



# 2022 Transatlantic Trends

Public Opinion in Times of Geopolitical Turmoil

# Table of Contents

<b>02</b>	Methodology
<b>04</b>	Foreword
<b>05</b>	Summary of Key Findings
<b>07</b>	Global Order
<b>22</b>	Transatlantic Relations
<b>35</b>	Security and Defense
<b>50</b>	China
<b>61</b>	About the Partners
<b>63</b>	Acknowledgments

# Methodology

This section describes the methodology used for Transatlantic Trends 2022. For methodologies and countries polled in 2020 and 2021, please refer to the methodology sections of those reports, available at <https://www.gmfus.org/transatlantic-trends>.

The 2022 survey was conducted in 14 countries, so that trends over time can be observed in several countries.

Overview of the Countries Covered in This and Previous Editions	2022	Canada, France, Germany, Italy, Lithuania, The Netherlands, Poland, Portugal, Romania, Spain, Sweden, Türkiye, United Kingdom, United States
	2021	Canada, France, Germany, Italy, The Netherlands, Poland, Spain, Sweden, Türkiye, United Kingdom, United States
	2020	France, Germany, United States

## Statistical Details

Kantar Public was commissioned to conduct the survey. In all countries, a sample based on national standardized quota of approximately 1,500 men and women, 18 years of age and older, was interviewed.

Exact Sample Size by Country	Country	Sample	Country	Sample	Country	Sample
	Canada	1,500	Poland	1,500	Türkiye (face-to-face)	1,063
France	1,500	Portugal	1,503	Türkiye (online)	500	
Germany	1,500	Romania	1,502	United Kingdom	1,500	
Italy	1,500	Germany	1,500	United States	1,501	
Lithuania	1,500	Spain	1,500			
The Netherlands	1,501	Sweden	1,063			

The survey was primarily conducted between late June and early July 2022 (see table below for exact dates of the fieldwork).

Fieldwork Period by Country	Country	Fieldwork Period	Country	Fieldwork Period
	Canada	27/06/2022 - 07/07/2022	Romania	27/06/2022 - 11/07/2022
France	23/06/2022 - 30/06/2022	Spain	27/06/2022 - 07/07/2022	
Germany	23/06/2022 - 05/07/2022	Sweden	23/06/2022 - 08/07/2022	
Italy	24/06/2022 - 06/07/2022	Italy	24/06/2022 - 06/07/2022	
Lithuania	27/06/2022 - 05/07/2022	Türkiye (face-to-face)	26/05/2022 - 29/06/2022	
The Netherlands	27/06/2022 - 07/07/2022	Türkiye (online)	20/06/2022 - 05/07/2022	
Poland	27/06/2022 - 08/07/2022	United Kingdom	24/06/2022 - 08/07/2022	
Portugal	28/06/2022 - 08/07/2022	United States	27/06/2022 - 08/07/2022	

With exception of Türkiye, where 1,063 face-to-face interviews and 500 online interviews were conducted, the polling was conducted through online interviews. The data was collected through online access panels with self-completion, and then weighted to match population totals for age, gender, and regional standards in all countries.

For results based on the national samples in each of the 14 countries surveyed, one can say with 95% confidence that the maximum margin of error attributable to sampling and other random effects is plus or minus 2.5 percentage points. For results based on the total European sample, the margin of error is plus or minus one percentage point. In addition to sampling error, question wording and practical difficulties in conducting surveys can also introduce error or bias into the findings of public opinion polls.

## Note on Averages

The survey refers to three types of averages:

- Cross-country average/average across countries: This is the simple average of all countries polled.
- EU average: This is the simple average of all EU member states polled.
- European average: This is the simple average of all EU member states polled plus Türkiye and the United Kingdom.

For Türkiye, the survey refers to the average from the face-to-face and online interviews. The data are weighted according to the relative share of the different interview methods.

## Note on Age Groups

When explaining generational divides in the data, the survey refers to “the youngest” and “the oldest” age groups. These differ across countries since they match respective national standards.

Age Groups	Countries	Age Groups	Countries
18-24	France, Germany, Italy, The Netherlands, Poland	18-24	United Kingdom
25-39			
40-54			
55-64			
65+			
18-24	United States	65+	Romania
25-34			
35-54			
55+			
18-24	Canada, Lithuania, Portugal, Spain, Sweden, Türkiye	18-24	Romania
25-39			
40-54			
55+			

## Note on Values in the Graphics

If values in the graphics do not add up to 100%, this is due to rounding. The exact values are available in the datasets published on GMF’s website.

# Foreword

The geopolitical turmoil of 2022 presents a multitude of challenges for the transatlantic community. From Russia's invasion of Ukraine and China's geostrategic ambitions to the worsening climate crisis and democratic backsliding, greater transatlantic cooperation is of paramount importance. In the face of such challenges, the transatlantic community has largely shown resolve, yet divergences in interests among partners remain.

The 2022 edition of *Transatlantic Trends* reveals major shifts in the transatlantic relationship as well as challenges for the future of transatlantic cooperation. The United States is by far perceived as the most influential actor today, but this influence is not seen as sustainable: respondents predict major geopolitical shifts in the next five years with US influence in global affairs significantly declining while China's rises. While there is massive support for US involvement in European security and defense, the European Union is seen as playing an important role for national security by Europeans, who also consider coordination through the EU as the best way to manage relations with China and Russia. Regarding China, most respondents support a tougher approach by their country toward Beijing, but in the scenario of an invasion of Taiwan there is no appetite for sending arms or troops to the island.

The policy developments the transatlantic community is facing this year are striking, and in some cases unprecedented.

Yet, in times of crisis, we can only expect more difficult decisions having to be made in the months ahead—decisions that require effective communication between governments and citizens. In this context, it is critical to understand how these challenging times and the future look to societies on both sides of the Atlantic. The need to anchor transatlantic cooperation in the perceptions of the public is at the core of the *Transatlantic Trends* project.

*Transatlantic Trends 2022* presents the results of surveys conducted in 14 countries from all corners of the transatlantic community: Canada, France, Germany, Italy, Lithuania, the Netherlands, Poland, Portugal, Romania, Spain, Sweden, Türkiye, the United Kingdom, and the United States. The original data provided by this report is meant to be a helpful tool for policymakers, business leaders, experts, academia, and the media. It also aims at fostering relevant debates, strengthening mutual understanding, and building a positive agenda for transatlantic cooperation.

Divided into four chapters, *Transatlantic Trends* provides a detailed picture of public opinion on core and contemporary issues: global order, transatlantic relations, international security and defense, and relations with China.

We are confident that the findings can inform innovative policy decisions to advance transatlantic cooperation, and offer an intellectual and practical starting point for building a future together based on the priorities and interests of citizens.

**Irene Braam**

Executive Director,

Bertelsmann Foundation (North America), Inc.



**Dr. Alexandra de Hoop Scheffer**

Director of Research, Transatlantic Security

Director, Paris Office, The German Marshall Fund of the United States



# Summary of Key Findings

The United States is still perceived as the most influential actor in the world, but respondents predict its influence will decline sharply over the next five years.

The EU and NATO are seen as important by large majorities for the security of respondents' countries.

There is no appetite for sending arms or troops to Taiwan in case of an invasion by China, with respondents more favorable toward diplomatic actions and joint sanctions.

Assessing relations with China is a challenge for the public. In several countries, pluralities say they do not know whether it is a partner, a competitor, or a rival.

Support for a tougher approach toward China, regardless of the approach other countries might take, is strongest in France.

European respondents prefer working through the EU to manage relations with China and Russia, rather than working with the United States.

Germany is seen as much less reliable compared to last year, with the biggest declines in Poland, Türkiye, the United States, and Spain.

Sweden, Canada, and Germany are seen as the most reliable partners across all countries surveyed.

In Türkiye and the United Kingdom, large majorities say the EU is important to their country's security.

A majority of respondents in Türkiye want their country to address global challenges by working only with democracies.

Overwhelming majorities in Lithuania, Poland, and Romania see NATO as somewhat or very important for the security of their country.

Younger people generally have a less positive view than their elders of US influence in the world.

Almost one-in-three American respondents think that democracy in the United States is in danger, a significant increase from the previous year.

When it comes to new technologies, respondents in many countries prefer cooperation with China rather than being tough with China.

A clear majority of respondents in Europe approve of US President Joe Biden's handling of international affairs, with approval highest in Poland and lowest in Türkiye.

Support for Finland and Sweden joining NATO is strong across the countries surveyed, except for Türkiye.

A strong majority of respondents overall want the United States involved in the defense of Europe, with most significant increases from 2021 in Sweden, Spain, and the Netherlands.



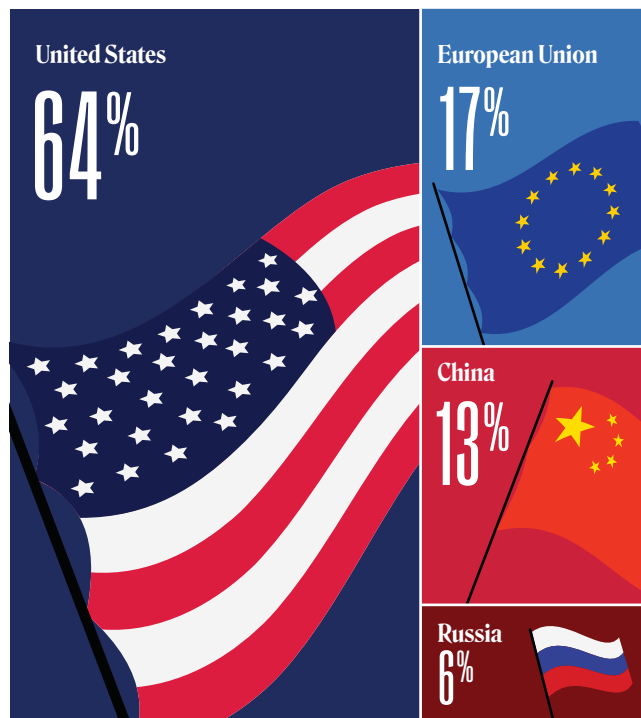
# Global Order



# 01

## Most Influential Actor in Global Affairs

The United States is perceived as the most influential global power (64%), just as in 2020 and 2021. In a shift from 2021, perceptions of the European Union's global influence (17%) are now slightly greater than those of China's (13%).



As global power dynamics continue to shift, variations in perceptions of influence persist within the transatlantic community. As in 2020 and 2021 results, US global influence is viewed as the greatest by American respondents (86%). Perceptions of US influence are significantly lower in all other countries surveyed. Canada records the second-highest figure at 68%, while the European average is 62%. In Europe, Portuguese (67%), Polish (67%) and Lithuanian (66%) respondents are the most likely to view the United States as the having the greatest influence in the world. As in 2021 results, German (61%), British (61%), Swedish (60%), Dutch (59%), French (59%), and Italian (56%) respondents are less likely to share that view.

The EU now has a narrow edge over China, with an increase of three points from 2021 for Brussels and a seven-point drop for Beijing. Respondents in EU member states are now more likely to identify the EU (19%) as most influential rather than China (13%). By contrast, just 10% of Canadians and 4% of Americans pick the EU. Respondents in Sweden (24%), the United Kingdom (22%), and Portugal (22%) are the most likely to see the EU as most influential. Only Italy holds a significantly higher view of China's global influence (24%) than that of the EU (14%). Not many view Russia as the most influential power (6% average), with the highest figure in Türkiye at 10%.

Across European countries, there is a generational gap in perceptions of US and EU global influence while views of Chinese influence are consistent across age groups. Younger European respondents, aged 18-24, are less likely than those in the oldest age group to choose the United States as most influential. This is the case in Poland (39% of the 18-24 vs. 86% of the 65+), the Netherlands (35% vs. 69% of the 65+), Sweden (37% vs. 68% of the 55+), Germany (38% vs. 69% of the 65+), and Lithuania (46% vs 77% of the 55+). There is also a divide between the youngest and oldest European respondents on viewing the EU as the most influential globally, including a 30-point difference in Germany (37% vs. 7%), a 29-point one in the Netherlands (38% vs. 9%), and a 25-point one in Poland (34% vs. 9%).

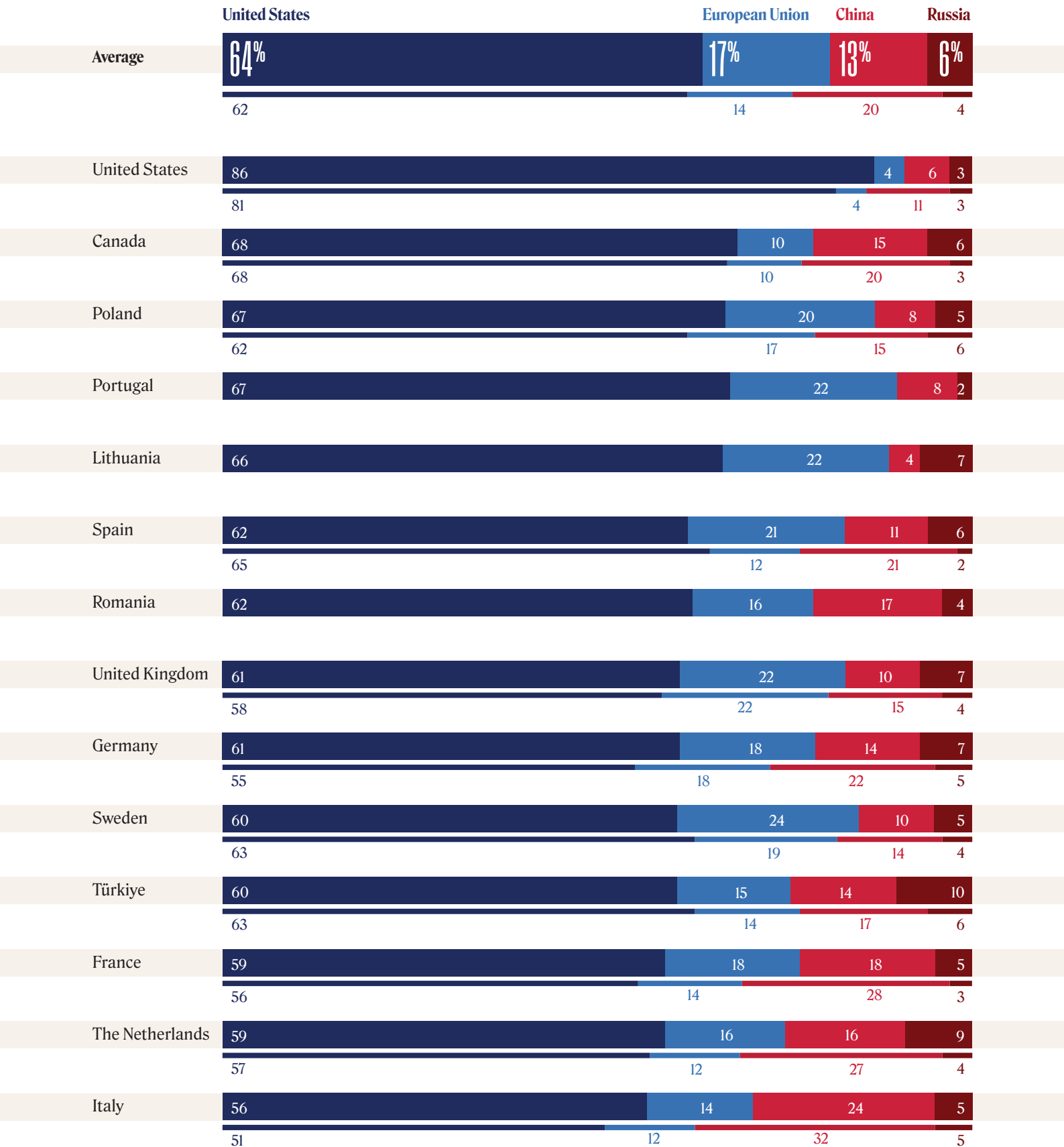
### SPOTLIGHT

There is a noteworthy generational divide in British perceptions of the EU's global influence. As in 2021, just 9% of UK respondents aged 65+ find the EU most influential in global affairs, compared to 37% of those aged 18-24 and 34% of those aged 25-39, with the latter two figures ranking among the highest for all countries surveyed.

# Most Influential Actor in Global Affairs

Rank the following actors in the order of which you think is most influential to least influential in global affairs:

■ 2022 — 2021

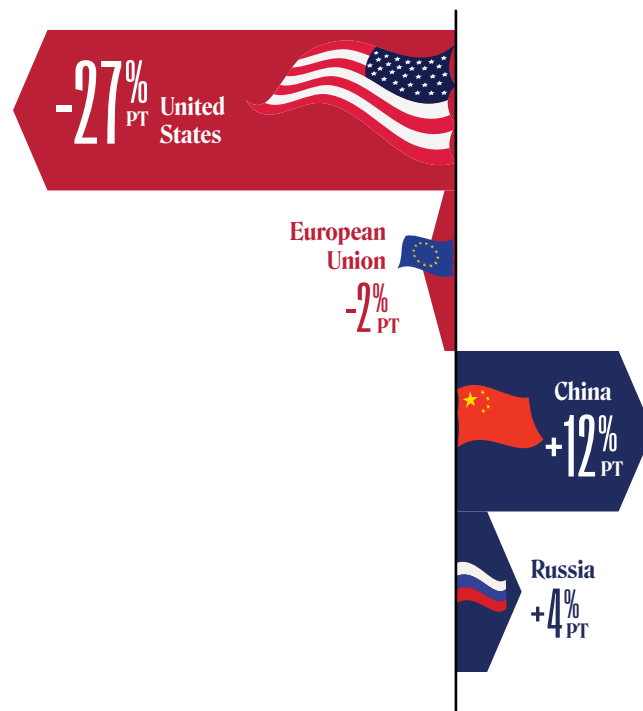


## Most Influential Actor in Five Years

Respondents on both sides of the Atlantic predict the United States' global influence to drop significantly in the next five years, with 37% expecting the country to be the most influential then compared to 64% now. Respondents say the EU's influence will remain relatively steady (from 17% to 15%) while they expect China's to nearly double (from 13% to 25%).

Despite American respondents perceiving US influence as strong, they are pessimistic about the future. While 86% say the United States is currently the most influential global actor, only 60% say it will still be in that position in five years' time. Similarly, while 62% of Europeans and 68% of Canadians see the United States as currently the most influential power, 36% and 35% of them respectively say the same will be the case in 2027. Respondents in Lithuania (47%), Poland (43%), and Portugal (43%) are the Europeans most likely to predict the United States being the most influential global power in 2027, but these figures still represent drops of between 19 and 24 points from their perceptions of current US influence. Respondents in Italy (25%), France (26%), and the Netherlands (28%) have the lowest expectations of the United States being the most influential in 2027, and respondents in Germany (32%) and the United Kingdom (33%) have only slightly higher expectations.

Respondents predict the EU's global influence five years from now not to be very different from what they perceive it to be today. They also predict the influence of China and, to a lesser extent, of Russia to be greater. A notable gap exists in Italy, where 44% expect China to be the most influential in the future and 10% expect the EU to be. There is similar anticipation that China rather than the EU will be the leading actor on the world stage among respondents in France (37% vs. 13%), in Spain (32% vs. 18%), and in Türkiye (30% vs. 12%). Respondents in Lithuania, Portugal, and Sweden expect the EU's future influence to outweigh that of China, albeit by small



margins of up to six points. While Russia's current influence is seen as low, many expect it to grow. For example, 9% of Dutch, 7% of Lithuanian, and 10% of Turkish respondents say Russia is currently the most influential global actor, but 18%, 16%, and 15% respectively say that it will be the most influential five years from now.

A generational divide is evident in perceptions of future influence, with country variations. For example, 73% of American and 43% of Canadian respondents aged 18-24 say the United States will remain the most influential power, compared with 48% and 30% of those aged 55+ respectively. Older Americans and Canadians are more likely than younger ones to choose China as the most influential in the future (25% vs. 7% and 31% vs. 14% respectively).

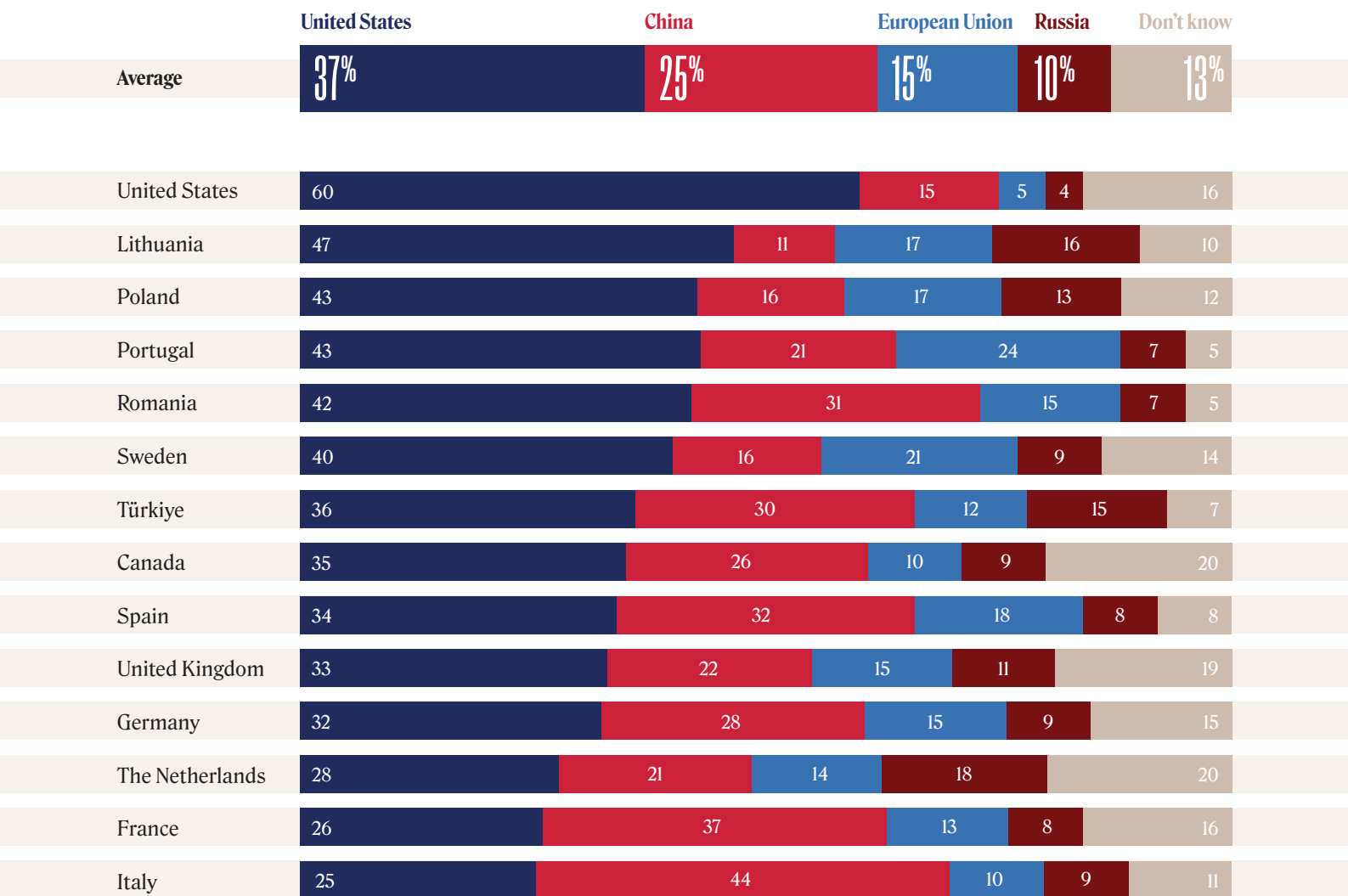
Young respondents in Europe are more likely than older ones to see the EU as most influential. Still, views differ among those aged 18-24. Those in Sweden (36%) and Germany (33%) choose the EU, while those in Italy (34%) choose China. In Romania (50%) and Portugal (36%), they name the United States.

