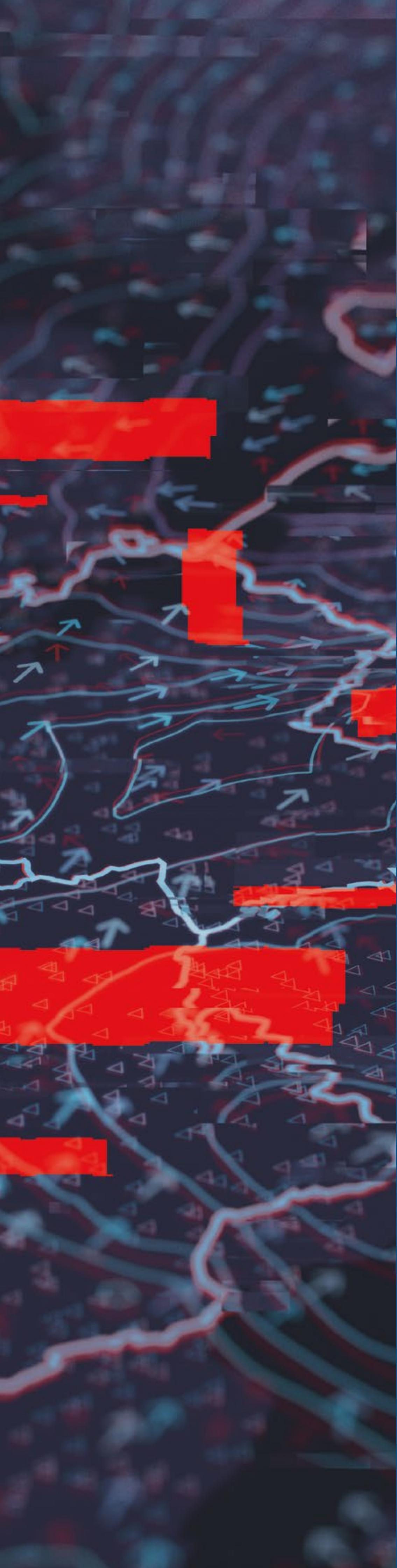
Interestingly, there is a considerable generational gap in Latvia when it comes to characterising the war. Whereas 40% of the oldest generation (60–75) believe this war to be a proxy war on Ukrainian soil, in which Russia and the West are vying for global influence, this view is shared by only 24% of the youngest generation (18–29 years of age). Almost half of the youngest generation believe that it is a war between Russia and Ukraine aimed at expanding Russia's territory, whereas the rest of Latvian society shares this view to a significantly lower degree (about 40%).

Characterisation of war

All figures in %



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



Analysis

- Key take-aways
- Strategic autonomy
- Challenges ahead

Key take-aways

Seeing themselves as 'support crew' allows Europeans to continue strengthening Ukraine in the war without risking becoming a party to it.

Comparing public opinion in Germany, France, Poland and Latvia between autumn 2021 and autumn 2022 shows that perceptions of conflicts and appropriate ways of reacting to them changed substantially. Russia's unabated attack on Ukraine has brought back fears of war and engendered a deeper understanding of the issues concerning the broader frame of this war.

The four polled countries start from different places, but there is a prominent tendency towards convergence. People's concerns about war and conflict in general and about Russia more specifically were high in Poland and Latvia even before the Russian invasion, whereas respondents in France and Germany were less concerned. In these countries, war seemed a distant, if not improbable prospect. While these differences are still visible throughout the survey, they have diminished.

Convergence

The area of main convergence is a common awareness that Russia is the aggressor, responsible for the war in Ukraine, a threat to European security and a potential enemy of one's own country. People are not optimistic about the future: they fear wars and conflicts in general, including a possible war between Russia and the West, and are highly concerned about a nuclear escalation. Accordingly, the citizens of the polled countries share worries about their personal futures and a possible deterioration of their personal economic situation, coupled with an overwhelming fear of economic crisis.

The respondents generally show a better understanding of developments in Ukraine than in 2021, as the number of people opting for 'don't know' to questions about the war has decreased considerably. The survey shows stable support for Ukraine, but no willingness to become embroiled in the war. Thus, softer measures in support of Ukraine are approved of across the board, namely sanctions and decoupling from Russian fossil fuels, even though there is a hint of caution when potential price increases are mentioned. The provision of weapons, however, is politically contested and divides societies. Even in Poland, where support for Ukraine is most clearly expressed, a sizable part of respondents reject the provision of more weapons to Ukraine, whereas the other three countries are split equally.

When looking at how respondents characterise this war and how their countries are connected to it, a clear line is discernible between support and participation. The red line is direct involvement by sending their own troops to Ukraine. Such a policy is overwhelmingly opposed in all four polled countries. This unequivocal attitude indicates a recognition of escalatory risks among citizens, possibly related to the growing awareness of a possible direct military conflict between Russia and the West. The threshold between 'support crew' and 'main act', which seems to be the guideline for respondents, is also expressed in the framing of this war in neither ideological nor geopolitical terms, but rather as a bilateral conflict between Russia and Ukraine. This frame allows the expression of continued but limited support, without being in danger of becoming a party to the conflict.

What does this mean for policymakers? European citizens seem to be buckling up for a longer conflict. The war is widely expected to go on for the foreseeable future, with respondents not discerning a path towards its end. There is a clear wish to stay out of it, but nonetheless to support Ukraine the victim against the aggressor Russia. This allows for a continued sanctions regime, as long as it's combined with packages mitigating the effects on energy prices. The provision of ever more sophisticated weapons needs to be explained continuously and thoroughly, as the data indicate that it could become a polarising issue. The hedging of escalatory risks is also broadly supported and should be strengthened.

Looking at the larger context of the war, respondents in the four polled countries broadly share views on a number of crucial issues, such as endorsing increases in military spending, supporting stronger cooperation between NATO and the EU, as well as assigning priority to peace, the importance of diplomacy, and the peaceful mitigation of conflicts.

Differences

Although respondents across the four polled countries show convergence on a number of issues, there are still notable differences, which often run along the East–West line.

Two key divergencies pertain to an adequate response to the war in Ukraine. One concerns potential Ukrainian membership of NATO and the EU: Polish and Latvian respondents are clearly in favour, while German and French ones are not, although approving attitudes in the latter two countries have significantly increased compared with one year ago. The second divergence concerns ways of ending the war: German and French respondents are firmly in the so-called 'peace camp', wishing to stop the war as soon as possible, even at the cost of territorial losses for Ukraine. Latvian and Polish respondents, by contrast, opt neither for the 'peace' nor for the 'justice' camp. By the same token, belief in Ukraine's military victory as a likely outcome of the war is much more pronounced in the East than in the West. The differences in perception of these core issues partly run in parallel with political differences between the respective countries and underscore the complexity of the situation.

Another important issue of divergence is the question of China: respondents in the East are less wary of China and less willing to decouple from it than those in the West. This may hint at a potential future dividing line within the EU in formulating a common China policy.

A few foreign policy issues are generally supported across the board, but to considerably different degrees. For instance, Poland and Latvia are much more amenable than France and Germany to a pragmatic foreign policy, or cooperation with non-like-minded states for the sake of promoting peace and security. In a similar vein, concern about disagreement and conflict within the European Union is high across the sample, but much more pronounced in the East than the West, especially in Poland. This may reflect the fear of European disunity in the face of resisting Russian aggression. Last but not least, on the desirability of a stronger role for NATO, Latvia and Poland exhibit stronger pro-NATO attitudes than Germany and, especially, France.

In sum, while differences remain, the war has brought threat perceptions among the polled countries closer together. Going forward, will this be a stable enough base on which to build common policies towards security in Europe? Closer examination of the Franco-German engine and the Weimar Triangle (France, Germany and Poland) indicates that a solid basis of converging perceptions may not be strong enough to balance the considerable differences and lack of trust. This has strong political relevance for the future of the EU as a global actor, its prospects for strategic autonomy, and the challenges that lie ahead.

In sum, while differences remain, the war has brought threat perceptions among the polled countries closer together.

Strategic autonomy

Strategic autonomy is itself a fuzzy issue, difficult to grasp and even more difficult to define. For this survey, however, we have defined European strategic autonomy as the European Union's ability to pursue its own security policy. In this regard, the Russian war against Ukraine can be regarded as a setback and a final call at the same time.

European security policy was born during the wars in the Balkans, when Europe was confronted with its inability to act decisively in that crisis. This pattern has repeated itself in subsequent crises, with only marginal improvements. The Russian war is thus a formative event for EU security policy. Confronted with this fundamental crisis of the European security order, the necessity for the EU finally to become able to act strategically is undeniable. The question is thus how this strategic autonomy can be achieved.