### SPOTLIGHT

While most respondents anticipate either the United States to have a slight edge over China in global influence or for them to be equal in 2027, China is expected to be more influential by the most significant margins in France (37% for China vs. 26% for the United States) and Italy (44% vs. 25%).

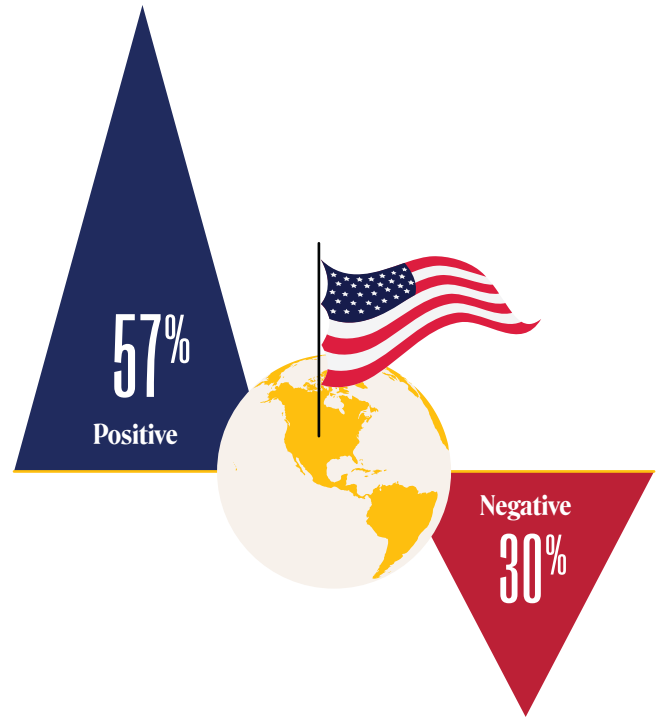
## Most Influential Actor in Five Years

Which of the following actors will be most influential in global affairs in the next five years?



# Sentiment about US Influence in Global Affairs

**A majority of respondents across all countries view the influence of the United States in global affairs as positive, but there is significant national variation as to whether US influence is positive or negative.**



A positive view of US influence in global affairs prevails in 11 of the 14 countries surveyed. The most upbeat views are in those countries nearest Russia: respondents in Poland (74%), Lithuania (73%), Romania (65%), and Sweden (61%) perceive US influence as very or generally positive. Portuguese respondents (72%) are also among the most positive about it. Notably, respondents in countries that are historical allies of the United States have somewhat less positive views of its influence: the United Kingdom and Canada (both 54%), Germany (53%), and France (49%). Italians are more ambivalent with 45% holding positive views and 39% negative ones. Türkiye is the only country with a large majority (67%) with negative views of US influence.

Across the European countries surveyed, positive views of US influence are most commonly held by respondents in the political center. For example, in Germany, Christian Democrats and Social Democrats view US influence positively (72% and 73% respectively). In Italy, positive attitudes are more common among supporters of the Democratic Party (63%) and of Forza Italia (63%). This also applies in France, where positive views toward US influence are most common among supporters of La République En Marche! (73%), the Socialist Party (65%), and Les Républicains (62%) rather than among those of far-left or far-right parties. This partisan divide is also present in Poland, Portugal, and Spain.

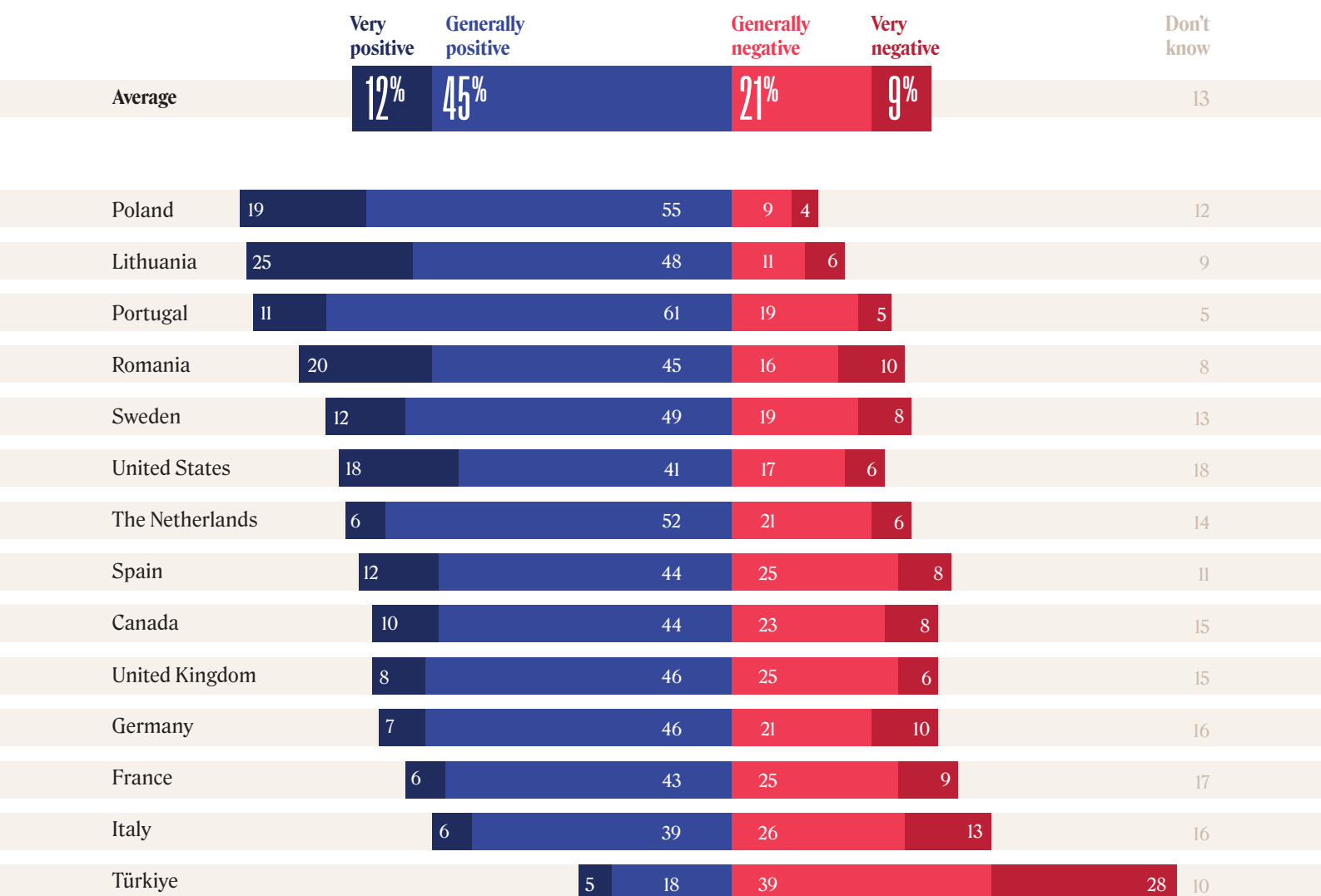
There are also divergences across gender and age groups in many countries. In most of them, men view US influence far more positively than women do, often by more than 10 points. This gender disparity is clearest in Sweden (68% vs. 53%), the Netherlands (68% vs. 49%), and Canada (61% vs. 47%).

## SPOTLIGHT

Younger people generally have a less positive view of US influence in the world. Respondents aged 18–24 in the United Kingdom (41%) and the Netherlands (50%) are significantly less likely to describe US influence as positive than their oldest compatriots (67% in the United Kingdom, 77% in the Netherlands). France is the only significant case where a clear majority of respondents under the age of 25 (57%) view US influence more positively than the oldest respondents (48%).

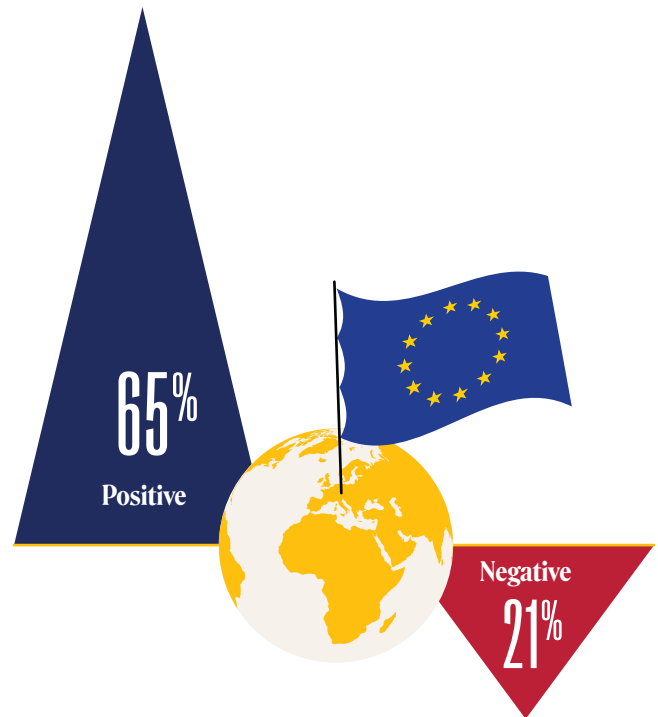
## Sentiment about US Influence in Global Affairs

How do you feel about US influence in global affairs?



## Sentiment about the EU's Influence in Global Affairs

A majority of respondents in all countries, except Türkiye, see the EU's influence in global affairs as positive. Overall, the EU's influence is seen as more positive than that of the United States, China, or Russia.



Across countries, 65% of respondents describe the EU's influence as very or generally positive. The EU is hence perceived to have a more beneficial influence than the United States (57%), and significantly more so than China (27%) and Russia (15%). Portuguese respondents hold by far the most positive view of the EU's influence, with 87% describing it as very or generally positive. Likewise, significant majorities in Lithuania (78%), Romania (74%), Poland (71%), Sweden (70%), Spain, and the Netherlands (69% both) hold very or generally positive views of the EU's global influence.

Respondents in some member states also perceive the EU's influence as positive, if to a lesser extent: Germany (63%), Italy (60%), and France (58%). This makes them broadly comparable to those in the United Kingdom (58%) in their views and only slightly more positive about the EU than respondents in the United States (55%). Canadian respondents hold a more positive view of the EU's influence (68%) than do some EU ones. At the other end of the spectrum, only 35% of Turkish respondents describe the EU's influence in global affairs as positive while 53% see it as negative.

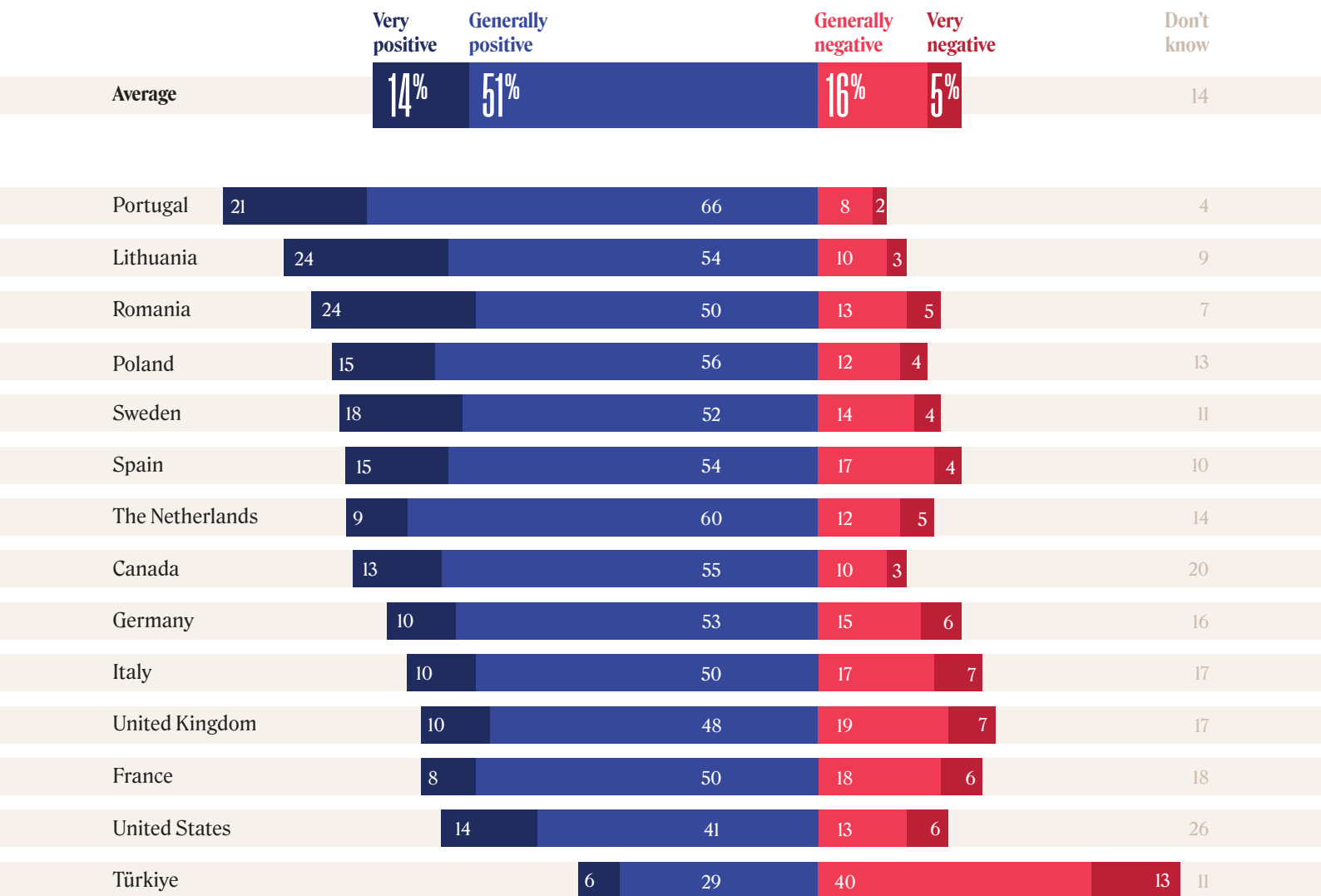
The only noticeable pattern across countries is that supporters of far-right parties in the EU, which are usually Euroskeptic, tend to hold more negative views of the EU's global influence than the national average. This is the case for respondents supporting the Alternative for Germany (58% negative vs. 21% positive), the Party for Freedom in the Netherlands (30% vs. 17%), the National Rally in France (32% vs. 24%), and Vox in Spain (27% vs. 21%). A clear partisan divide can be observed outside the EU as well, with supporters of the Democrats in the United States and Labour supporters in the United Kingdom (both 71%) holding significantly more positive views than the national average.

### SPOTLIGHT

German university students have a particularly high opinion of the EU's influence in international affairs: 80% of them describe it as positive, which is 17 points above the national average.

# Sentiment about the EU's Influence in Global Affairs

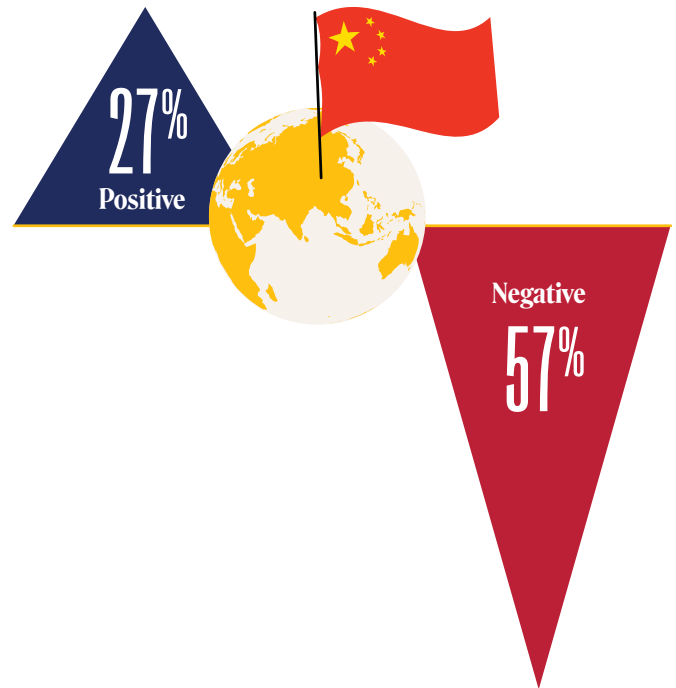
How do you feel about the EU's influence in global affairs?





# Sentiment about China's Influence in Global Affairs

**A majority of respondents across all countries perceive China's global influence as negative, but with significant variations between and within countries.**



Perceptions of China's influence in global affairs have barely changed since 2021. Negative views are strongest in Sweden (66%), Germany (65%), Canada (62%), the United Kingdom (61%), and the Netherlands and Portugal (both 61%). Likewise, negative perceptions prevail in France (58%), Spain (56%), and the United States (53%). Romania is the only country where almost half of the respondents see China's influence as positive (49%), whereas 40% view it as generally or very negative. Besides Romania, the highest shares of respondents describing China's influence as very or generally positive are in Türkiye (30%) and Italy (29%), as opposed to 58% and 51% respectively who see it as negative.

Perceptions of China's influence differ within and between countries. As in 2021, variations are principally related to the age of respondents. Everywhere, the views of those aged 18–24 are significantly less negative than those of the oldest age group, particularly in some countries with the highest shares of respondents who consider China's influence as negative. This age gap is widest in the United States (43% of the youngest respondents see China as negative vs. 78% of their elders), but it is also significant in the United Kingdom (48% vs. 79%), Sweden (49% vs. 77%), and France (42% vs. 71%). Except for Türkiye and Poland, all other countries show a gap of between 11 and 21 points between youngest and oldest age groups on this issue.

Positive views of China's influence have declined since 2021. The share of respondents evaluating it as positive has dropped by 8 points in Spain (36% to 28%), by 7 points in Italy (36% to 29%) and Poland (34% to 27%), and by 4 points in Türkiye (34% to 30%). A similar movement can be observed in the Netherlands, albeit from a lower starting level (28% to 22%).

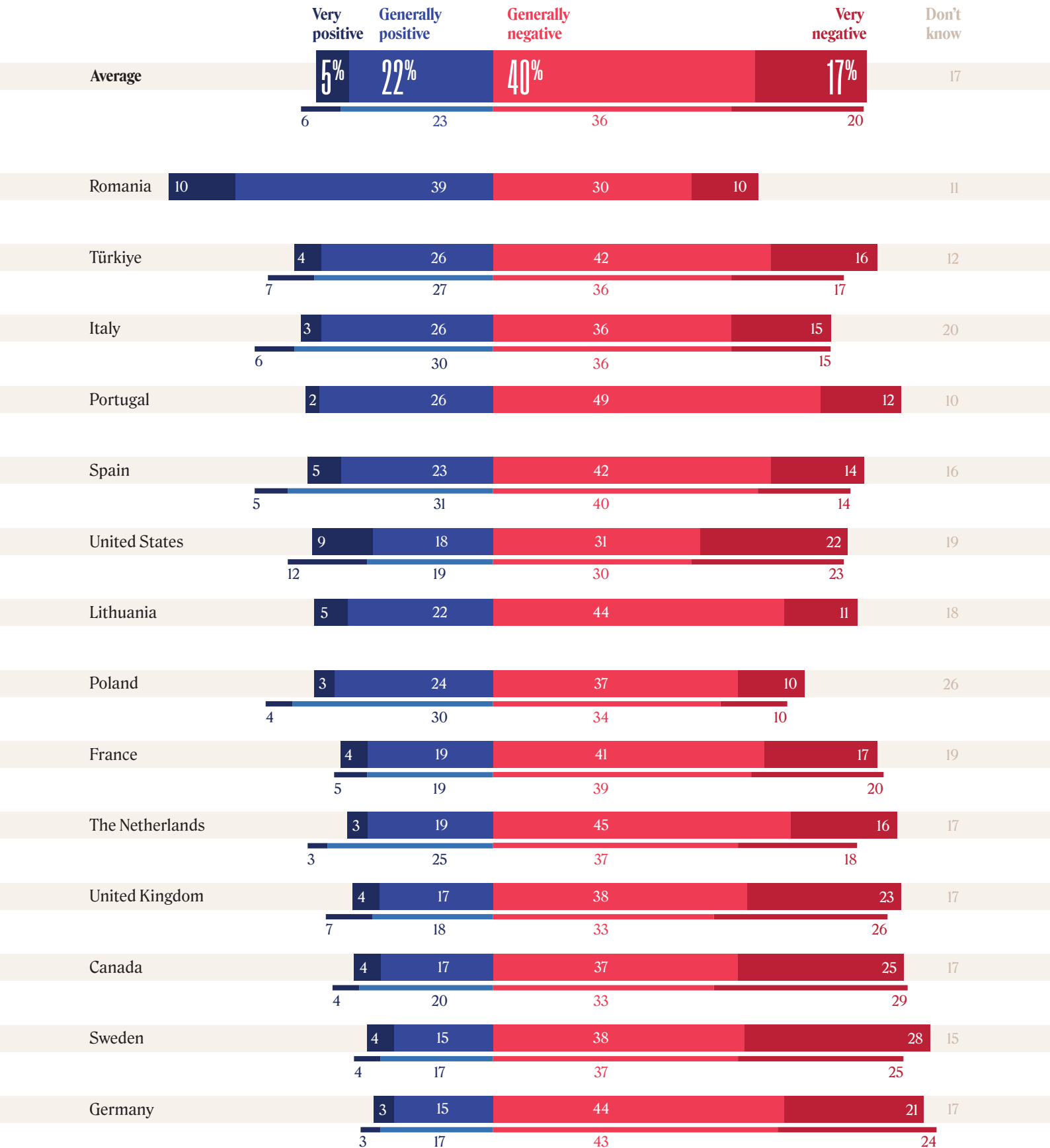
## SPOTLIGHT

The highest degree of political polarization over China's influence is in the United States. While 33% of supporters of the Republicans see China's influence as very negative, only 16% of supporters of the Democrats do so. US respondents also tend to have more strongly pronounced opinions than those in other countries—whether it is very positive views (9% in the United States vs. 5% on average in all countries) or very negative views (22% vs. 17%) of China's influence.