The good news is that the war has served as a catalyst for convergence on national views regarding Russia. This common threat perception could give direction to European strategic autonomy, in line with the EU's Strategic Compass. However, there is also a concerning aspect in the threat perception – hinting at potential future for conflict – when it comes to China. Despite the discernible recognition of a Sino-Russian bloc formation, perceptions differ significantly. Here, European roles are reversed: whereas Poland and Latvia are rather more hawkish on Russia, both are comparatively more dovish when it comes to China.

The war has also ended deliberations on an EU security policy that would be substantially independent of NATO. Our poll shows that respondents throughout the polled countries agree on the desirability of the two organisations cooperating closely. There is, however, recognition of the importance of a more prominent role for the EU in security matters. Nonetheless, comparing perceptions of the current as well as future roles of the EU and NATO reveals an interesting picture. When looking at their current influence on international politics, both organisations were practically at the same level in 2021. The war against Ukraine and NATO's strengthened role have left their mark, as respondents now regard NATO as considerably more influential than the EU. The revitalisation of the previously 'braindead' Alliance is clearly discernible in popular perceptions. This is also responsible for the preferences for cooperation between the EU and NATO. Only in France can we find significant support for an EU security policy that is independent of NATO, albeit below 25%.

That points to another important aspect of the survey. There is a growing sense that global blocs are developing, with the EU, the United States and NATO forming one, and in another Russia and China, which seem to be getting closer and closer. Perceptions of conflicting interests as well as preferences for collaborating with major global actors are just two parts of this picture.

When it comes to the EU, there is a clear desire for the EU to play a more influential role in the future. Clear majorities support this. One of the more tangible issues in this regard is a European army. Between 2021 and 2022 support for a European army was bolstered considerably, while resistance to it diminished significantly. Such an instrument, whether it be a twenty-eighth army to be built up in parallel with national forces or a collective force consisting of national parts, would thus be an embodiment of a European ability to act that enjoys popular support. Such an army could also serve as a lifeline of European strategic autonomy in light of the rather diverging interests of the Member States that would need to come on board.

Weimar triangle

When it comes to the drivers of European strategic autonomy, the Member States, we observe a disquieting picture of divergence on a number of crucial issues. The data reveal that the classic configurations within Europe, such as the Franco-German engine or the Weimar triangle, could prove dysfunctional because of these divergences.

A look at the German-French engine reveals a mixed picture. Overall, the foundations of German security policy have been shattered by the war in Ukraine and the country is seeking a new paradigm. At the same time, the data show the continuity of a culture of restraint in Germany despite some major shifts in perceptions. Equally, French respondents equally appear to be reconsidering some former security policy beliefs. The extent of disillusionment with Russia is a case in point, and French and German levels of concern about new wars in Europe have more than doubled. Overall, however, in France the process of readjusting to new security realities appears to be a less radical and fundamental process than on the other side of the Rhine. While we observe an important convergence between Germany and France in attitudes to military means in foreign policy, significant divisions remain. Formerly supportive French attitudes to military intervention in conflicts has converged with deep-seated German scepticism. But France and Germany still diverge on the permissibility of military action abroad for the sake of warding off dangers to their own countries, as well as on the effectiveness and legitimacy of military means of addressing crises.

If we look at the Weimar triangle by adding Poland to the picture, things become even more complicated. Polish perceptions often run counter to French and German ones, which further complicates joint policy formulation within the Triangle. In Poland we find an increased assertiveness, coupled with self-assurance and a new understanding of their own role in international politics. Poland stands out as the country with the most pronounced pro-Ukrainian and anti-Russian sentiments, the highest threat perception, the strongest endorsement of increased military spending, as well as the strongest desire to decouple from Russia and widen sanctions, coupled with a considerable belief in Ukraine's military victory.

Poland feels strengthened by the war, fuelling talk of a new centre of gravity in Europe forming in Central and Central Eastern Europe, with Warsaw as its hub. This new Polish assertiveness engenders leadership aspirations in the EU and challenges the Franco-German engine. Already, political choices are consolidating these divergent trends. Poland's decision to invest heavily in its military, up to 3% of GDP, as well as its investment in American and South Korean tanks instead of European systems, could lead to new imbalances in European defence capabilities, as well as to a further weakening of Europe's defence industry base. Both could negatively influence any attempt to realise EU strategic autonomy.