# Sentiment about China's Influence in Global Affairs

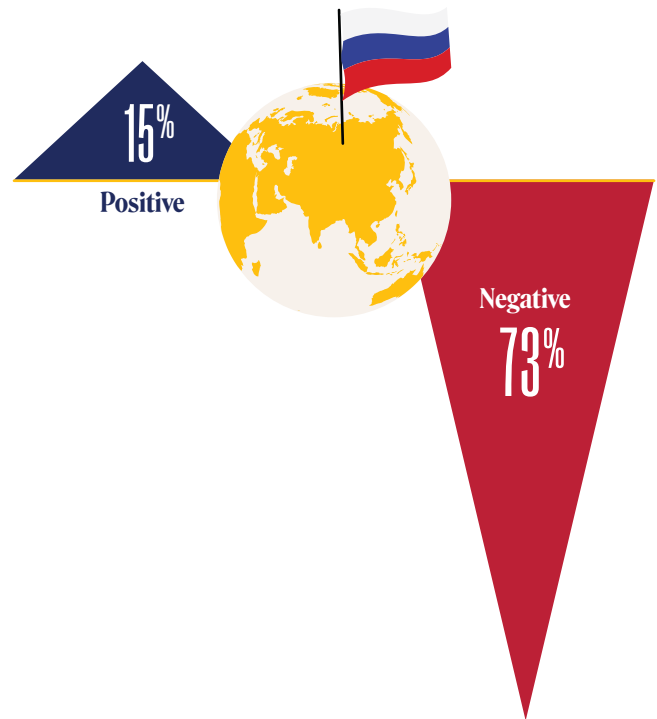
How do you feel about China's influence in global affairs?

■ 2022 — 2021



# Sentiment about Russia's Influence in Global Affairs

Russia's global influence is seen negatively in all countries surveyed, by an average of almost three out of four respondents (73%). In the Netherlands, Poland, and Portugal, this share is four out of five.



The public on both sides of the Atlantic is sharply critical of Russia's influence in global affairs after its invasion of Ukraine. A cross-country average of 73% describe it as very or generally negative. This does not correlate with geographic proximity to Russia: the countries with the highest share of respondents seeing Russia's influence as negative are Portugal (84%) and the Netherlands (81%), followed by Poland (80%), Sweden (78%), Lithuania (77%), the United Kingdom (77%), and Spain (74%). The comparatively least negative perceptions are held by respondents in Türkiye (66%), the United States (65%), Romania (64%), and Italy (62%).

In Europe, supporters of far-right and far-left parties have a more positive assessment of Russia's influence. In France, 26% of supporters of the far-left La France Insoumise describe it as very or generally positive, compared to 16% for all respondents. There is a similar picture in Germany with 30% for supporters of the far-right Alternative for Germany compared to 14% for all respondents. Likewise, Russia's influence is seen as more positive by Italian supporters of the Lega (29%) or of Fratelli d'Italia (27%) than the national average (21%). This is also the case in Spain, where 26% of supporters of Vox judge Russia's influence as positive compared with the national average of 17%.

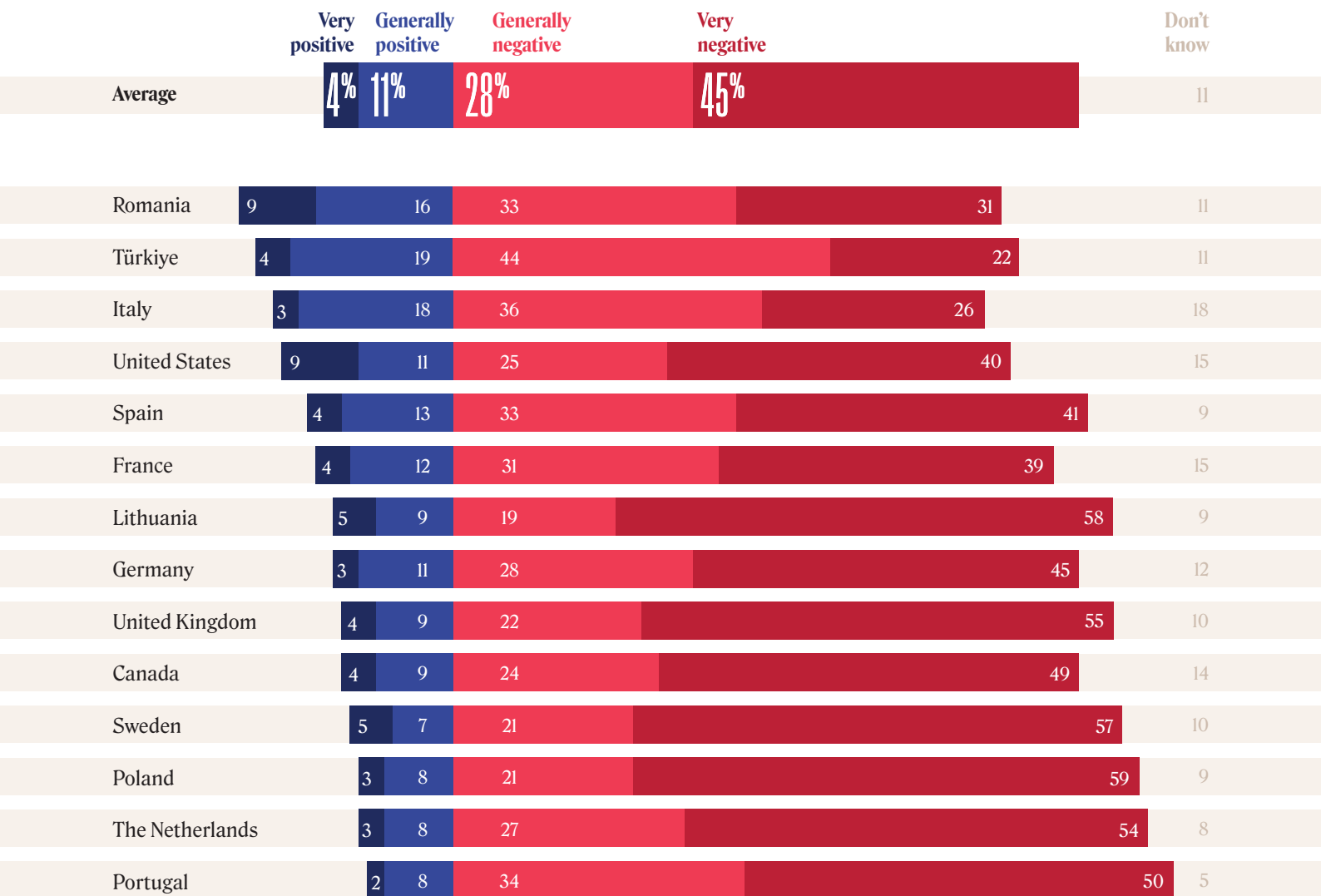
Supporters of some of the governing parties tend to view Russia's influence as more negative than the national average in France (81% for La République en Marche! vs. 70%), Germany (85% of supporters of The Greens, 80% of supporters of the Social Democratic Party vs. the national average of 73%), and the United Kingdom (84% vs. 77%). This is not the case in the United States where supporters of the Democrats hold slightly more positive views (26%) of Russia's influence than does the public as a whole (20%).

## SPOTLIGHT

Nearly all (95%) Dutch respondents aged 65+ describe Russian influence in global affairs as negative—the highest disapproval level across countries.

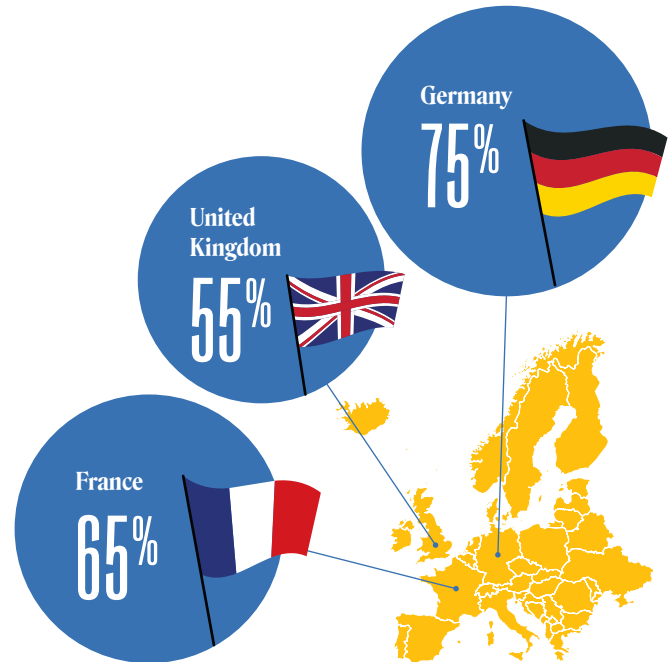
# Sentiment about Russia's Influence in Global Affairs

*How do you feel about Russia's influence in global affairs?*



## Most Influential Countries in Europe

Germany, France, and the United Kingdom are seen as the most influential countries in Europe, very far ahead of all others.



When asked to select the three most influential countries in Europe, 75% of respondents choose Germany, 65% France, and 55% the United Kingdom. Compared to the average across all countries surveyed, respondents in EU member states are even more likely to include Germany (81%) and France (70%) in the three most influential countries and just as likely to choose the United Kingdom (54%).

Overall, the results show a clearly defined picture of influence in Europe, with other countries far behind Germany, France, and the United Kingdom. Italy, which is the nation next most likely to be chosen, is seen to be among the three most influential countries by just 13% of the respondents on both sides of the Atlantic. Smaller shares of respondents name Spain, Türkiye (both 8%), Sweden, and the Netherlands (both 7%) among the top three.

In the United States and Canada, the perception of the influence of Germany, France, and the United Kingdom diverges significantly from that in EU countries. Less than half of respondents in the United States include Germany (44%) and France (41%) among the three most influential countries in Europe. Similarly, Canadians are much less likely than Europeans to include Germany (61%) and France (56%). Another contrast is that respondents in Canada (68%) and the United States (54%) are more likely to include the United Kingdom among the three most influential countries in Europe than they are to include France and Germany.

In most EU member states, the share of respondents including Germany among the three most influential countries is around 10 points higher than the share of those including France. The exceptions where very similar shares of respondents name the two countries are France (82% for Germany and 83% for France) and Portugal (89% and 85%).

In contrast, perceptions of the United Kingdom's influence in Europe vary significantly. While 73% of Portuguese respondents include it among the top three (the highest score for the United Kingdom in the survey) and around two out of three respondents in Lithuania (69%), Spain (64%), and Sweden (63%) do so, respondents in other member states are less likely to do so, namely in France (46%), the Netherlands (44%), and Germany (40%). Similarly, respondents in non-EU member Türkiye (46%) are less likely to see the United Kingdom as very influential. Meanwhile, Poland stands out for having a particularly low inclusion of the United Kingdom (33%). As for British respondents, they are also most likely to choose Germany (68%), the United Kingdom (63%), and France (61%) as the three most influential countries. Türkiye and Poland are less likely to mention France (56% and 50% respectively vs. 65% across all countries).

**SPOTLIGHT** Respondents in European countries are more likely to include their own country among the three most influential in Europe. This is particularly the case in Türkiye (34% vs. 8% average across all countries), Italy (31% vs. 13%), the Netherlands (21% vs. 7%), Spain (19% vs. 8%), and Sweden (18% vs. 7%).

# Most Influential Countries in Europe

Which three of the following countries are the most influential in Europe? Please select three answers

## Country Selected as Most Influential

		Germany	France	United Kingdom	Italy	Spain	Türkiye	The Netherlands	Sweden	Poland	Portugal	Romania	Lithuania
<b>Average</b>		75	65	55	13	8	8	7	7	3	2	2	1
<b>Respondents</b>	Germany	83	72	40	16	7	8	6	6	3	1	1	1
	France	82	83	46	17	11	4	5	3	2	1	1	1
	United Kingdom	68	61	63	9	8	3	5	4	3	2	1	1
	Italy	81	72	51	31	7	5	5	3	1	1	1	
	Spain	83	72	64	8	19	2	7	6	1	1	1	1
	Türkiye	76	56	47	19	7	34	11	11	4	3	5	1
	The Netherlands	76	67	44	9	5	8	21	4	2	1	1	
	Sweden	74	67	63	7	6	9	3	18	3	1	1	1
	Poland	75	50	33	9	4	4	5	5	10	1	1	1
	Portugal	89	85	73	9	10	2	5	4	1	6		
	Romania	84	71	60	11	9	9	7	5	3	1	8	
	Lithuania	78	63	69	8	4	10	3	10	9	1		6
	Canada	61	56	68	9	6	4	4	6	3	1	1	
United States	44	41	54	16	11	5	4	7	3	2	2	1	



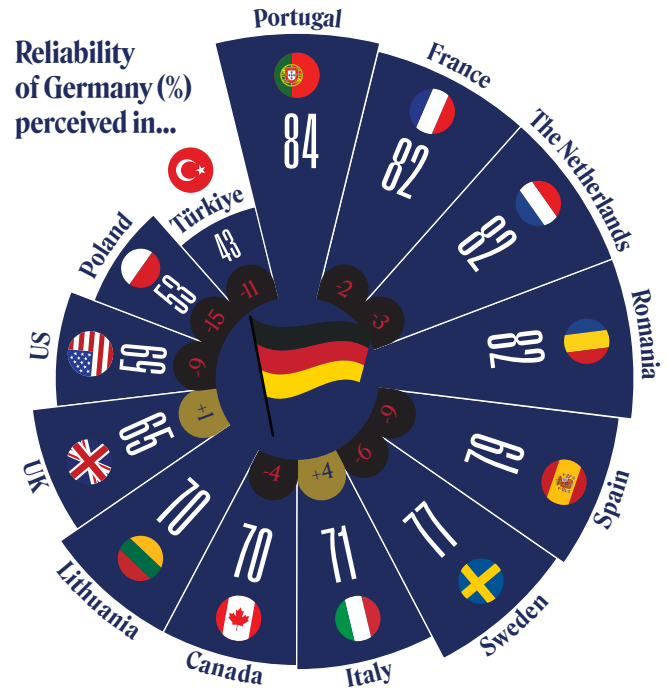
# Transatlantic Relations

## Reliability of Partners

Sweden is perceived as the most reliable partner across all countries surveyed (71%)—with the exception of Türkiye (33%)—followed closely by Canada and Germany (both 70%) in 2022. On average, views of the United States' reliability have slightly increased in the last year, most significantly in Sweden (from 56% to 67%) and Germany (51% to 65%), previously the two EU countries least likely to find the United States to be a reliable partner.

As in 2021, Sweden, Canada, and Germany are seen as the three most reliable partners among the countries covered by the survey. Views of Germany's reliability vary more across countries in Central and Eastern Europe, with high support among Lithuanian (70%) and Romanian (82%) respondents, but lower support among Polish ones (53%).

The United Kingdom is seen as more reliable in Central and Eastern Europe than in Western Europe (aside from Portugal): 81% of Romanians, 78% of Lithuanians, and 75% of Poles find it reliable, compared to 47% of Germans, 49% of French, and 54% of Spaniards. In 2021, Poland was considered the second-least reliable partner (45%) but its stock has risen the most of any country surveyed, up seven points to 52%. Poland and Romania are more likely to see their transatlantic partners as reliable than the other way around. Türkiye is still considered the least reliable partner on average: 27% in 2022, compared to 23% in 2021. The countries with the least positive views of Türkiye's reliability are Sweden (11%), Germany (17%), France (18%), and the Netherlands (19%).



Perceptions of US reliability have increased on average: from 60% in 2021 to 65% in 2022, with the highest scores in Romania (80%) and Poland (79%). However, in Türkiye views of US reliability have dropped to 17% from 23% in 2021. American respondents see the United Kingdom and Canada as the most reliable partners (72% and 71% respectively). When looking to continental Europe, they see France (62%), Italy (61%), and Germany (59%) as the most reliable partners, and 62% see the EU as reliable. Supporters of the Democrats are more likely than supporters of the Republicans to find some European partners reliable (75% of Democrats vs. 61% of Republicans for the EU, 75% vs. 61% for France, and 69% vs. 60% for Germany).

### SPOTLIGHT

Perceptions of Germany's reliability have plummeted in several countries. Respondents are significantly less likely than in 2021 to see Germany as a reliable partner in Poland (53%, -15 points), Türkiye (43%, -11 points), the United States (59%, -9 points), and Spain (79%, -9 points).

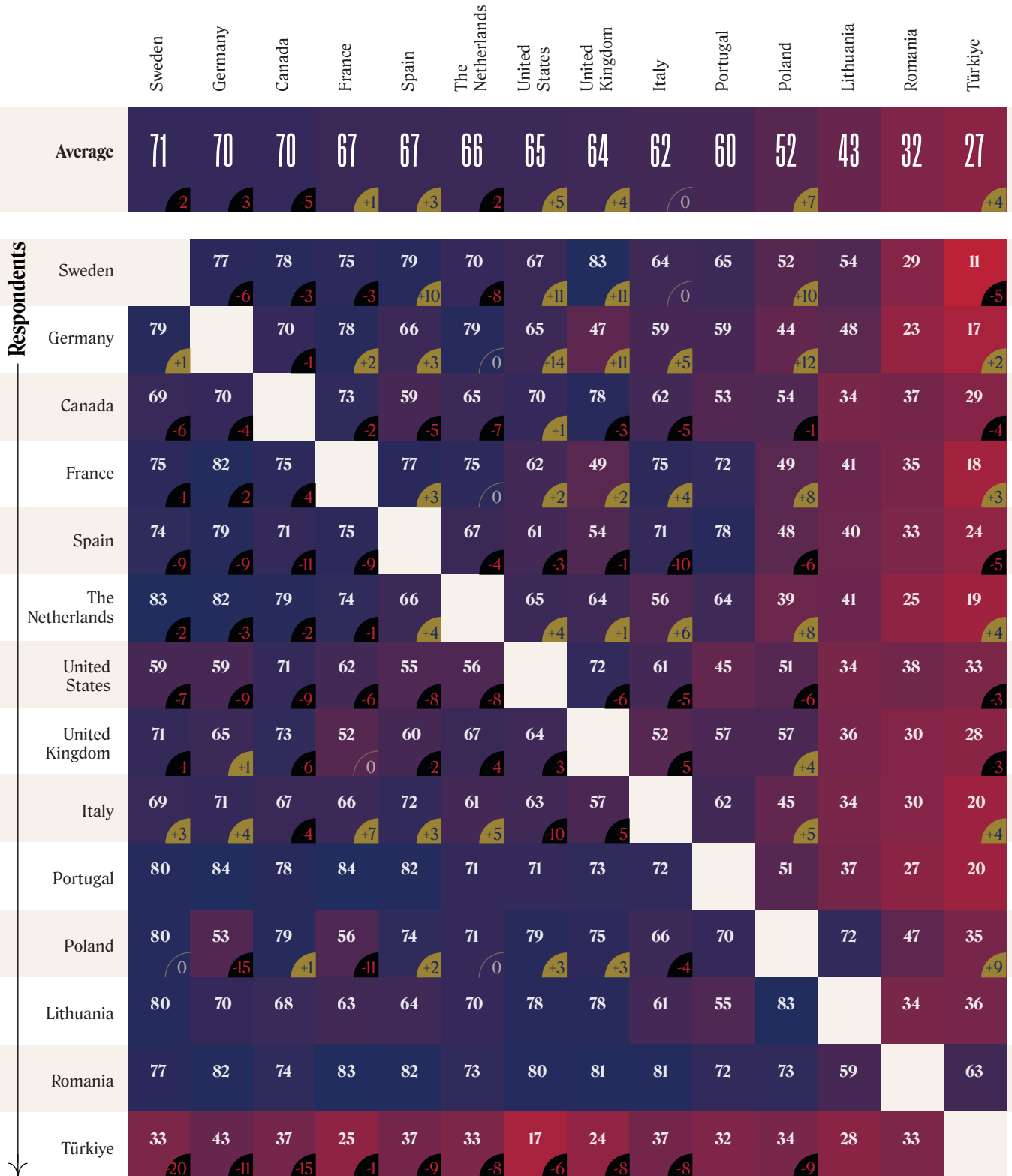


# Reliability of Partners

total, somewhat and very reliable  
(changes from 2021 on the bottom right)

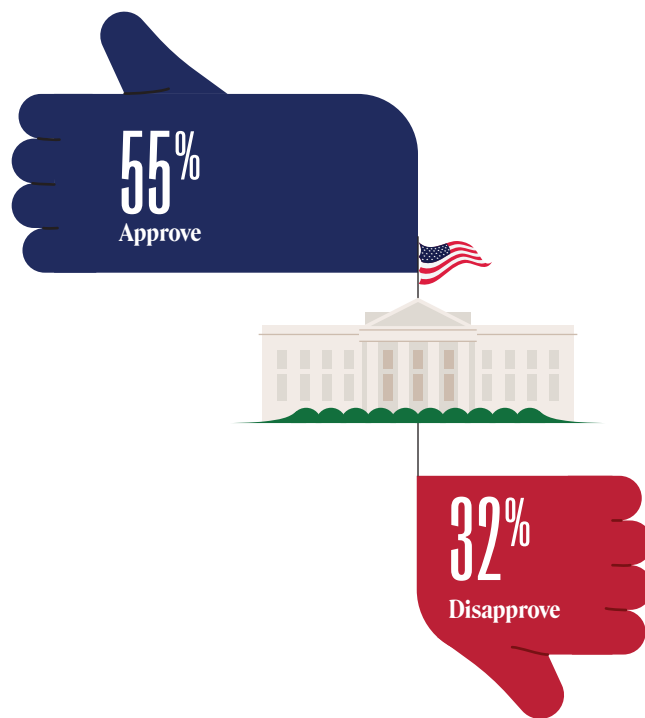
Do you think each of the following countries is a reliable partner for your country?

## Country Selected as Most Reliable



# Approval of US President Biden's Handling of International Affairs

After nearly two years in office, US President Joe Biden's handling of international affairs enjoys overall support within the transatlantic community (55% approval vs. 32% disapproval). American respondents, though, are among the most critical of his foreign policy.



There are variations, with approval highest in Poland (74%), Lithuania (70%), and Romania (66%) and lowest in Türkiye (24%) and Italy (36%). About half of respondents in Spain (50%), France (49%), and the United Kingdom (48%) approve of Biden's handling of international affairs.

Biden's foreign policy is particularly popular in Eastern Europe, where significant shares of respondents say that they "fully approve" of it. Poland has the highest full approval at 43%. Support, full or somewhat, is also strong in Portugal (66%), Germany (64%), and Sweden (64%). Views are more mixed in Spain (50% approve vs. 40% disapprove), France (49% vs. 28%), and the United Kingdom (48% vs. 31%).

Support for Biden's handling of international affairs among American respondents is mixed (47% approve vs. 44% disapprove). Those with negative views are more likely to "fully disapprove" than to "somewhat disapprove" (28% vs. 16%).

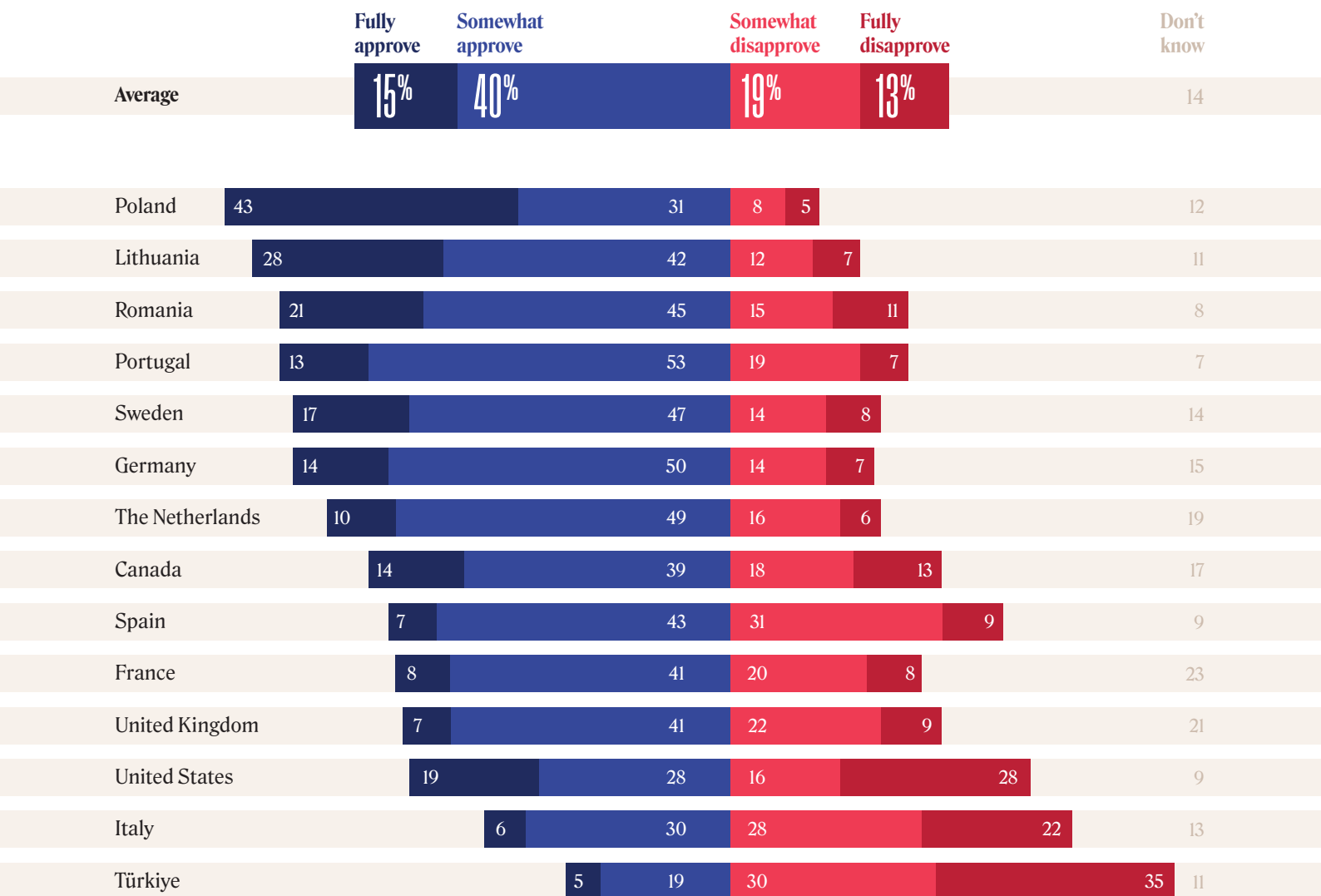
American respondents' views are divided along political, generational, educational, and employment lines. Three-quarters (76%) of Democrats approve of Biden's foreign policy compared to only 25% of Republicans. Support increases with higher levels of education and employment. Respondents with a high level of education (64%) are more likely than those with a low one (38%) to approve. So are those in full-time employment (55%) compared to the unemployed (36%).

## SPOTLIGHT

Support for Biden's foreign policy is lower among younger respondents. Noticeable generational divides include a 23-point difference in the Netherlands (51% of the youngest vs. 74% of the oldest respondents), a 22-point difference in Germany (53% vs. 75%), and a 19-point difference in Canada (43% vs. 62%).

# Approval of US President Biden's Handling of International Affairs

*Do you approve or disapprove of the way US President Joe Biden is handling international affairs?*



# Future of US-European Relations

Against the backdrop of Russia's invasion of Ukraine, most respondents say that relations between the United States and Europe will remain stable in the coming five years, and more than a quarter that they will get closer.

Respondents in EU countries tend to be relatively more optimistic than those in non-EU ones: 30% of those in EU member states predict a strengthening of the relationship while 22% of US respondents share this view. In Türkiye 22% of respondents predict closer relationships, as do 20% of respondents in Canada and 14% of respondents in the United Kingdom. Divergence is viewed as unlikely, with only 11% of respondents in EU member states and 17% of respondents in the United States thinking that relations will become more distant.

There is no pattern of geographical divisions in views of future transatlantic relations: Portugal (46%), Romania (41%), and Lithuania (38%) have the highest predictions that relations will improve. Male respondents are more likely than female ones to say the relationship will get closer: 34% vs. 23% in Sweden, 26% vs. 14% in Canada, and 25% vs. 14% in the Netherlands.

Among American respondents, 26% of Republican supporters and 18% of independents say that Europe and the United States will become more distant. On the other hand, a third (33%) of Democratic supporters predict a deepening of relations compared to 17% of Republican ones.

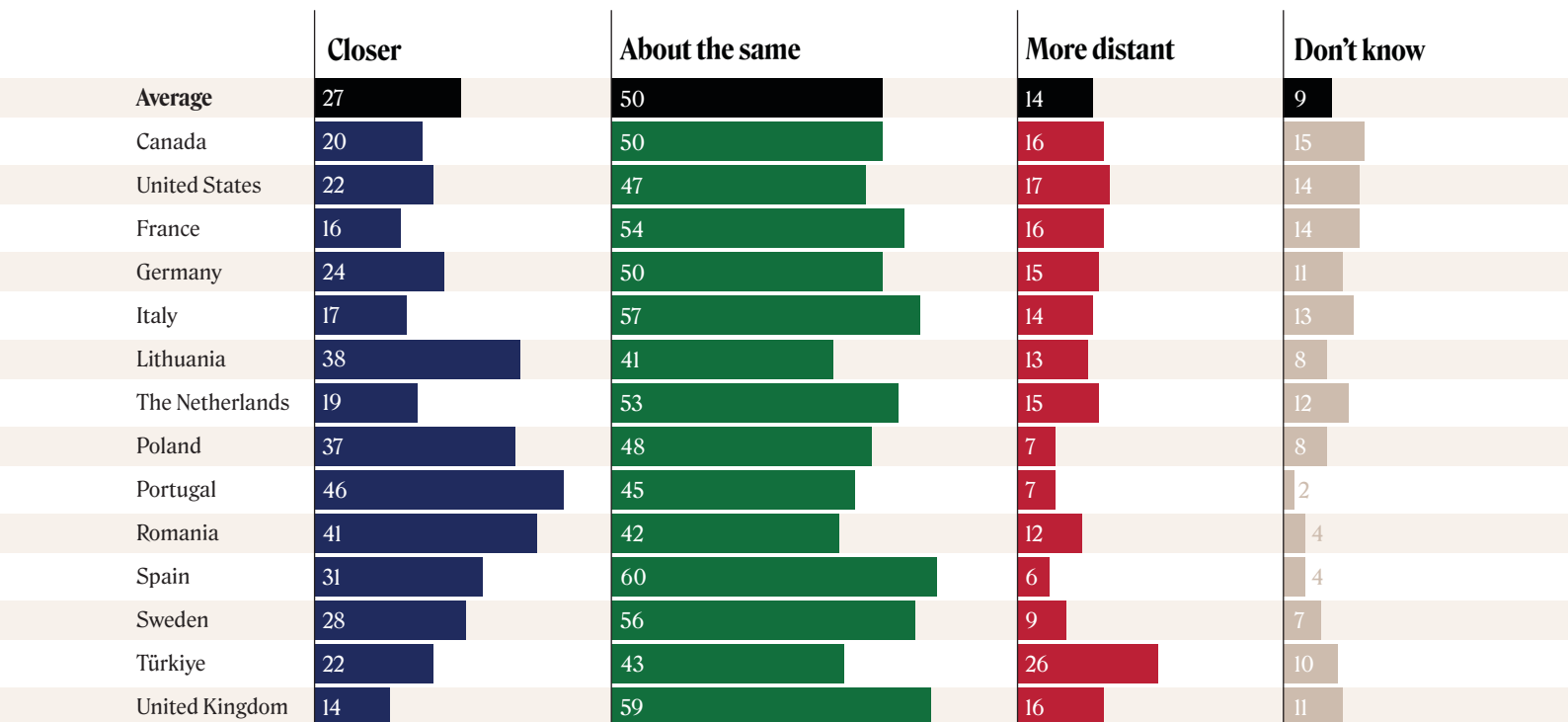
## SPOTLIGHT

Predictions of weaker ties are highest among traditionally close allies to the United States. Respondents in Canada, France, and the United Kingdom (all 16%) are likelier than average respondents to predict a deterioration, as are American respondents (17%).



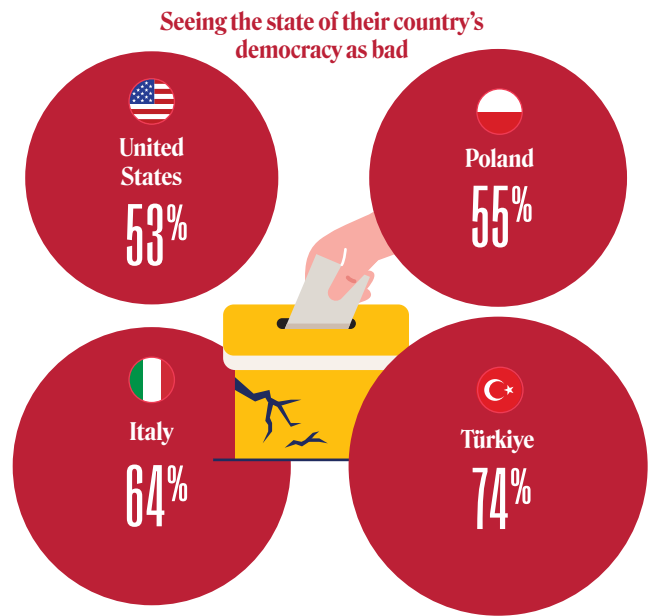
## Future of US-European Relations

*In five years, do you anticipate relations between the United States and Europe to be...*



## State of Democracy

Within the transatlantic community, respondents' appraisal of the state of democracy in their country has dropped on average from 55% in 2021 to 50% in 2022. Swedish (72%) and Canadian (65%) respondents are still the most satisfied with their democracy, while Polish (36%), Italian (31%), and Turkish (21%) ones remain the least satisfied.



Amid global democratic backsliding, respondents' perceptions of the state of their country's democracy fell slightly in 2022, to the point where just 50% of them have a positive view. Canada, Sweden, and the United Kingdom saw the most satisfaction with democracy in 2021, but this assessment has declined. Most notably, satisfaction in the United Kingdom fell from 70% in 2021 to 51% in 2022. There were other notable decreases in Canada (76% to 65%), the Netherlands (64% to 50%), and the United States (55% to 38%). American respondents who feel negatively about the state of US democracy are more likely to believe it is in danger than just somewhat bad (30% vs. 23%).

In Italy (31%) and Poland (36%), views about the state of democracy are largely unchanged from 2021, whereas in Türkiye they have deteriorated sharply. The share of Turkish respondents saying their democracy is in a good state decreased from 35% to 21%, while 46% say democracy is in danger (an increase of 7 points from 39% in 2021).

In most countries, supporters of far-right parties have the least positive perceptions about the state of their country's democracy. This is the case among supporters of the Swedish Democrats (48% vs. 72% on average), of VOX in Spain

(33% vs. 55%), of the Party for Freedom in the Netherlands (30% vs. 50%), of the National Rally in France (30% vs. 47%), and—in the most extreme case—of Alternative for Germany (18% vs. 57%). However, in Poland, where the Law and Justice party leads the government, 82% of respondents supporting it are satisfied with the state of democracy, compared to 17% of those supporting the opposition Civic Platform.

In the United Kingdom, 74% of respondents supporting the Conservative Party say they are happy with the state of democracy, compared with 53% of those supporting Labour. In Italy, 55% of supporters of the centrist Democratic Party are satisfied with the state of their democracy, whereas only 21% of supporters of the right-wing Fratelli d'Italia and 26% of those of the Five Star Movement (26%) share this view.

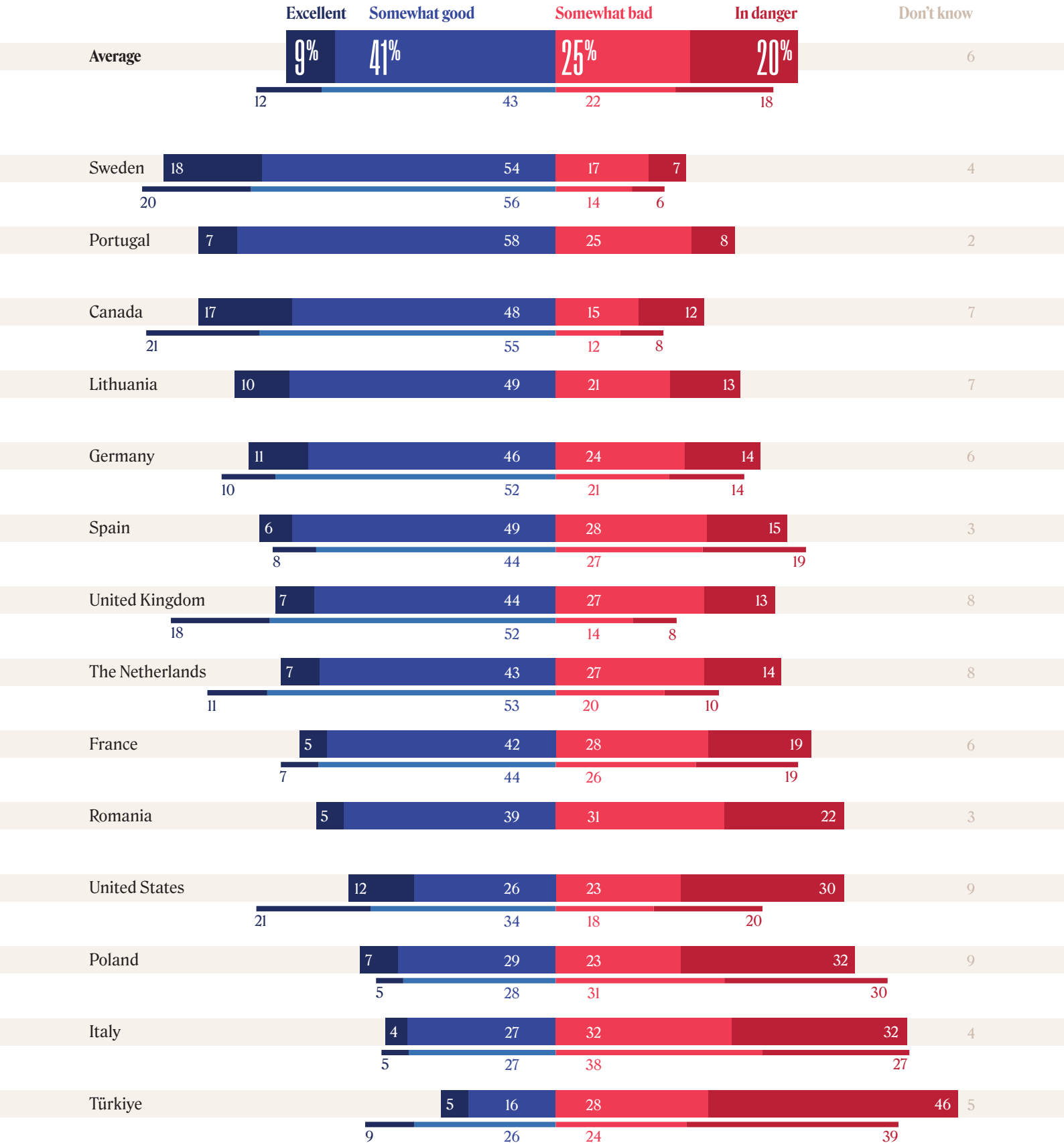
### SPOTLIGHT

American respondents are especially divided along party lines, with 53% of supporters of the Democrats saying US democracy is in good shape compared to 33% of supporters of Republicans. Conversely, 63% of Republicans say it is in a bad state, with 37% saying it is in danger.

# State of Democracy

How do you perceive the state of democracy in your country?

■ 2022 — 2021



## Cooperation on Global Challenges

A slight majority of respondents say their country should only cooperate with democracies on global challenges (53%), compared to 30% who have no preference as to whether their partners should be democratic. Respondents in Portugal (67%) and Sweden (66%) are particularly in favor of cooperating with democracies, while those in the United States and the United Kingdom are more split on the matter: 42% of the British and 38% of Americans favor partnering with democracies, while 36% in both countries do not have a preference.

As the liberal democratic order continues to be confronted by the global rise of authoritarianism, respondents in all countries slightly or heavily favor working only with democracies. The highest support is in Portugal (67%) and Sweden (66%). Respondents in Spain (62%), Poland (62%), Lithuania (61%), Italy (56%), and France (54%) also clearly favor working with democracies. Slightly less than half of those in Romania (49%), Germany (47%), the Netherlands (46%), and Canada (45%) prefer democratic partners.

More Turkish respondents favor working with democracies (52%) than do American, British, Canadian, Dutch, German, and Romanian ones. Notably, between one-fifth and a quarter of American, British, Canadian, Dutch, French, and Italian respondents are undecided on the matter.

In Europe, working only with democracies is less of a priority for supporters of some far-right parties including the National Rally in France (48%), the Party for Freedom in the Netherlands (39%), and Alternative for Germany (30%). In Italy, while 75% of Democratic Party supporters say the country should only partner with democracies, fewer supporters of the Five Star Movement (24%), Fratelli d'Italia, and Lega (both 29%) agree. Between 25% and 30% of supporters of these three parties say it does not matter whether partners are democracies, compared with just 17% of Democratic Party voters.



State their country should only cooperate with democracies

### SPOTLIGHT

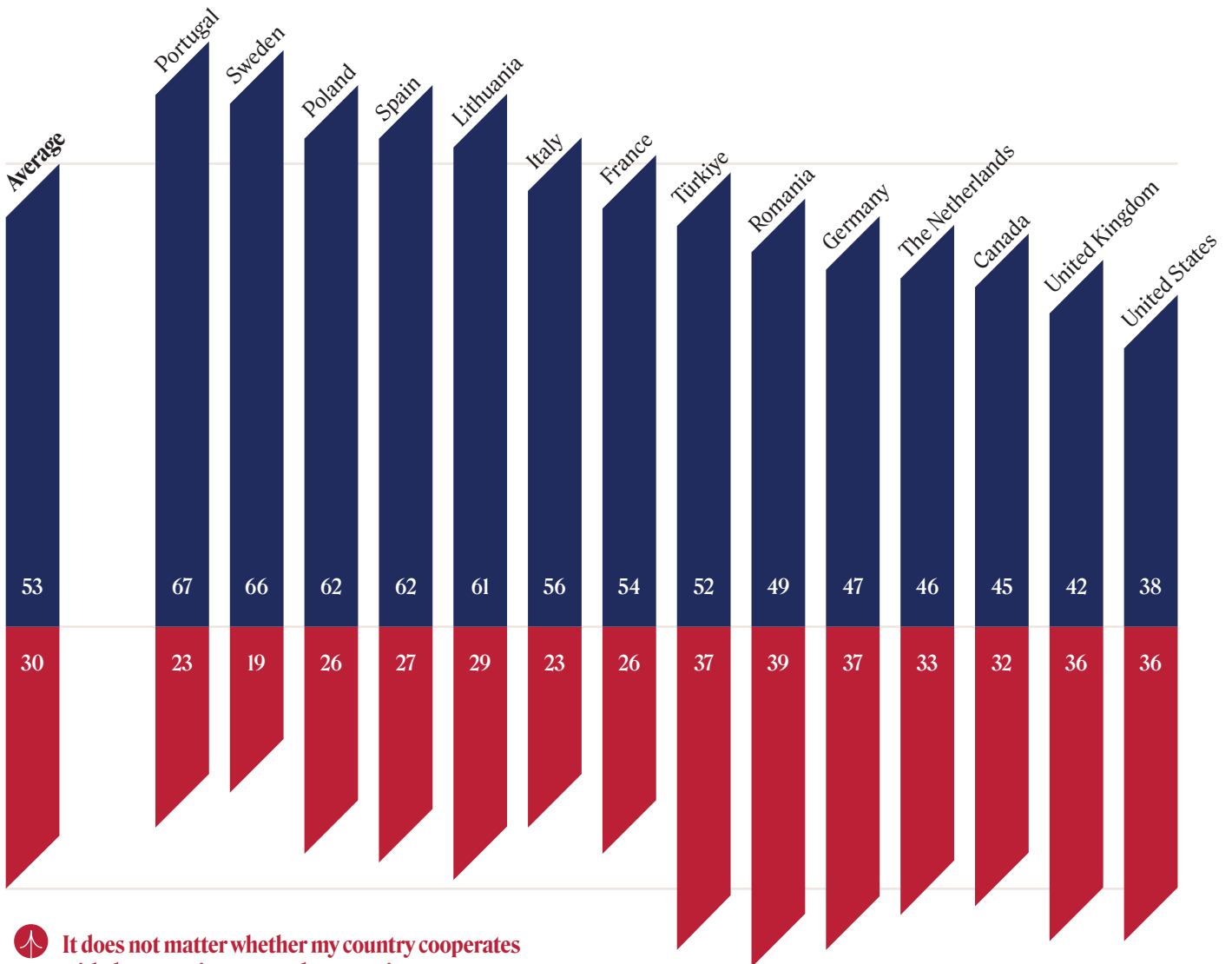
While there is largely a consensus across age groups in almost all countries surveyed, there is a generational gap in Germany with 62% of those aged 18–24 favoring cooperation only with democracies. Older respondents (49% of those 65+) place less importance on working with democratic partners.



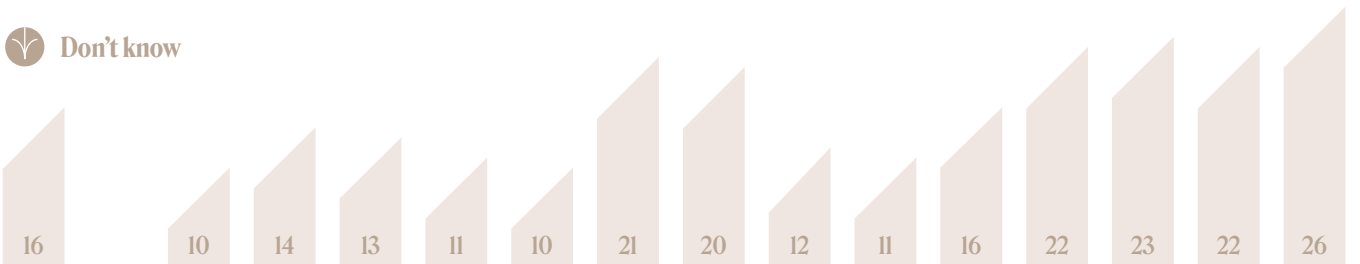
# Cooperation on Global Challenges

When it comes to addressing global challenges, which option comes closer to your view?