Mutual trust is low inside the Weimar triangle. In Poland, trust in France and Germany is disquietingly low, and vice versa. Perceptions of Poland as an actor in European security policy appear divided: while the country is viewed as a leader by its own people, as well as by Latvians, it is viewed as a follower or even an obstructor in European foreign policy by France and Germany.

Public perceptions of Germany, often designated as a leader of European policy, are equally divided: viewed as a leader by France and Latvia, Germany is rather viewed as an obstructor by Poland, and is believed to be merely a follower by its own citizens.

Despite distrust within and the dysfunctionality of the Weimar triangle, there is a grain of hope in the fact that the polled citizens put trust in the trio itself. Germany, France and Poland together as a desired and trusted leader of the EU appears for all polled countries as the best or second-best (after their respective own country) option.

The way forward in the EU

There has been a lot of talk about 'geopolitical Europe' or an EU that learns to speak the language of power. But the proof of the pudding is in the eating, and the Russian attack on Ukraine has brought dinner time closer. It is a historic moment for the EU and its ambition to be a security policy actor, if it manages to reconfigure and to do it fast.

Priority should be given to the hard issues facing the Union. A first step would be to acquire capabilities for the EU – a 'European army' could be an appealing headline for that purpose. A second step would be the ability to deal with political differences that might arise from convergent threat perceptions, because conclusions on how to move forward differ substantially. As many instances during the Russian war against Ukraine have shown, the European Union has been able to close ranks and take hard decisions on sanctions, as well as on support packages for Kyiv. Nonetheless, the quality and timing of weapons deliveries to Ukraine has been highly contested between the European Member States involved and has undermined the Union's ability to act coherently.

There is thus a need to stop the obfuscations around terms such as strategic autonomy, strategic sovereignty, or 'Weltpolitikfähigkeit' (capacity to operate as a global political actor) and start implementing achievable goals, before the differences become too deep. To achieve that, the EU needs to change the way it works. Rifts between major Member States and huge question marks about who could be the driving force inside the Union call for a reconfiguration. The Franco-German engine or the Weimar triangle currently appear disabled, therefore other mechanisms need to be found in order to test the new ground on which EU security policy stands after the Russian invasion of Ukraine. Paradigmatic changes in national strategic cultures have already had considerable effects on EU security policy. Looking forward, they increase the likelihood that these changes will make it more difficult, rather than easier, to find a common denominator for security in the EU. The wake-up call of 24 February 2022 needs to be heard, otherwise the setback could prove insurmountable in the future.

Challenges ahead

Taking the empirical data of our poll as point of departure, in this outlook we want to zoom out and look at the major challenges ahead.

The war has shaken the rules-based international order to its core. When aiming to restore this order, the European focus should be along three dividing lines:

First and foremost, a major interstate war is taking place in Europe, in fact the biggest land war in Europe since the Second World War. The immediate parties to the war are the aggressor Russia and the victim Ukraine, but the broader West is undoubtedly involved. It supports Ukraine with sanctions against Russia, as well as financial and arms transfers. On the other side, Russia professes to regard itself as in a direct war with the West.

Secondly, we are witnessing a deepening rift inside Europe between Western and Eastern countries, which is exemplified in this survey by the differences in perceptions in Germany and France, on one hand, and in Latvia and Poland on the other.

Thirdly, a broader ideologically charged conflict between democracies and autocracies is taking shape which has the potential to play an increasingly important structuring role in the international system.

The urgency of these dividing lines and their simultaneous and interconnected nature make them the most pressing European security challenges today.

Russia versus Ukraine

Comparisons with the Cold War obfuscate the degree to which the world is entering uncharted political territory.

Let's start with the first and most dramatic case, the war between Russia and Ukraine. Here, the current challenge for the West is to sustain support for Ukraine at all levels, including the military, to help the country prevail, while avoiding direct confrontation between NATO and Russia. The respondents' red line (no troops in Ukraine) is clear and policymakers are aware of it, but nonetheless it is a thin line to walk. The dynamic of Western support over the past year shows a steady increase in the quality and quantity of delivered weapons, while at the same time trying to hedge the risk of escalation and defining commonly-agreed objectives. Hedging is proving difficult because wars have a tendency to spin out of control and produce chaos.