## My country should only cooperate with democracies

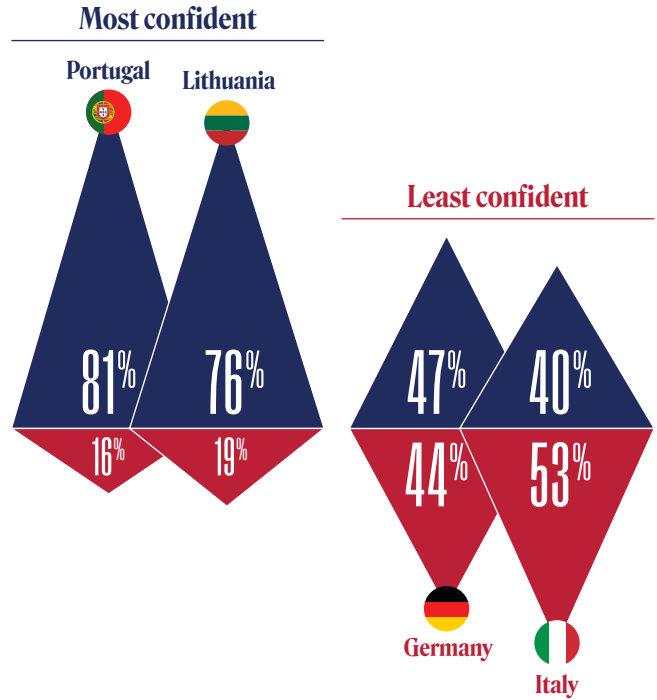


## It does not matter whether my country cooperates with democracies or non-democracies



# Capacity of Country to Keep Pace with Technological Developments and Innovation

In some countries, respondents are overwhelmingly confident about their ability to keep up in the field of technology, while others have a much more pessimistic assessment of their prospects.



Respondents in Portugal (81%), Lithuania (76%), and Sweden (70%) are the most positive about their country’s ability to somewhat or fully keep pace with technological innovation, followed by those in the United Kingdom and the United States (both 66%) and Canada (62%). In France (52%), Spain (51%), and Germany (47%), around half of respondents share this view. The share of respondents who are fully convinced that their country is keeping pace with technological developments and innovation is highest in the United States (28%), Sweden (27%), and Türkiye (25%). In Italy, a narrow majority (53%) consider that their country is not keeping pace.

There is a generational gap on this question, including in the optimistic countries, with older respondents more positive about their country’s technological prowess. In the United Kingdom, 71% of those aged 65+ say the country is keeping pace, compared with 57% of those aged 18–24. Similarly, 85% of Portuguese and 84% of Lithuanians aged 55+ are more upbeat than those aged 18–24 (74% of Portuguese and 66% of Lithuanians).

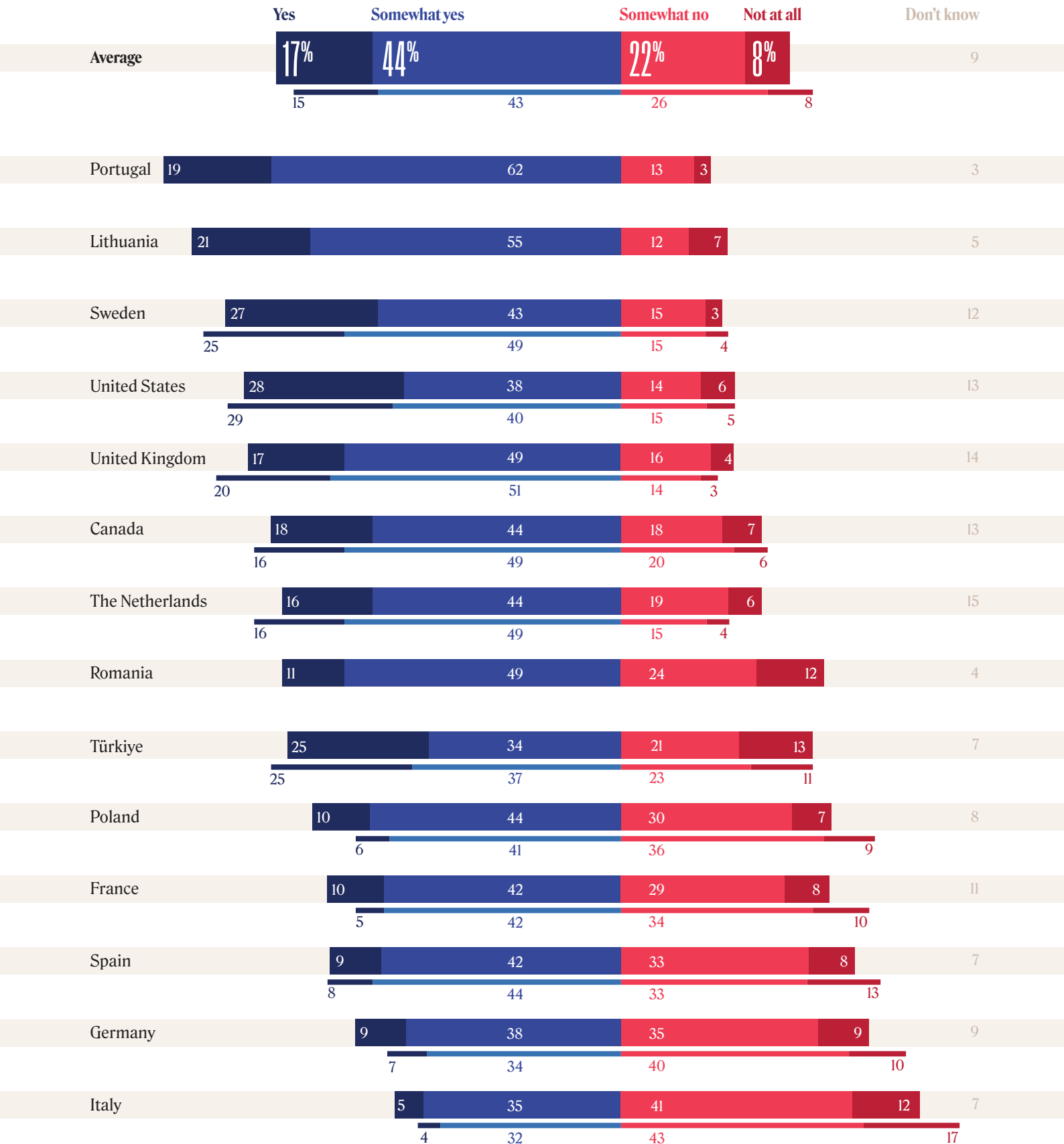
**SPOTLIGHT**

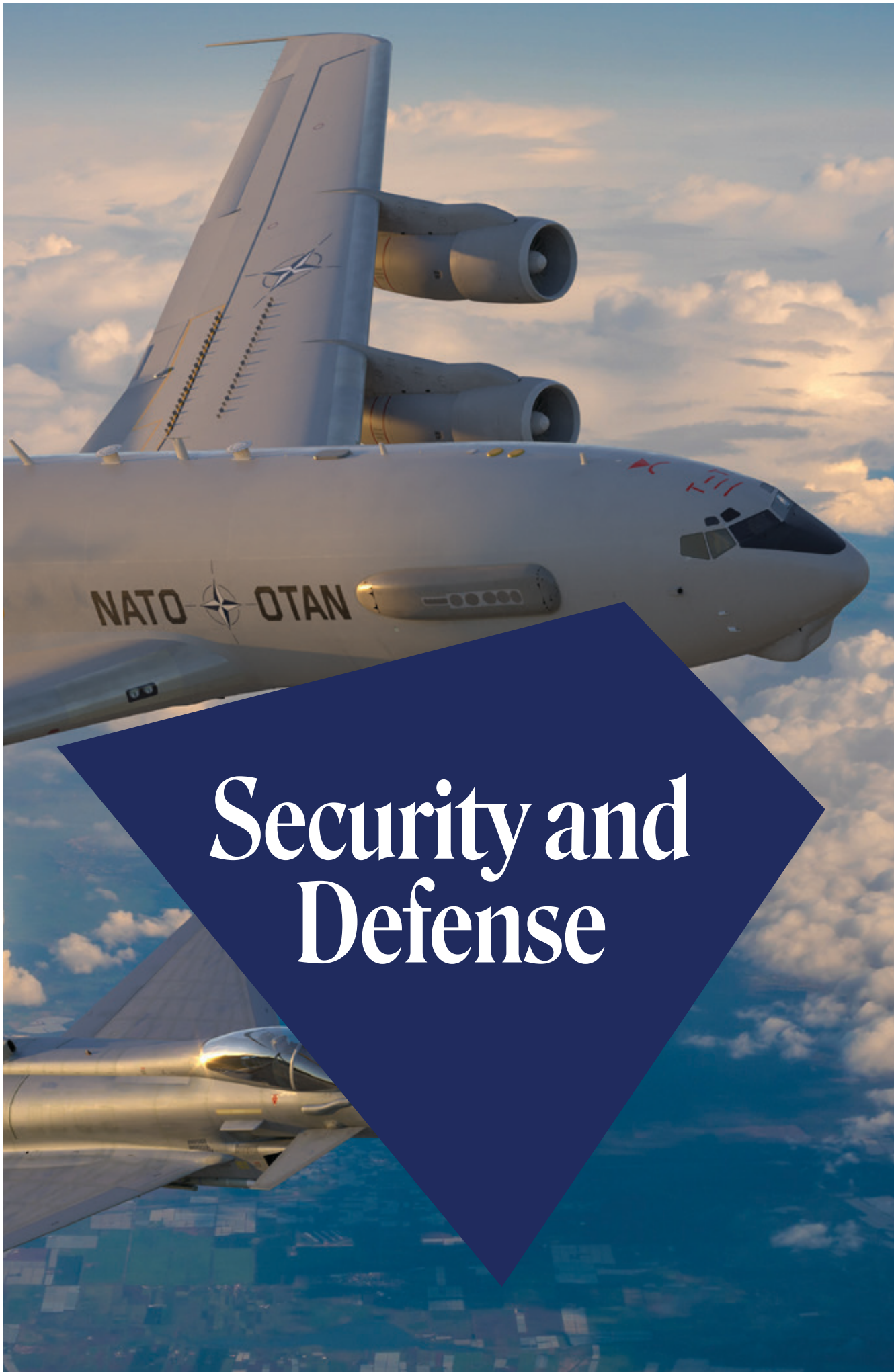
In Germany, there is a regional divide in perceptions of the country’s ability to keep up in technology. Respondents in the east are more likely to be pessimistic, with 53% saying that the country is not capable of doing so, while 40% of respondents in the south and 42% in the west are less downbeat.

# Capacity of Country to Keep Pace with Technological Developments and Innovation

Do you think your country is keeping pace with technological developments and innovations?

■ 2022 — 2021

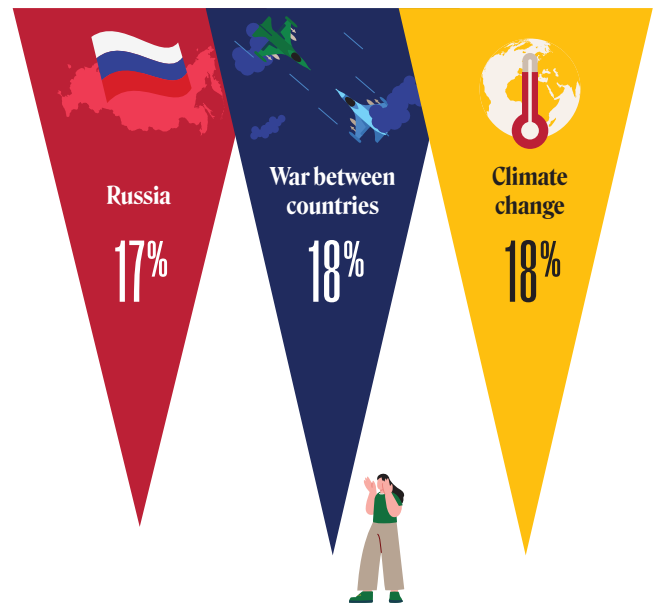




# Security and Defense

## Most Important Security Challenge

In 2022, climate change, war between countries, and Russia are the top security challenges for transatlantic publics, although their ranking varies between countries. Immigration is a lesser concern, while pandemics, which ranked first in 2021 in a different list of options, have become a marginal concern despite the ongoing coronavirus crisis.



Climate change is seen as the top security challenge in Italy (34%), France (28%), and Canada (24%). In Portugal and Spain, where a plurality of respondents also consider climate change as the most important challenge, Russia and the risk of war between countries rank very high as well. In Portugal, while 29% of the people see climate change as the top challenge, 23% cite war between countries and 10% cite Russia. Similarly, 22% of Spaniards are primarily concerned about climate change, but 19% are first concerned about war, and 11% about Russia. Taken together, the concerns stemming from the Russian invasion of Ukraine are thus prioritized by 33% of Portuguese respondents and 30% of Spanish ones, above climate change. American respondents are more evenly concerned about different challenges: climate change (14%), war (13%), immigration (11%), and Russia (10%).

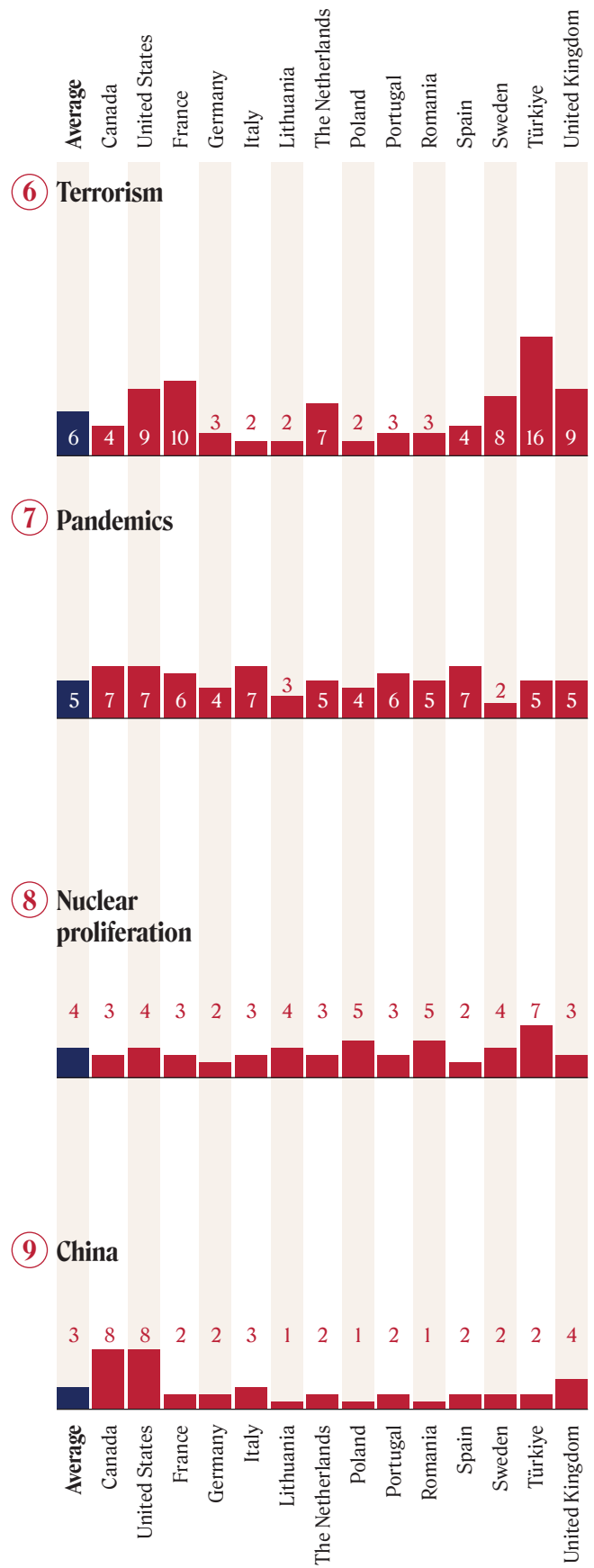
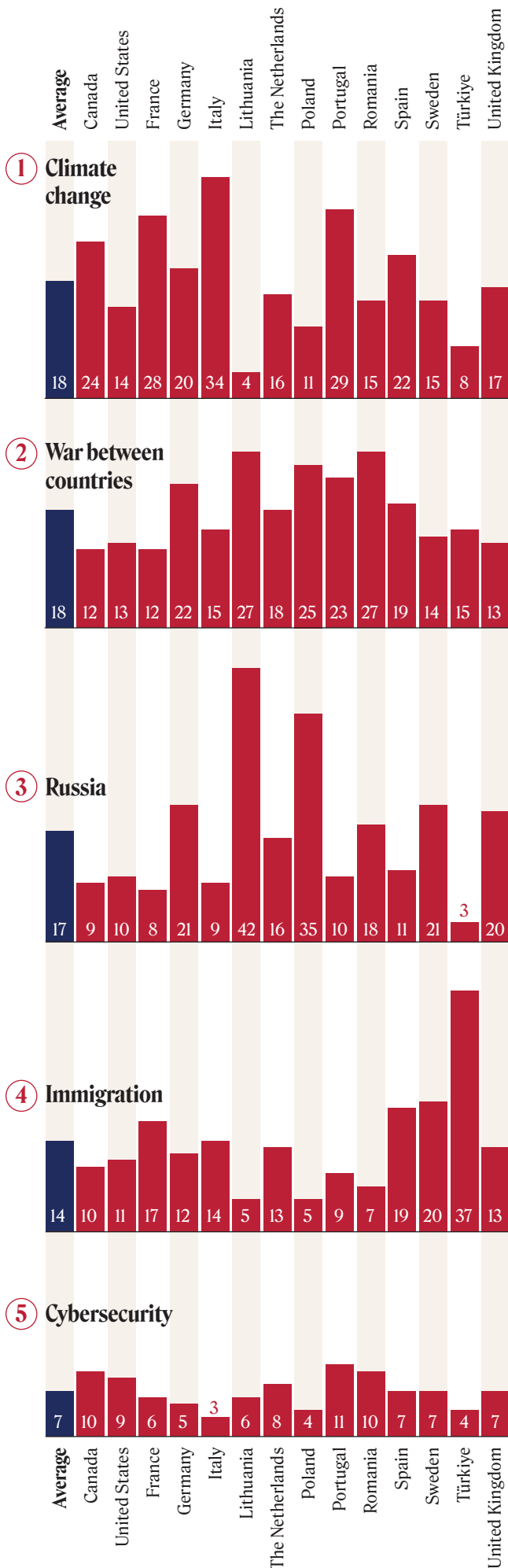
Respondents in countries nearer Ukraine are more concerned about the security challenge from Russia and interstate war: 21% about Russia and 22% about war in Germany, 35% and 25% respectively in Poland, and 18% and 27% respectively in Romania.

Respondents in Türkiye have very different security concerns than those in the other countries surveyed. Immigration is the top challenge for 37% of them, followed by terrorism (16%) and interstate war (15%). Turks are also more concerned about nuclear proliferation, with 17% citing it as either the first or second most significant security challenge. By comparison, climate change is seen as a challenge for 8% of respondents and Russia for 3%.

### SPOTLIGHT

The highest shares of respondents ranking immigration as the first or second most important security challenge can be found in Türkiye (55%), Spain (31%), France, and Sweden (both 29%). In the latter cases, respondents aged 18–24 see it only as a marginal issue, whereas the older French and Swedish respondents are more concerned (22% vs. 29% respectively).

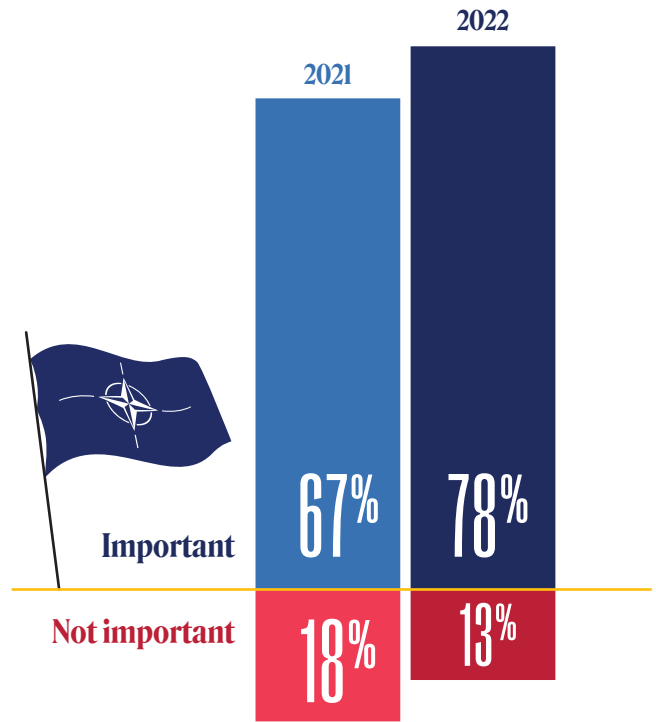
# Most Important Security Challenge



What is the most important security challenge for your country to address in the years to come?

# Importance of NATO

The share of respondents saying that NATO plays an important role in the security of their country is 78%, an increase of 11 points from 2021.



Since last year, NATO’s importance has greatly increased in the eyes of the public. Almost half of the respondents (46% on average across countries) even see NATO as “very important,” which represents a leap by 20 points compared to 2021.

Respondents in European “frontline countries”—that is, nearer Russia and Ukraine—place a particularly high value on NATO: 91% of Poles, 88% of Romanians, and 87% of Lithuanians see it as somewhat important or very important. In Poland, there has been a 23-point increase since 2021 in the share of respondents considering NATO as very important (66%). In Western Europe, Portugal (65%), Germany (53%), and the Netherlands (52%) also rank NATO as very important, with a 30-point leap in Germany.

Even countries that traditionally perceive NATO as less important for their security, such as France and Spain, show the same evolution: 72% of French respondents (vs. 52% in 2021) and 77% of Spanish ones (vs. 65%) consider the defense alliance as somewhat or very important. In Sweden, 34% of respondents see NATO as very important, up from 18% the previous year. In Türkiye, where there is the smallest majority seeing NATO as important (65%), there has been a 4-point decrease.

There is a significant generational gap in perceptions of NATO in some countries, with younger respondents generally less convinced of its importance. Almost two-thirds (65%) of Germans aged 18–24 compared to 87% of those aged 65+ say that NATO plays a somewhat or very important role in their country’s security. There are similarly significant generational gaps in the United Kingdom (26 points) and the Netherlands (28 points). Türkiye is an exception, with older respondents slightly more skeptical toward NATO: 29% of those aged 55+ do not consider it important compared to 20% of those aged 18–24.