Although this course of action seems to be reminiscent of the Cold War – a period that in hindsight seems rather stable – the current situation is different. The Cold War was never as hot as the current conflict between Russia, on one side, and Ukraine and its supporters on the other. Even the Cuban Missile Crisis in 1962, but also other crises (Berlin in 1948, Able Archer in 1983), with massive potential for escalation, were followed by a period of détente or security stabilisation within a few days or weeks.

By comparison, the current strategic and operational environment looks like a constant tightrope walk between (supposedly) controlled escalation and (apparently) well-calculated rational acts that are supposed to avert the worst. Therefore, the comparison with the Cold War obfuscates the fact that the world is entering uncharted political territory with this confrontation and that there is no precedent for this situation. Additionally, in this case, strategic unclarity on the side of the West complicates issues even more.

East versus West

Although Russia obviously appears to be the greatest security threat in the four countries surveyed, this does not automatically translate into a common strategy for action. Three major unanswered questions stand out and are directly linked to the ongoing war in Ukraine. First, what does the current war mean for NATO enlargement? Second, and far more urgent, what is the exact military aim of weapons supply? Different scenarios are being discussed, from the retaking of Ukrainian territories occupied since 24 February 2022, to the end of the Russian military presence inside the internationally acknowledged 1991 borders of Ukraine, up to a long-term weakening, if not outright military defeat of Russia. And third, what will be the next step, if the current provision of support proves insufficient in achieving even minimal goals?

Currently the US leadership is papering over these questions, but the fissures within the EU remain. Despite the overwhelming rhetoric solidarity with Ukraine there are national differences in strategic objectives. These can be connected to the respective public perceptions in our survey, hinting, for example, at how far Germany is willing to go in supporting Ukraine or in defining the *'Zeitenwende'*, or how far Berlin is willing to compromise on ending the war compared with Warsaw.

Defining a common strategy towards Russia within the EU has been difficult for many years, even more so since Russia's annexation of Crimea. The Russian invasion of Ukraine has made this task even more difficult, as the internal European differences become yet more visible in the public eye. The *'Zeitenwende'* is obviously not seen in the same way in different parts of Europe. Under the pressure of the war in Europe, changes in strategic culture could thus deviate from each other even more. It is becoming obvious that some of the strategic conclusions drawn from this war are diverging within the West. This fact is becoming a challenge as the war drags on, given the danger of increasing divisions between Western and Eastern Europe.

Democracies versus autocracies

The looming ideological conflict between democracies and autocracies makes matters even more complicated and dangerous. Added to Russia's aggressive foreign policy, concerns about China's ever-growing influence in the world and its revisionist ambitions have bolstered the emphasis on the opposition between democracies and autocracies. For the time being, China remains the only systemic rival with sufficient resources (economic and, increasingly, military) to challenge the United States for global dominance.

The disruption of supply chains during the coronavirus pandemic, the impact of sanctions regimes, shortages of key commodities and economic protectionism as a result of trade wars have led to a heightened awareness of potential vulnerabilities in the new, less rule-bound world.

In this context, the EU finds itself in a bind. On one hand there is a tendency, also visible in our survey, to view economic relations through the prism of a democracies-versus-autocracies paradigm, and to structure its economic policies accordingly. That would mean decoupling from non-like-minded partners. On the other hand, European prosperity is founded on a globalised economic world and strong economic relations with markets worldwide. An understanding of this causal relationship among European populations is also visible in our poll. The EU is caught between these two poles of continuing to build on its economic model of past years and seeking more economic independence by decoupling from certain major markets. Currently, people are afraid of economic crises and fear for their prosperity. Thus, finding an equilibrium between dependencies and independence that is publicly accepted will be a challenge for the coming years. However, there seems to be a silver lining: the public acceptance of disengagement from China, at least to a moderate degree, and even more so from Russia, that we find in our data might be due more to perceptions that these actors are unreliable as suppliers and to fears that they may use economic dependencies as a foreign-policy tool rather than to assessments of the quality of their regimes. The notion of a new conflict between democracies and autocracies that could shape the world is currently not broadly shared by our respondents, partly because of an understanding of the mutual benefits resulting from interdependencies.

Looking at the evolving pattern of actors along the democracies–autocracies spectrum,

Europeans generally do not share the notion of a conflict between democracies and autocracies – they understand the mutual benefits of interdependence.

there seems to be a closer relationship between Russia and China, with the former increasingly economically dependent on the latter. Some analysts even describe Russia as China's junior partner. What this perspective overlooks, however, is the divergence of interests between these two countries.