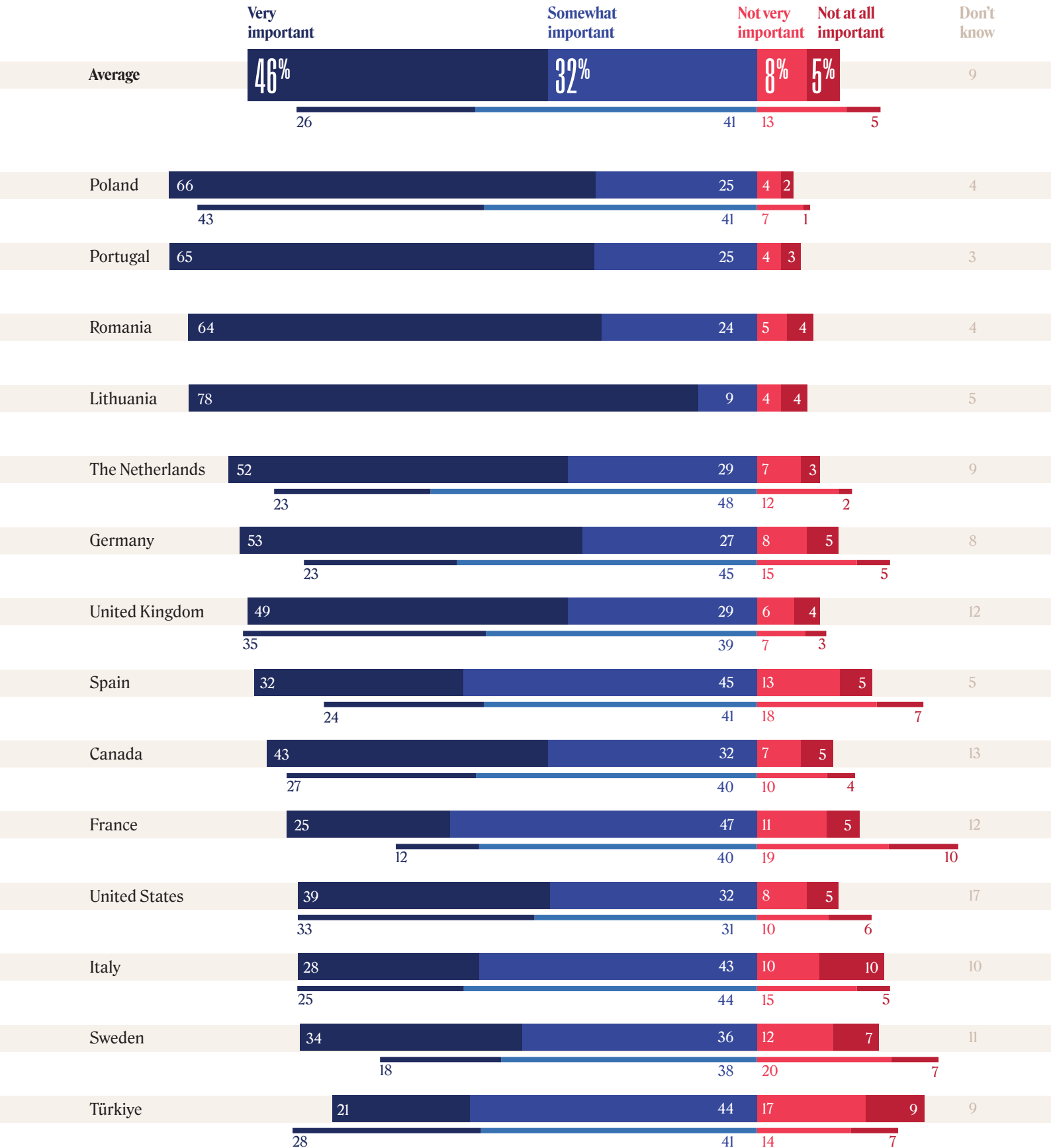
**SPOTLIGHT**

In the United States, while 71% of respondents see NATO as important (up from 64% in 2021), party affiliation is the most significant determinant, with supporters of the Democrats (86%) more likely to value the alliance than do supporters of the Republicans (70%) or independents (65%).

# Importance of NATO

How important is NATO in the security of your country?

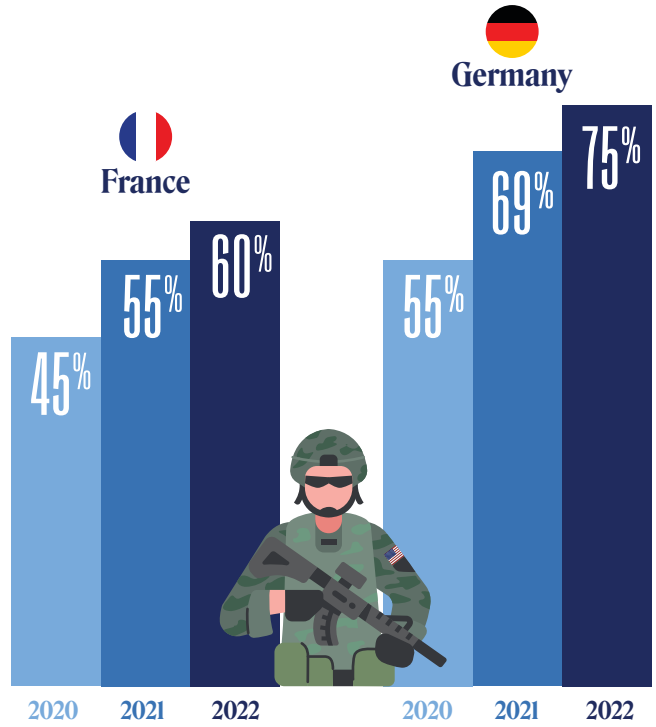
■ 2022 — 2021





# US Involvement in the Defense and Security of Europe

The desire for US involvement in the defense of Europe has generally increased in the wake of Russia’s invasion of Ukraine. An overwhelming majority across the countries surveyed (72%) want the United States somewhat or very involved, while 19% would rather it keep out. The increase is greatest in Sweden (72% in 2022 vs. 45% in 2021), but there are also noteworthy increases in Spain (71% vs. 60%) and the Netherlands (75% vs. 66%).



The countries that are the most positive about NATO’s role in their security also top the ranking on US involvement in European defense. Poles (88%), Lithuanians (86%), Portuguese (85%), and Romanians (84%) overwhelmingly want to see the United States somewhat or very involved. On the other end of the spectrum, just 38% of Turks back a US role in European security, although this is an increase from 31% in 2021.

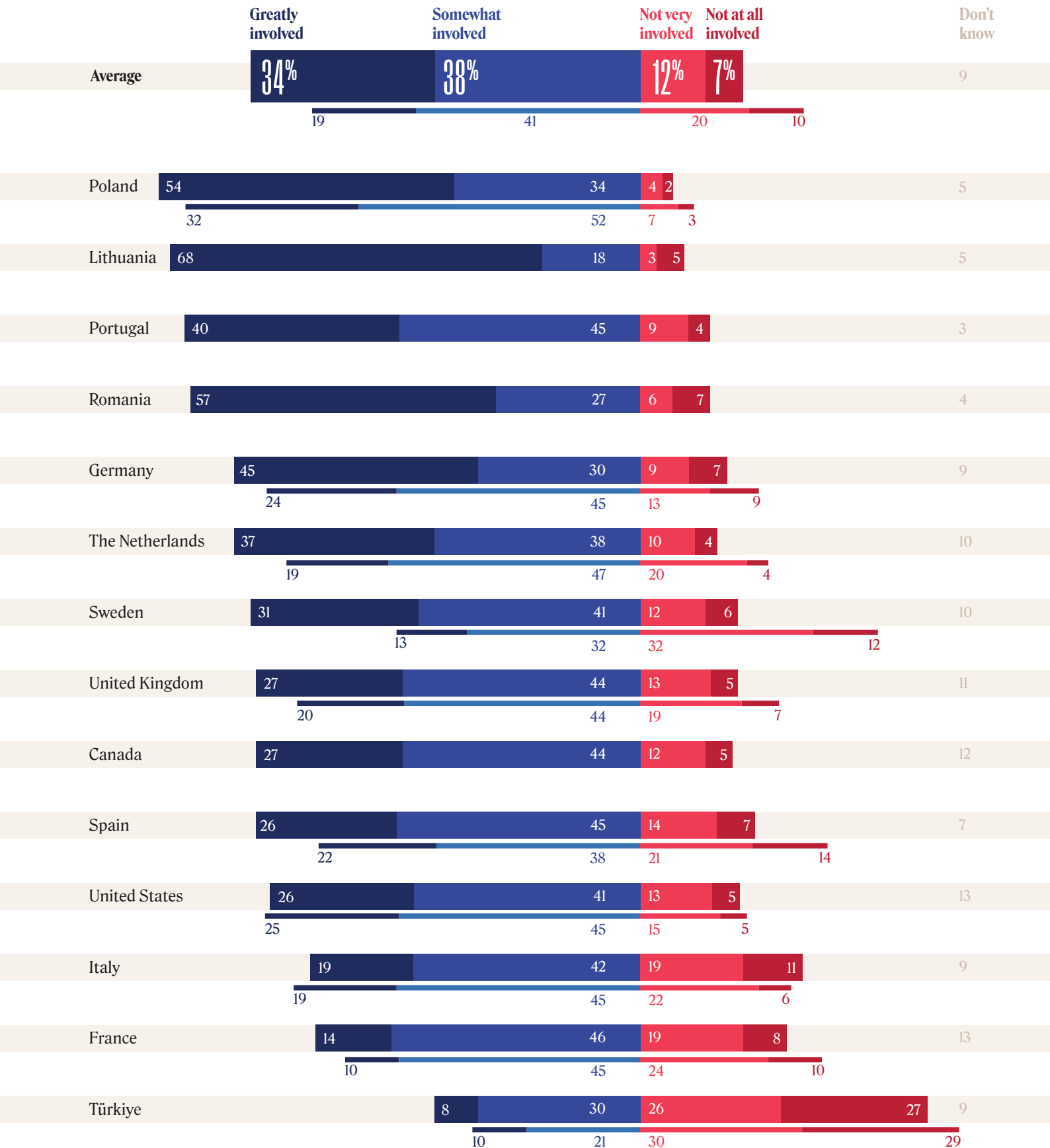
In France, where there is an increase in support of 5 points, there are sharp partisan differences in views of the US security role in Europe. While 77% of supporters of President Emmanuel Macron’s La République En Marche! party favor US involvement, just 59% of the main far-left party, La France Insoumise, and 58% of the far-right National Rally do so. In Germany, supporters of the government coalition are united behind US involvement: 90% of respondents from the Social Democratic Party, 84% from the Free Democratic Party, and 83% from The Greens.

**SPOTLIGHT** In the United States, opinion about the country’s role in European security remains broadly solid, though with strong generational and partisan divides. When it comes to this, 82% of Democratic respondents want to see the United States involved (with 37% saying greatly involved) while 68% of the Republican respondents and 63% of independents do so. Older Americans are for greater US involvement (75% of those aged 55+) while a smaller majority of those aged 18–24 (63%) agree.

# US Involvement in the Defense and Security of Europe

How involved should the United States be in the defense and security of Europe?

■ 2022 — 2021



# Importance of the EU for National Security

A majority of respondents in the EU member states surveyed as well as in the United Kingdom and Türkiye<sup>1</sup> consider the EU as important for their country's national security.



of respondents in EU member states see the EU as important for the national security of their country

An average of 81% in member states see the EU as important for the national security of their country, a number just as high as the share of respondents considering NATO important in this context (see question 15).

In particular, respondents from Southern and Eastern European countries consider the EU as important for their national security. This is the case for 94% of respondents in Portugal and 82% in Spain, as well as for 88% in Romania, 87% in Lithuania, and 85% in Poland.

While respondents in the Netherlands (77%), Sweden (76%), Germany (75%), Italy (75%), and France (73%) see the EU as important for their national security, this is slightly below the average across all EU countries (81%) surveyed. Majorities in the United Kingdom (67%) and Türkiye (58%)—both EU non-members—also describe the EU as important for national security.

The perception of the EU's role in national security often correlates with age, with the oldest age group in most countries surveyed perceiving the EU as more important than the 18-24 age group. The biggest generational gap (18 points)

is in the Netherlands (86% vs. 68%). There are also large such gaps in Germany (81% vs. 68%) and Lithuania (93% vs. 83%). The reverse is true in Türkiye with younger respondents more likely to consider the EU as important for national security (66%) than older ones (59%).

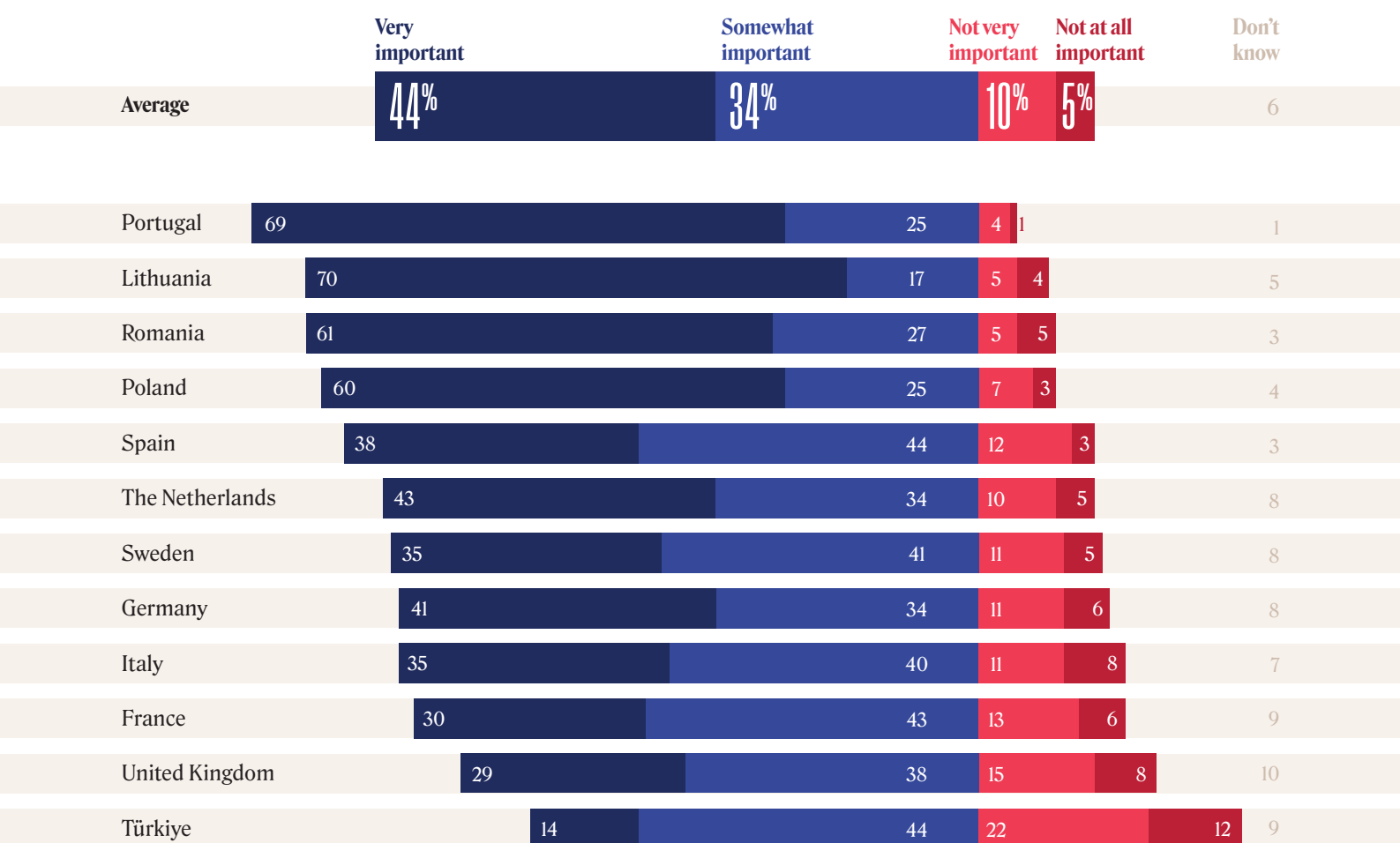
## SPOTLIGHT

Six years after the Brexit referendum, 67% of British respondents consider the EU important for their national security, a view evenly distributed across age, income, and region variables. Among supporters of the Conservative Party, the share of those considering the EU as important for the United Kingdom's security aligns with the national average (67%), whereas the EU is seen as more important by supporters of the Labour (81%) or the Liberal Democrats (70%).

<sup>1</sup> The question was not asked in Canada and the United States.

## Importance of the EU for National Security

How important is the European Union for the national security of your country?



# Managing Relations with Russia and China

Respondents across the European countries surveyed say that working through the EU is their preferred way to manage relations with Russia and China, rather than cooperation with the United States.

Work with the United States to manage relations with...



## Managing Relations with Russia

A plurality of respondents in almost all the EU countries surveyed say that relations with Russia would be best managed through the EU. This includes 53% of Portuguese, 48% of Spaniards, 44% of Italians, 37% of Swedish, 36% of French, 33% of Germans, 32% of Lithuanians, and 30% of Dutch. Respondents in Poland (30%) and Romania (27%) prefer NATO.

Outside the EU, respondents in the United Kingdom (41%), Canada (39%), and the United States (36%) make NATO their first choice for dealing with Russia. Those in Türkiye favor an independent national approach (56%) over NATO (18%) and the EU (13%). An independent national policy is the second preference in Italy (22%), France (18%, tied with NATO), Romania (25%, tied with the EU), and the United States (19%). In no country surveyed is there significant backing for working with the United States—an option that only 9% of respondents support.

## Managing Relations with China

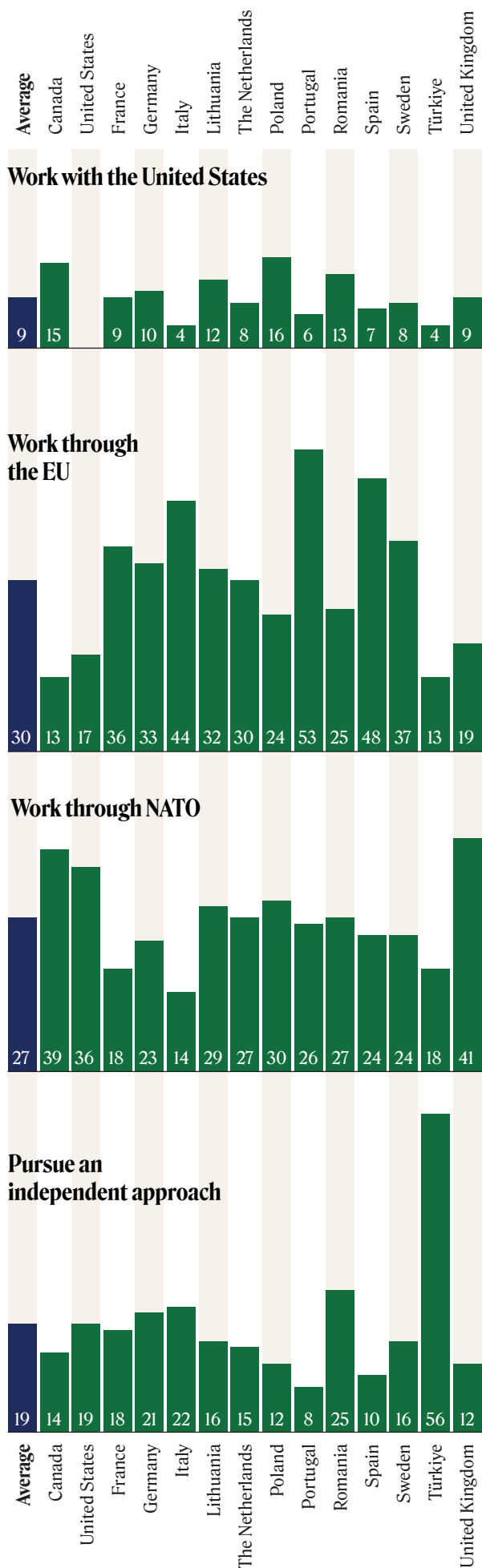
For European respondents, the EU is also the favored partner for managing ties with China. This is backed by strong majorities in Portugal (67%) and Spain (58%), half of respondents in Sweden (50%), and clear pluralities in France (41%), Germany (41%), Italy (47%), Lithuania (43%), the Netherlands (41%), and Poland (40%). Romanian respondents are slightly more evenly divided, with 33% in favor of the EU as a partner in dealing with China and 27% in favor of an independent approach. The British also favor the EU option (27%) ahead of an independent policy (24%) or cooperating with Asian partners (12%).

As with dealing with Russia, respondents in Türkiye have a clear preference for a national approach to China (56%). US and Canadian respondents are more divided, with no option being a clear preference. Canadians voice the strongest backing for working with the United States at 23%, while support for this option in the other countries ranges from 5% in Türkiye to 18% in Poland.

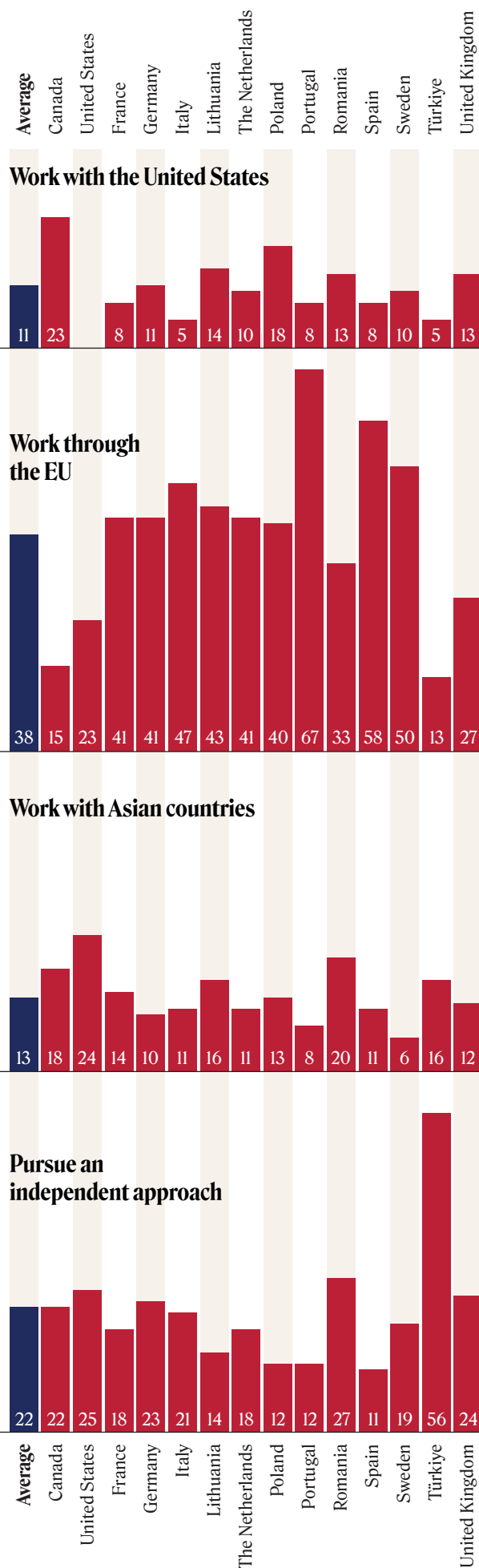
### SPOTLIGHT

In almost all countries, a significant share of respondents do not express an opinion on how best to deal with Russia and China (an average of 15% and 16% respectively), suggesting that these issues are still difficult to grasp for many.

## Managing Relations with Russia



## Managing Relations with China



## Reactions to the War in Ukraine

Respondents across most countries favor their government taking several actions to respond to Russia's invasion of Ukraine. There is strong support for prosecuting Russia for war crimes (74%) and imposing stronger economic sanctions (71%). Opinions are more divided on the question of sending NATO troops to Ukraine (46% for vs. 40% against).



The results show very clear support for Ukraine becoming a member of the EU (63%) and of NATO (58%). Respondents also strongly back action to hold Russia accountable through the prosecution of war crimes as well as economic sanctions. Support for prosecuting Russia for war crimes and for more sanctions is strongest in Portugal (90% and 88% respectively), Poland (86% and 84%), and Lithuania (81% and 78%). Turkish respondents are far more reticent about taking action against Russia, with 42% for the prosecution of war crimes and 42% for more economic sanctions.

Supporters of far-right parties across Europe are less in favor of punishing Russia than those of centrist parties. Only 51% of Lega and Fratelli d'Italia supporters in Italy are for imposing sanctions compared to 82% of supporters of the center-left Democratic Party. In Germany, only 36% of Alternative for Germany supporters favor sanctions while there is strong support for sanctions among supporters of the centrist parties and even among those of The Left (73%). In France, 62% of supporters of the National Rally favor sanctions compared to 89% of those of the centrist La République En

Marche!. Supporters of far-right parties are also less likely to favor taking in Ukrainian refugees, including those of the National Rally (37%) and of Alternative for Germany (34%).

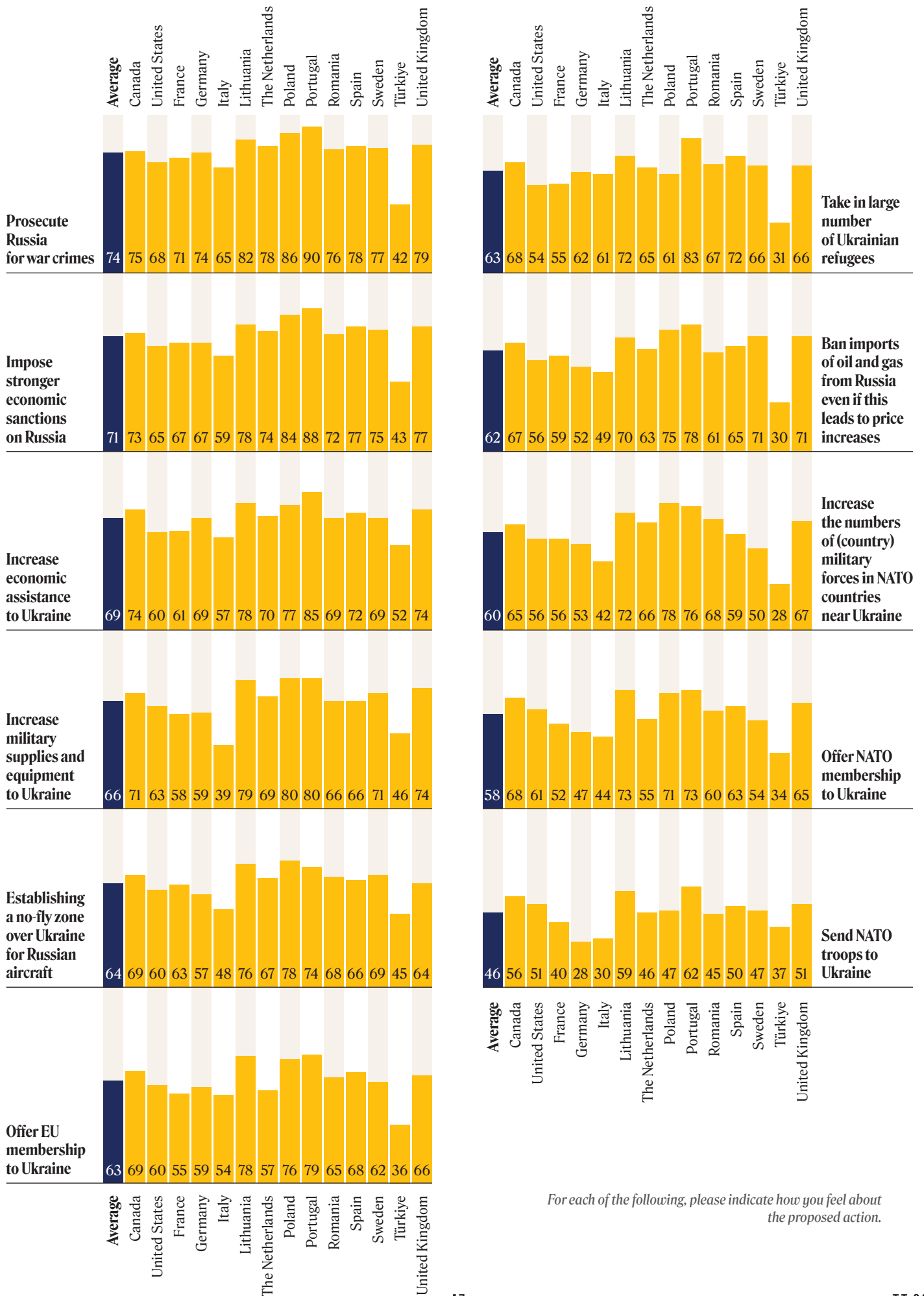
In the United States, while there is bipartisan support for Ukraine in Washington, Democratic and Republican respondents differ by 7 to 19 points with regard to all potential actions concerning the war. For example, 72% of supporters of the Democrats say the United States should accept Ukrainian refugees compared to 45% of Republicans.

### SPOTLIGHT

There is a clear regional divide in Germany as to actions toward Russia. On all options, Germans in the east lag from 8 to 21 points behind their counterparts in the south, north, and west of the country. The biggest divide is over banning Russian oil and gas even if it leads to price increases for consumers, which is supported by majorities of respondents in the west (59%), north (55%), and south (53%) but not in the east (38%).

# Actions to React to the War in Ukraine

total, somewhat and strongly agree



For each of the following, please indicate how you feel about the proposed action.



## Enlargement of NATO

There is overwhelming support in Europe (73%) for Finland and Sweden joining NATO. The strongest backing is in Portugal (90%), Poland (86%), and Lithuania (84%), while only 36% in Türkiye are in favor.



Support for Sweden and Finland joining NATO is very high across the countries surveyed, ranging from 64% in Italy to 90% in Portugal. Majorities of respondents in Lithuania (64%), Portugal (63%), Romania (53%), and Poland (51%) as well as a plurality of respondents in the Netherlands (45%) “strongly agree” with this decision. In Sweden, long known for its neutrality, 65% favor joining the alliance.<sup>2</sup> On the other side of the Atlantic, 74% of Canadians and 66% of Americans support the two Nordic countries becoming members. Support for this enlargement of NATO in the United States is thus clearly lower than the average across countries (73%), and lower than in the United Kingdom (75%), Germany (74%) and France (73%). In Türkiye, a little more than a quarter of respondents (28%) “strongly disagree” with membership for Finland and Sweden.

Support for Finland and Sweden joining NATO is found across age groups. However, in many countries, this support is strongest among the oldest respondents, who more often say they “strongly agree” with this decision over the youngest respondents who only “somewhat agree.” This is particularly striking in the Netherlands (a difference of 47 points) and in the United Kingdom (43 points), and to a lesser extent in Germany (35 points). Similar divides can be found in the United States, Canada, Poland, Portugal, Lithuania, and France.

NATO membership for Finland and Sweden has support across the political spectrum in most countries, although it is generally lower among supporters of Europe’s far-right parties. Notable examples include the difference in France between supporters of the National Rally (71%) and of La République En Marche! (93%), and in Germany between supporters of Alternative for Germany (51%) and the Social Democratic Party (90%), the Christian Democratic Union/Christian Social Union (87%), and The Greens (83%).

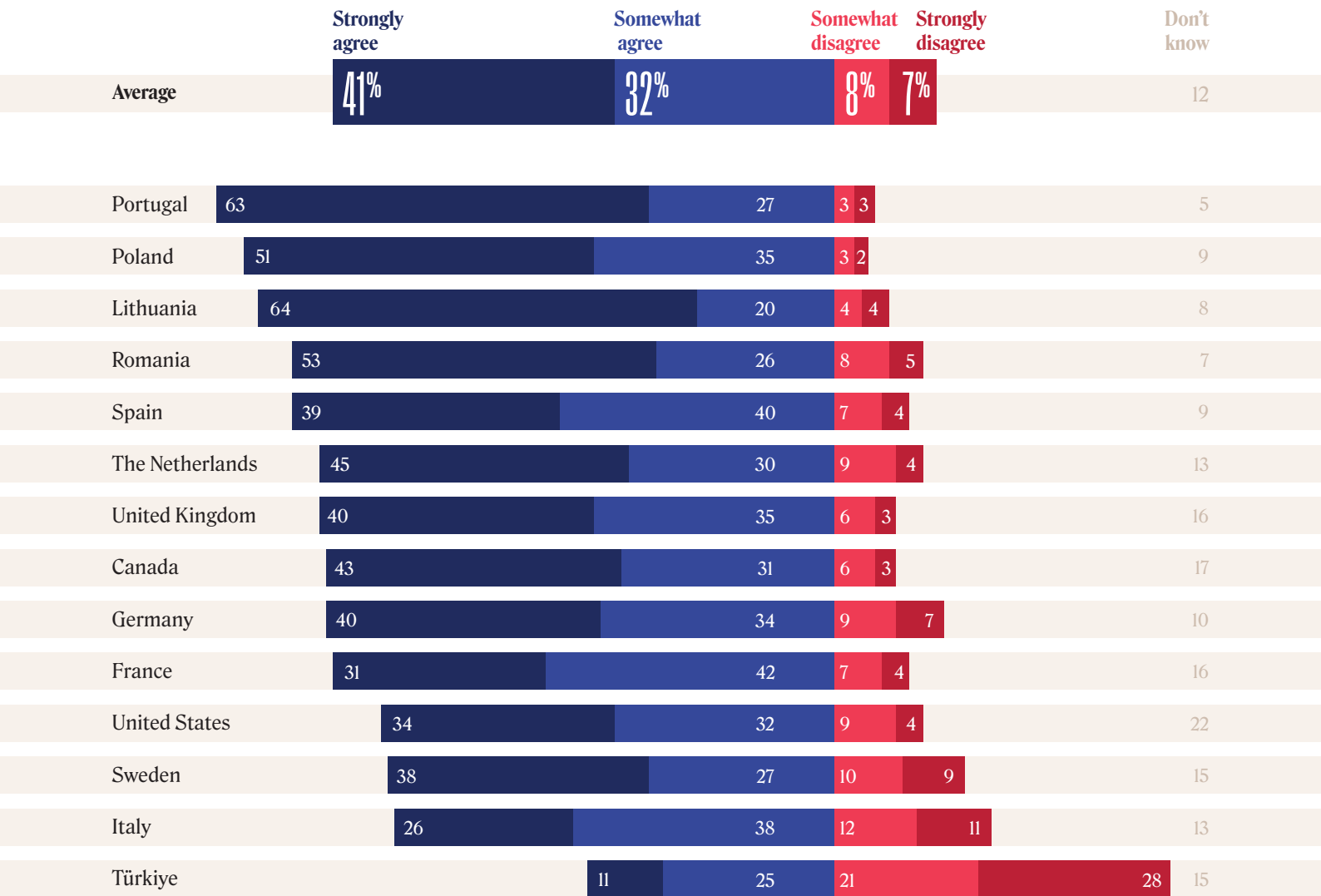
### SPOTLIGHT

There is broad public support for Finland and Sweden joining NATO among Swedish respondents, including 80% of supporters of the liberal-conservative Moderate Party, 75% of the Social Democrats, and 62% of the far-right Sweden Democrats. In each of these parties, a plurality “strongly agree” with this decision. There is also support across generations, although 52% of respondents aged 55+ “strongly agree” while 29% of those aged 18–24 and 24% of those aged 25–39 do so.

<sup>2</sup> As a reminder, fieldwork for the Transatlantic Trends in Sweden was conducted from June 23 to July 8, 2022; that is, at the very moment when Sweden’s NATO accession talks were completed.

# Enlargement of NATO

Do you agree or disagree with the short-term enlargement of NATO, favoring the entry of other European countries, such as Sweden and Finland?

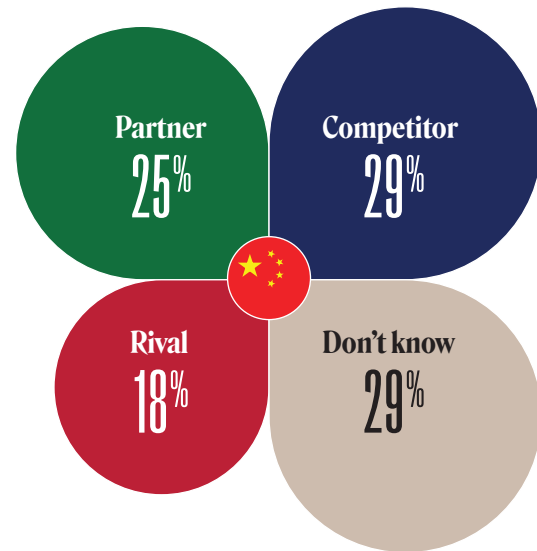


An aerial photograph of the Shanghai skyline at dusk, featuring the Oriental Pearl Tower and various skyscrapers along the Bund. A large, semi-transparent red graphic shape is overlaid on the left side of the image, containing the word "China" in white serif font.

# China

## Bilateral Relationship with China

While respondents in most countries surveyed tend to see China as a competitor, a large share of them do not know whether to classify it as a partner, a competitor, or a rival.



The complexity of the relationship with China for countries on both sides of the Atlantic is reflected in public opinion. Except in the United States, almost a quarter of respondents in the countries surveyed say that they do not know whether China is a partner, a competitor, or a rival to their country. This is particularly pronounced in Sweden (43%), Lithuania (36%), Poland (34%), and the Netherlands (31%). In nine countries, a plurality of respondents describe China primarily as a competitor. This perception is stronger in Germany (43%), France (39%), Spain (37%), Italy, and the United States (both 34%). In the United States, the share of respondents seeing China as a competitor (34%) is only slightly higher than that of those seeing it as a rival (32%). This is also the case to a lesser extent in Canada (28% competitor, 24% rival).

Strong pluralities of respondents in Romania (46%) and Portugal (44%) see China as a partner. Yet, as in other countries, those who do not know how to describe the relationship amount to more than a quarter (28% in Portugal, 26% in Romania). In contrast to the Romanian and Portuguese respondents, only 12% of British respondents see China as a partner. In the United Kingdom, 32% say that China is a competitor and 23% that it is a rival, with 34% unable to classify the relationship. In Lithuania, 14% of respondents see China

as a competitor—the lowest percentage among all countries—and 21% see it as a rival while 29% see it as a partner. Still, too, a plurality of Lithuanian respondents are unable to answer this question (36%).

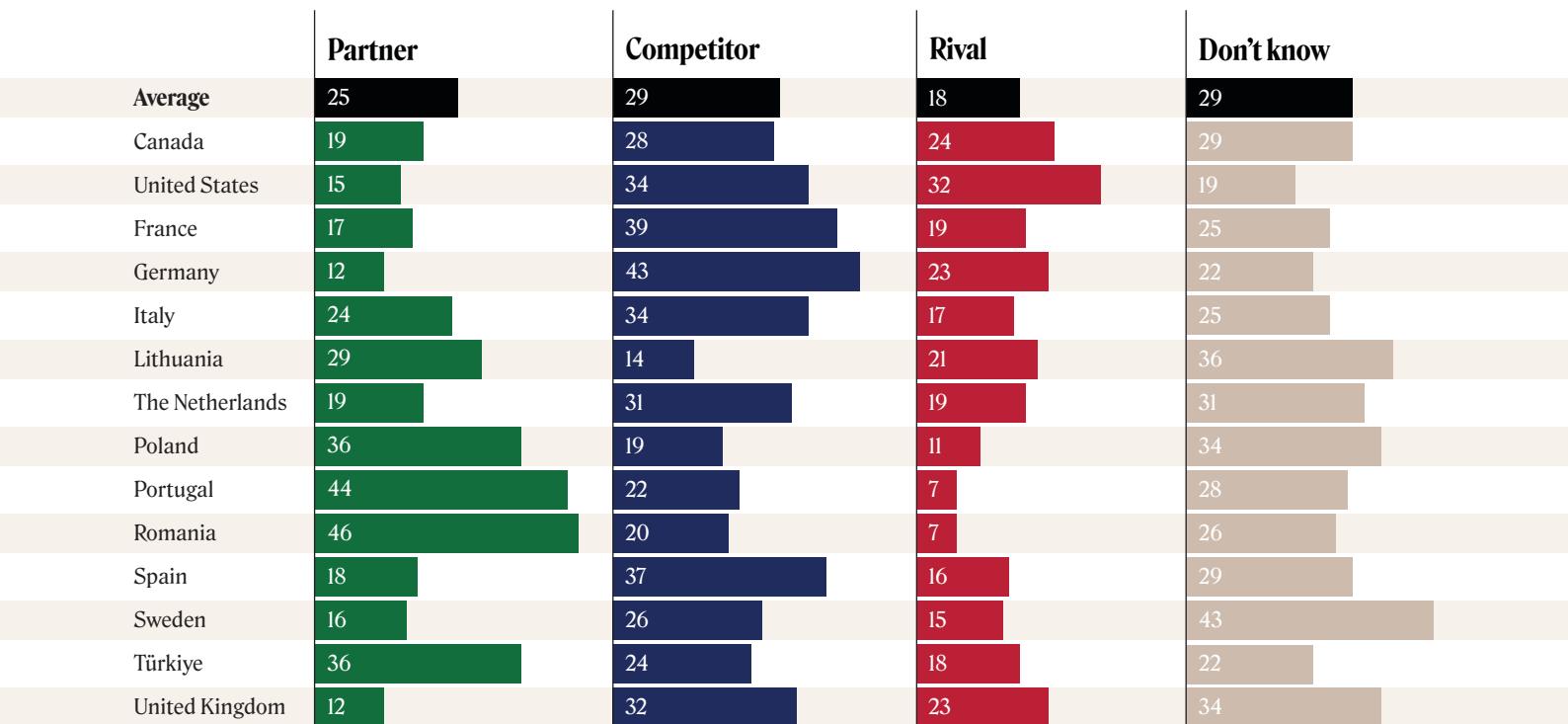
In contrast to other questions relating to China, there is no generational similarity of opinion about its influence across countries. The youngest age group is more likely than the oldest one to see China as a partner in the United States (25% vs. 3%), Canada (31 vs. 14%), Sweden (25% vs. 14%), and Germany (21% vs. 10%). By contrast, the oldest age groups see China as a partner more than the youngest one in Romania (57% vs. 33%), Italy (31% vs. 11%), Poland (43% vs. 28%), and Portugal (47% vs. 35%).

### SPOTLIGHT

Male respondents tend to hold a more confrontational view of relations with China. They are more likely than female ones to see China as a rival particularly in Lithuania (27% vs. 16%), the United Kingdom (28% vs. 18%), and Canada (28% vs. 19%). In many countries, there is a similar gender gap in the assessment of China as a competitor—for example, in the Netherlands, 38% of male respondents hold this view compared to 24% of female ones.

## Bilateral Relationship with China

*How do you primarily perceive your country's relationship with China?*



## Preferred Approach vis-à-vis China

**Across countries and policy areas, a plurality of respondents support a tougher approach toward China, either unilaterally or with partners, except when it comes to dealing with new technologies, where they want more cooperation.**

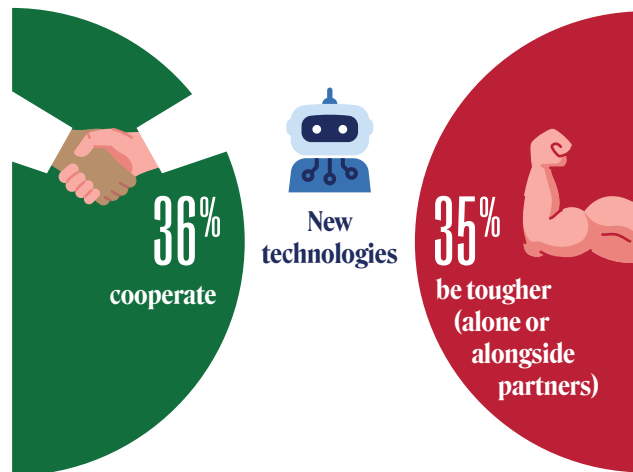
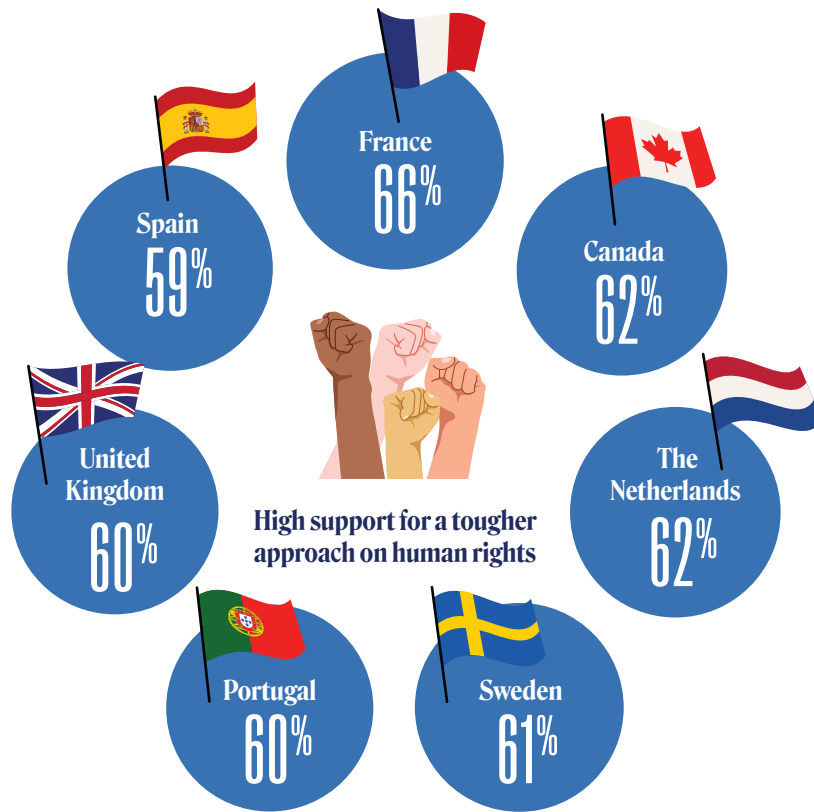
Respondents overall favor their country—with partners or on its own—taking a tougher approach toward China, but opinions diverge significantly between countries and across policy areas. Except in Türkiye and Lithuania, a clear majority of respondents support a tougher approach with China on human rights, either unilaterally or multilaterally. The respondents most in favor of getting tough are the French (66%), the Canadians and Dutch (both 62%), the Swedes (61%), the Portuguese and British (both 60%), and the Spaniards (59%). The policy area in which respondents across countries are most in favor of cooperation with China is new technologies. More than half of Turkish (58%) and Lithuanian (51%) respondents share this view, and the appetite for cooperation is also relatively high in Romania (48%) and Italy (42%).

Public opinion in France and Spain converges regarding how to approach China in every policy area. French respondents show stronger support for a tougher approach on human rights than Spanish ones do (66% vs. 59%). The policy area with the highest shares of respondents favoring cooperation is new technologies (27% in France, 31% in Spain).

The appetite for cooperation with China is highest in Türkiye, Lithuania, and Romania; regardless of the policy area, between one-third and half of the respondents in these countries favor working with China. Lithuania, whose diplomatic relationship with China has deteriorated significantly over the last year, has by far the highest share of respondents favoring cooperation with it. For Lithuanians, the preference for cooperation over a tougher approach prevails with regard to trade (52% vs. 30%), new technologies (51% vs. 29%), energy and raw materials (46% vs. 31%), climate change (41% vs. 33%), and the management of pandemics (39% vs. 33%).