A similar observation could be made about the Western part of the spectrum. Although the Western alliance is coherent and united in its approach towards the war in Ukraine, following the leadership of the United States, this might be the result of current and potentially volatile political circumstances in Washington. The collective experience of President Trump's foreign policy towards Europe, and more recently, the poorly coordinated withdrawal from Afghanistan remind us of the pitfalls of such a deep asymmetry in security relations between Europe and the USA. The temporary complementarity between European and US security policy should not be confused with permanent unity.

Temporary complementarity between EU and US security policy should not be confused with permanent unity.

The challenge for the EU is therefore significant: how can the Union make itself perceived as a sovereign and attractive partner by the Global South in order to shape the changing multilateral order in its own interest? In a systemic competition with China and Russia, the EU has important economic and norm-setting clout. What remains open, however, is whether this can contribute to a European strategy, if it is not bolstered by similar capabilities in the area of security policy. Currently, ambitions to make the European Union more robust and self-reliant in security and defence policy seem to have withered, while the United States is pursuing a strategy of consolidating its alliances to hedge against China. The most blatant example of the different approaches is the AUKUS deal, in which the United States pursued its national aims without taking European allies and their interests into account.

From confrontation to stabilisation?

The Russian war against Ukraine has thrown the world into a confrontational security order for the foreseeable future. As elaborated above, such an order is by definition unstable, fairly unpredictable and bears a constant risk of unintended escalation. Obviously, the outlines of this future international order depend on the outcome of the war and can thus still be shaped. However, settling for a supposedly stable Cold War-style confrontational order could prove to be a huge mistake. Although the war in Ukraine is the focus of much political attention at present, there are other issues on the horizon that need to be dealt with, the climate crisis being the most worrisome. Therefore, it must be ensured that the current confrontational structure is not cemented into political mindsets and international institutions. Stabilisation and the avoidance of further escalation should therefore be guiding policies. In the short term, this means finding a way to end the war in Ukraine or at least achieve a cessation of hostilities. This is by no means easy as it needs to be avoided that such attempts further erode the rules-based international order.

In the medium term the war is a final reminder that a balanced Western policy towards Russia must be found. Maintaining a principled stand and continuing support for Ukraine's territorial integrity is the cornerstone of this policy. Such a balance may also include the maintenance of diplomatic channels of communication, especially between Russia and the United States, other bilateral relations, but also inside the existing multilateral structure of the UN and the OSCE. These channels need to be complemented by third countries, such as Switzerland, Turkey, the Emirates, or even China acting as mediators and helping to resolve the urgent matters at hand. The grain deal is an example of this. In addition, the need remains for at least issue-based cooperation to address global challenges such as the climate crisis or terrorism. The OSCE provides a multilateral framework that allows for cooperation on such matters, even between non-like-minded states.

The long-term goal, and therefore the pragmatic and realistic response to the three outlined divisions, is the creation of political conditions for a sustainable stabilisation of security, based on respect for commonly agreed principles and reconciliation of conflicting interests. The Helsinki Accords were possible even at the height of the Cold War, so it should not be unthinkable now to imagine a future beyond confrontation.

Recommendations

Cracks within the EU

As the war drags on, there is a risk that different parties will draw diverging strategic conclusions. Differences between Western and Eastern Europe may complicate the formulation of a common strategy towards ending the war, dealing with Russia and making the EU a stable pillar of European security. However, these divisions must be addressed if the EU is to become a sovereign and attractive partner for the Global South in the long term, capable of shaping the changing multilateral order in its own interest.

Russia's war against Ukraine

European governments should sustain support for Ukraine at all levels, including the military, to help the country prevail and restore its territorial integrity.

At the same time it is important to avoid direct confrontation between NATO and Russia and stick to the red line of not sending troops to Ukraine.

In the long run, a confrontational structure should not be cemented into political mindsets and international institutions. Besides confrontation, multilateral cooperation is needed to address global challenges such as the climate crisis.

Democracies versus autocracies

In the systemic competition with China and Russia, the EU as an economic powerhouse can contribute to a European strategy only if bolstered by similar security policy capabilities. The notion of a new conflict between democracies and autocracies that could shape the world should be counterbalanced by a careful assessment of the mutual benfits resulting from interdependencies. An overemphasis on ideological conflict could endanger economic growth models, as well as the ability of multilateral institutions to influence responses to global challenges.

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