### SPOTLIGHT

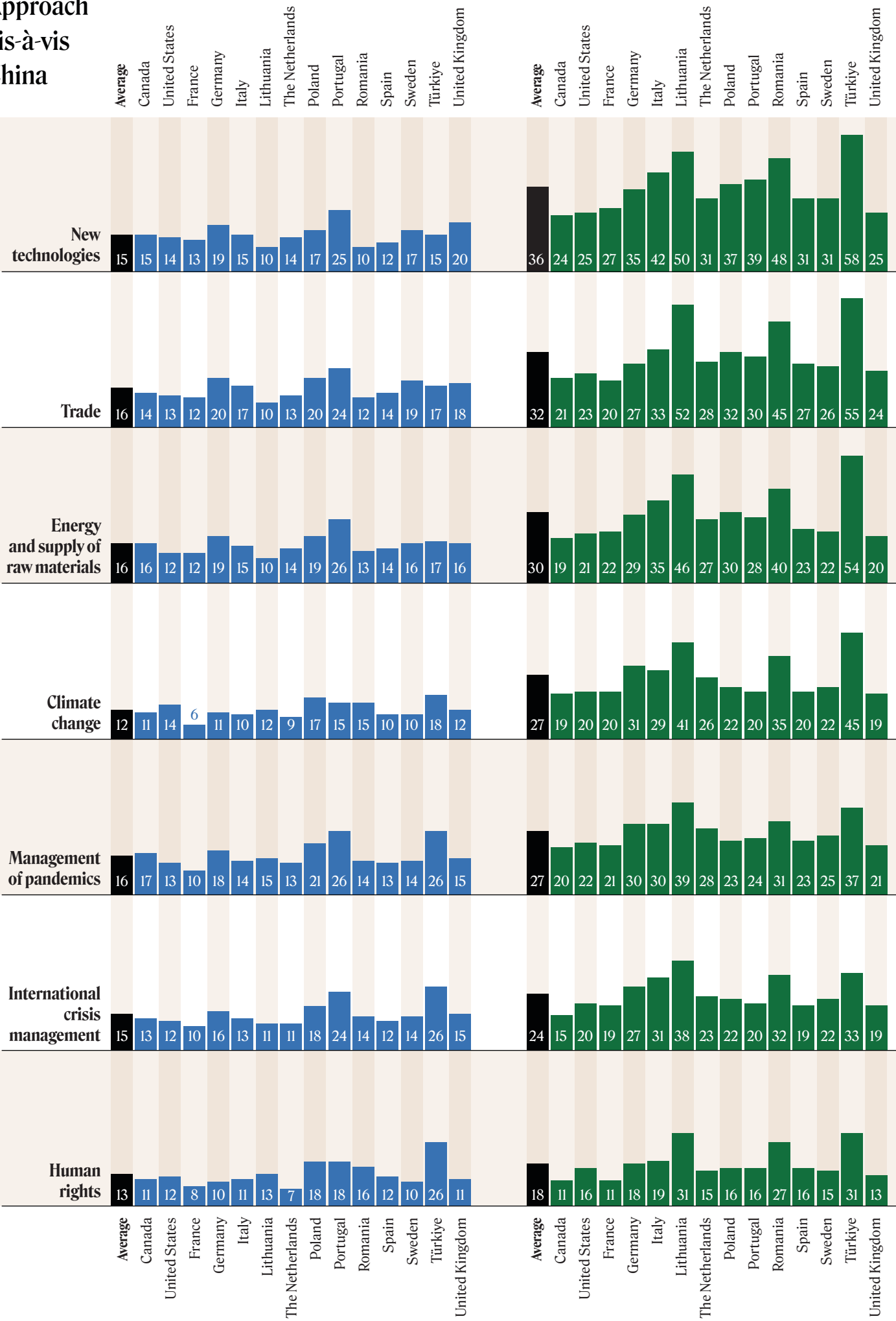
French respondents, more than those in any other country in the survey, advocate a tougher approach toward China across all policy areas. They are closely followed by Spanish respondents in this regard.



# Desired Approach vis-à-vis China

## Maintain Current State of Affairs

## Cooperate More with China





## Be Tougher on China Only Alongside Your Country's Partners

## Be Tougher on China Regardless of Your Country's Partners' Positions

How do you think your country should approach China regarding the following issues?

Average  
Canada  
United States  
France  
Germany  
Italy  
Lithuania  
The Netherlands  
Poland  
Portugal  
Romania  
Spain  
Sweden  
Türkiye  
United Kingdom

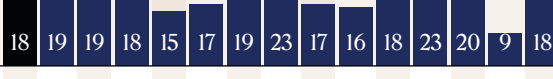
Average  
Canada  
United States  
France  
Germany  
Italy  
Lithuania  
The Netherlands  
Poland  
Portugal  
Romania  
Spain  
Sweden  
Türkiye  
United Kingdom



New technologies



Trade



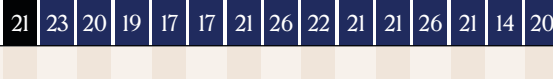
Energy and supply of raw materials



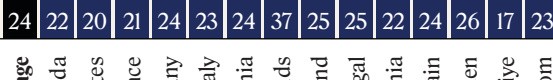
Climate change



Management of pandemics



International crisis management



Human rights

Average  
Canada  
United States  
France  
Germany  
Italy  
Lithuania  
The Netherlands  
Poland  
Portugal  
Romania  
Spain  
Sweden  
Türkiye  
United Kingdom

Average  
Canada  
United States  
France  
Germany  
Italy  
Lithuania  
The Netherlands  
Poland  
Portugal  
Romania  
Spain  
Sweden  
Türkiye  
United Kingdom

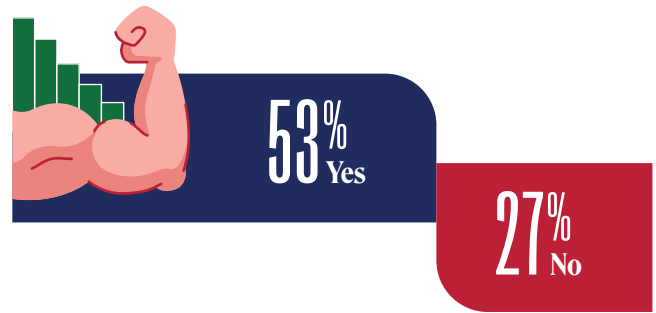
## Tougher Approach on China Regardless of Negative Economic Impact

**Respondents favoring a tougher approach by their country to China, unilaterally or with other countries, in any policy area tend to stick to that opinion, even if this comes at an economic cost.**

A majority of respondents in all countries, except Lithuania and Türkiye, support a tougher approach to China, unilaterally or with partners (see question 22). Except in Romania and Türkiye, around half or more of those respondents favoring getting tough in any policy area also say they are willing to accept the domestic economic price of tougher policies. Six out of ten or more respondents in Spain (64%), Sweden (63%), Canada (61%), the Netherlands (61%), and France (60%) maintain their support for a tougher approach toward China even if it leads to higher costs at home. Slightly smaller shares of respondents, but still majorities, in the United Kingdom (57%) and Germany (54%) would also do so.

In many countries, there is a gender gap when it comes to willingness to accept an economic cost for a tougher approach to China. This gap is of 20 points in Portugal (62% of men vs. 42% of women), 15 points in the United Kingdom (64% vs. 49%), 13 points in Lithuania (54% vs. 41%), 12 points in Canada (66% vs. 54%), and 11 points in France and the Netherlands (66% vs. 55%).

Respondents aged 18–24 are more likely than older ones to oppose being tough on China if this entails a cost. This is particularly the case in the United Kingdom (46% of the youngest age group vs. 11% of the oldest one), Poland (45% vs. 17%), Germany (39% vs. 14%), and Canada (34% vs. 10%).

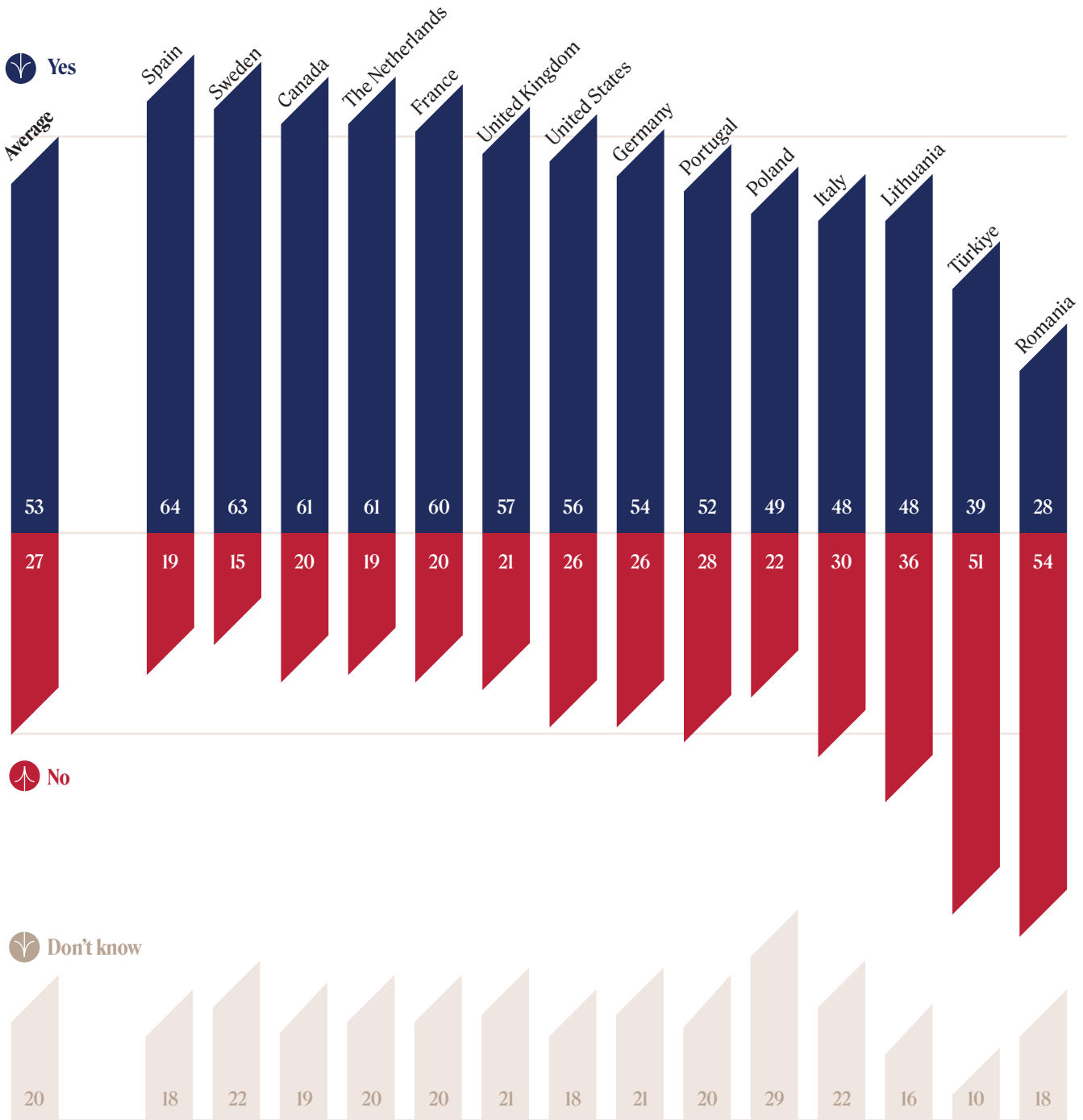


### SPOTLIGHT

In Germany, respondents supporting the liberal Free Democratic Party are much more likely to abandon their support for a tougher approach on China if this could harm the economy: only 42% of them would maintain a tougher approach. This is below the national average (54%) and clearly diverges from the opinion of supporters of the Social Democratic Party (64%), The Greens (62%), and the Christian Democratic Union/Christian Social Union (60%).

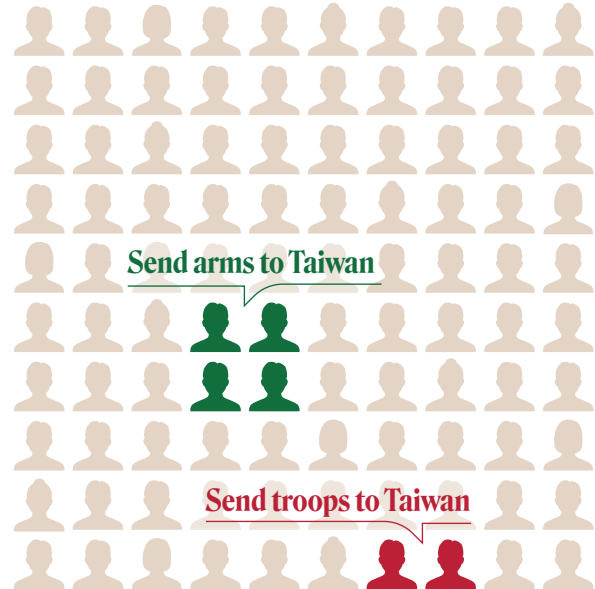
# Tougher Approach on China Regardless of Negative Economic Impact

Would you still want your country to be tougher on China even if this had a negative impact on your country's economy?



# Scenario of an Invasion of Taiwan

When asked about the potential actions for their country to take should China invade Taiwan, respondents are cautious: support for diplomatic initiatives and sanctions is high, but there is little to no appetite for sending arms or troops.



Pluralities in France, Italy, Lithuania, Poland, Romania, Spain, Türkiye, and the United States say they want their country to only take diplomatic steps should China invade Taiwan. By contrast, pluralities in Canada, Germany, the Netherlands, Portugal, Sweden, and the United Kingdom say they want their country to join others in imposing sanctions against China. Across the 14 countries surveyed, 35% of respondents support only diplomatic measures and 32% joint economic sanctions while very few support sending arms (4%) or troops (2%) to Taiwan. And 12% want their country to take no action.

The clearest preferences for an exclusively diplomatic response to a Chinese invasion of Taiwan are from Romanian and Turkish respondents (45%), followed by Italian (44%) and Lithuanian and Portuguese (both 38%) ones. The strongest support for imposing joint sanctions is in Portugal (40%) and Canada, Germany, and Sweden (each 39%). There is a gender gap in many European countries, however. Men support sanctions more than women do in the Netherlands (45% vs. 29%), Sweden (46% vs. 32%), Germany (45% vs. 33%), the United Kingdom (45% vs. 35%), and France (33% vs. 23%).

Overall, there is very little appetite for involvement beyond diplomatic measures and sanctions. The share of respondents who want their country to send arms or troops to Taiwan is highest in the United States, but it is small (8%

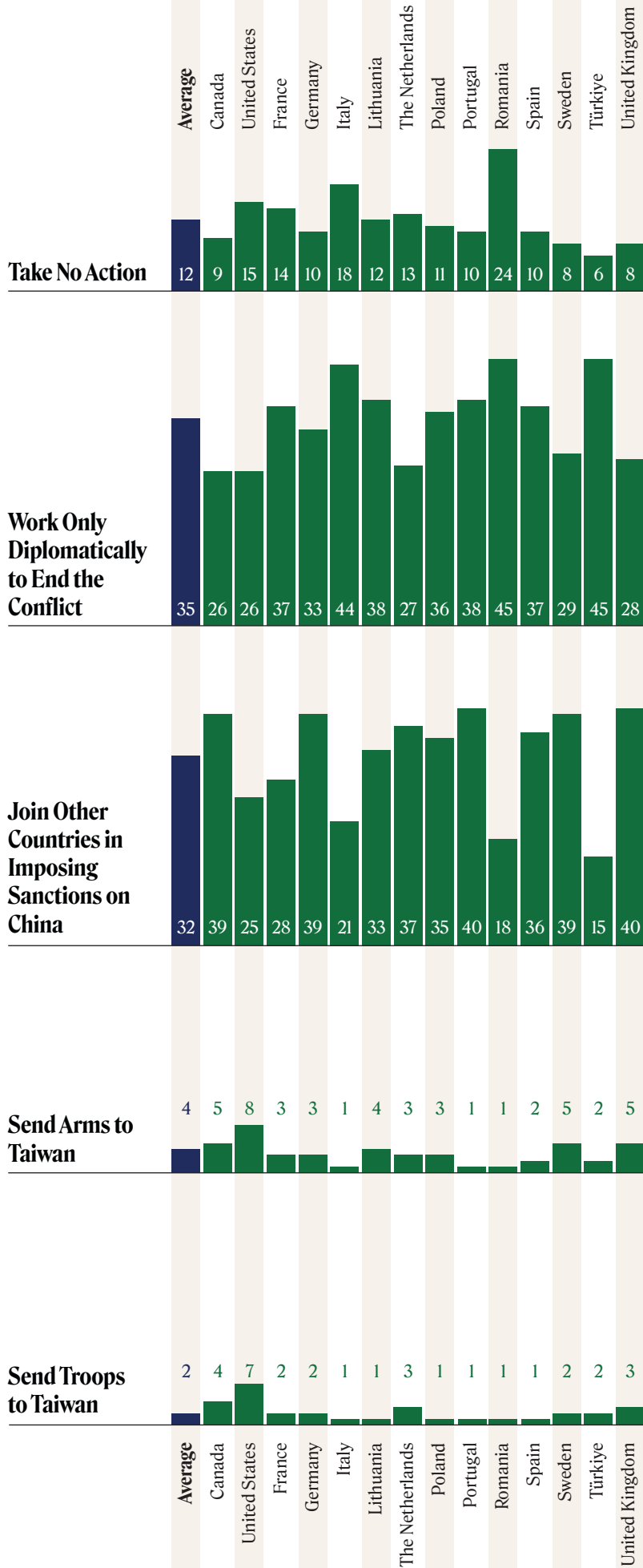
and 7% respectively). Support for these measures is also very low among the United States' closest allies in Europe: in the United Kingdom (5% and 3%) and France (3% and 2%). In other countries, less than 5% of respondents support the deployment of troops, with the lowest shares of between 1% and 2% in Italy, Poland, Türkiye, Spain, Romania, and Lithuania. Sending arms does not have much more support, with the highest backing for this (5%) in Canada, Sweden, and the United Kingdom.

**SPOTLIGHT**

In the United States, the preference for diplomatic measures or imposing sanctions alongside other countries is supported across the partisan divide. The only difference is when it comes to respondents who want no action at all (20% of supporters of the Republicans vs. 13% of supporters of the Democrats) and to those supporting arms deliveries to Taiwan (12% of Republicans vs. 8% of Democrats).

# Scenario of an Invasion of Taiwan

If China invades Taiwan, do you think your country should...



# About the Partners



The German Marshall Fund of the United States (GMF) is a non-partisan policy organization committed to the idea that the United States and Europe are stronger together. GMF champions the principles of democracy, human rights, and international cooperation, which have served as the bedrock of peace and prosperity since the end of the Second World War but are under increasing strain. GMF works on issues critical to transatlantic interests in the 21st century, including the future of democracy, security and geopolitics, alliances and the rise of China, and technology and innovation. By drawing on and fostering a community of people with diverse life experiences and political perspectives, GMF pursues its mission by driving the policy debate, fortifying civil society, and cultivating the next generation of leaders on both sides of the Atlantic.

[www.gmfus.org](http://www.gmfus.org)



The Bertelsmann Foundation (North America), Inc., established in 2008, was created to promote and strengthen the transatlantic relationship. Through research, analysis, forums, and audio and multimedia content, we seek to educate and engage a transatlantic audience on the most pressing economic, political, and social challenges facing the United States and Europe. We are the US arm of the Germany-based Bertelsmann Stiftung.

[www.bfna.org](http://www.bfna.org)



The BBVA Foundation is an expression of the BBVA Group's commitment to improving society through the generation of public goods in the knowledge domain. The promotion and dissemination of knowledge based on scientific research and artistic and cultural creation form the core of the BBVA Foundation's program. Its three lines of action toward these goals are the competitive funding of scientific research and cultural creation, the dissemination of knowledge and culture to society, and the recognition of talent through diverse families of prizes. The BBVA Foundation focuses its activity on the analysis of emerging issues in five areas: Environment (Biodiversity, Climate Change), Biomedicine, Economy and Society, Basic Sciences and Technology, and Culture.



FLAD (Luso-American Development Foundation) is a private foundation dedicated to strengthening the relations between Portugal and the United States. Our mission is to promote the economic, social, and cultural development of Portugal through bilateral cooperation with the United States.

[www.flad.pt](http://www.flad.pt)



Based in Montréal, Canada, Université de Montréal and McGill University have jointly promoted research and teaching on the European Union and transatlantic relations since 2000. Heir to the first Jean Monnet Chair established outside Europe in 1993, the Jean Monnet Centre Montréal brings together diverse researchers and students who work in a bilingual environment and are engaged with decision-makers, the business world, youth, and civil society.

[www.jeanmonnet.ca](http://www.jeanmonnet.ca)



The Konrad-Adenauer-Stiftung (KAS) is a German political foundation with projects in more than 120 countries. The work of KAS Türkiye started in 1983 and includes a variety of measures with different Turkish and international stakeholders, building strong partnerships along the way and fostering German-Turkish and European-Turkish relations with the aim of bringing Türkiye closer to European structures and institutions and of strengthening its transatlantic ties.

[www.kas.de](http://www.kas.de)



The Netherlands Embassy represents the Kingdom of the Netherlands in France. We support Dutch nationals in France and strive to contribute to a just and sustainable world, in cooperation with our partners. France is such an important political, economic, and cultural partner.

## **KANTAR PUBLIC**

Kantar Public is a world-leading independent specialist research, evidence and advisory business providing services to government and the public realm, across all aspects of public policy.

With permanent fully staffed offices in 21 countries, our 900 specialist consultants and researchers are supported by our unique global data ecosystem providing gold standard data. We combine expertise in human understanding with advanced technologies and data science to provide the evidence and advisory services for successful decision-making in governments and organizations working for the public realm. We share global best practice through local expertise.

[www.kantarpublic.com](http://www.kantarpublic.com)

# Acknowledgments

Transatlantic Trends is a project co-led by the German Marshall Fund of the United States (GMF) and the Bertelsmann Foundation (North America), Inc., with the generous support of the BBVA Foundation, the Jean Monnet Centre Montréal, the Luso-American Development Foundation (FLAD), the Konrad-Adenauer-Foundation Türkiye, and the Embassy of the Kingdom of the Netherlands in France.

The senior editors of the report are Bruce Stokes, visiting senior fellow at GMF Washington, DC; Dr. Alexandra de Hoop Scheffer, director of research for transatlantic security and director of GMF's Paris office; and Anthony Silberfeld, director of transatlantic relations at the Bertelsmann Foundation (North America), Inc.

The authors of the report are Gesine Weber, research analyst, and Martin Quencez, fellow and deputy director of the Paris office; and Brandon Bohrn, manager of transatlantic relations at the Bertelsmann Foundation (North America), Inc.

Transatlantic Trends is an all-GMF project, involving offices and programs across Europe and the United States. The authors wish to acknowledge the invaluable input and support to the project from colleagues across the organization. We also wish to express our gratitude to Eddy Vautrin-Dumaine, account director, and the team of Kantar Public Public Division, for their constant support, as well as to Catalina Raileanu from QuickData for the data visualisation and the design of the report.



# 2022 Transatlantic Trends

Fundación  
BBVA

FLAD LUSO-AMERICAN  
DEVELOPMENT  
FOUNDATION

JM JEAN  
MONNET  
CENTRE  
MONTRÉAL

KONRAD  
ADENAUER  
STIFTUNG



Kingdom of the Netherlands

KANTAR PUBLIC

 **GMF**  
Ideas.  
Leadership.  
Hope.

75 The Marshall Plan  
1947-1951  
GMF 50

Bertelsmann  
FOUNDATION