

TRANSATLANTIC TWILIGHT: EUROPEAN PUBLIC OPINION AND THE LONG SHADOW OF TRUMP

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SUMMARY

- ECFR polling reveals the gloom that has fallen over European perceptions of the transatlantic relationship since early November.
- Respondents are more likely to call the US merely a “necessary partner” rather than an “ally”.
- But views of Donald Trump’s return vary markedly according to country and political outlook.
- That, and intra-European differences on both Russia-Ukraine and China, create ample opportunities for Trump to split Europeans.
- Building a broad coalition of “Euro-optimists” along with more cautious groups can help European leaders resist any such attempts—and even forge a new dawn in transatlantic relations.

Lamps going out

On the evening of August 3rd 1914, a friend visited the British foreign secretary Sir Edward Grey in his office in London. They gazed out of the windows at the dusk street as the lamplighters moved along it. “The lamps are going out all over Europe,” commented Grey, as he later observed in his memoirs. “We shall not see them lit again in our lifetime.”

To draw comparisons between now and then might seem absurdly catastrophist. After all, Grey was referring to the imminent outbreak of the first world war. And yet that melancholic image captures something of the transatlantic alliance today as Donald Trump settles in for a second presidential term. Where once it burned bright, now it is dimming. The shadows are lengthening. Gloom is setting in—for how long is not yet clear.

That, at least, is the mood captured by ECFR’s sweeping poll of Europeans conducted in November (after the US presidential election) and December 2024. It covered 11 EU member states and Switzerland, the UK and Ukraine—as well as ten other countries around the world as part of a wider exercise already covered in [a separate ECFR report](#). Across those 14 European states, the poll found a newly pessimistic and transactional view of the transatlantic partnership.

The growing shadows do not fall evenly. In some parts of the continent and its politics—especially its populist right, in power in states like Hungary—affection for the US burns on. Even elsewhere, as it fades, more moderate leaders like Emmanuel Macron in France and Friedrich Merz, Germany’s likely next chancellor, rage against the dying of the light. They hope to use their personal ingenuity or charisma to keep the transatlantic flame burning. But as they do so, they should heed the twilight scene that our polling paints, constituted by four main findings.

Firstly, Europeans see the US less as an ally sharing the same interests and values, and more as a necessary partner with whom they must strategically cooperate. They are broadly aligned on this, but the poll also finds evidence that respondents of different political outlooks view Trump quite differently. That could point to divisions on the sort of transatlantic relationship that they would like to see in future.

Secondly, Europeans are largely united in expecting Russia-Ukraine peace negotiations, a significant shift over the second half of 2024. But here too, the pattern of light and shade is uneven. Views on what those negotiations should entail and what approach to the theatre Europe should adopt in the long term vary greatly, in ways European leaders must heed if Trump increases the pressure for talks.

Thirdly, a similar picture of division is already visible on China policy. Views among Europeans vary significantly and do not correlate neatly with views on America or Trump.

That gives the US administration room to exploit differences.

Finally, Europeans tend to see the EU in a gloomier light than most counterparts elsewhere in the world. But few believe that darkness has fallen entirely. Between the groups most optimistic and pessimistic about the union's prospects and power are two other camps that recognise shades of grey. As the glow of the transatlantic alliance fades, leaders can turn to those groups for support as they seek to illuminate Europe's own path.

Twilight is usually understood as the period just after the sunset, when the light is fading. Technically speaking, however, it corresponds to any time of day when the sun is just below the horizon. Thus it can also refer to the dawn: the moment before a new day. That very ambiguity well describes current relations between Europe and America. The old Atlanticism is disappearing. But a new one will need to be born—either soon, or after a long night.

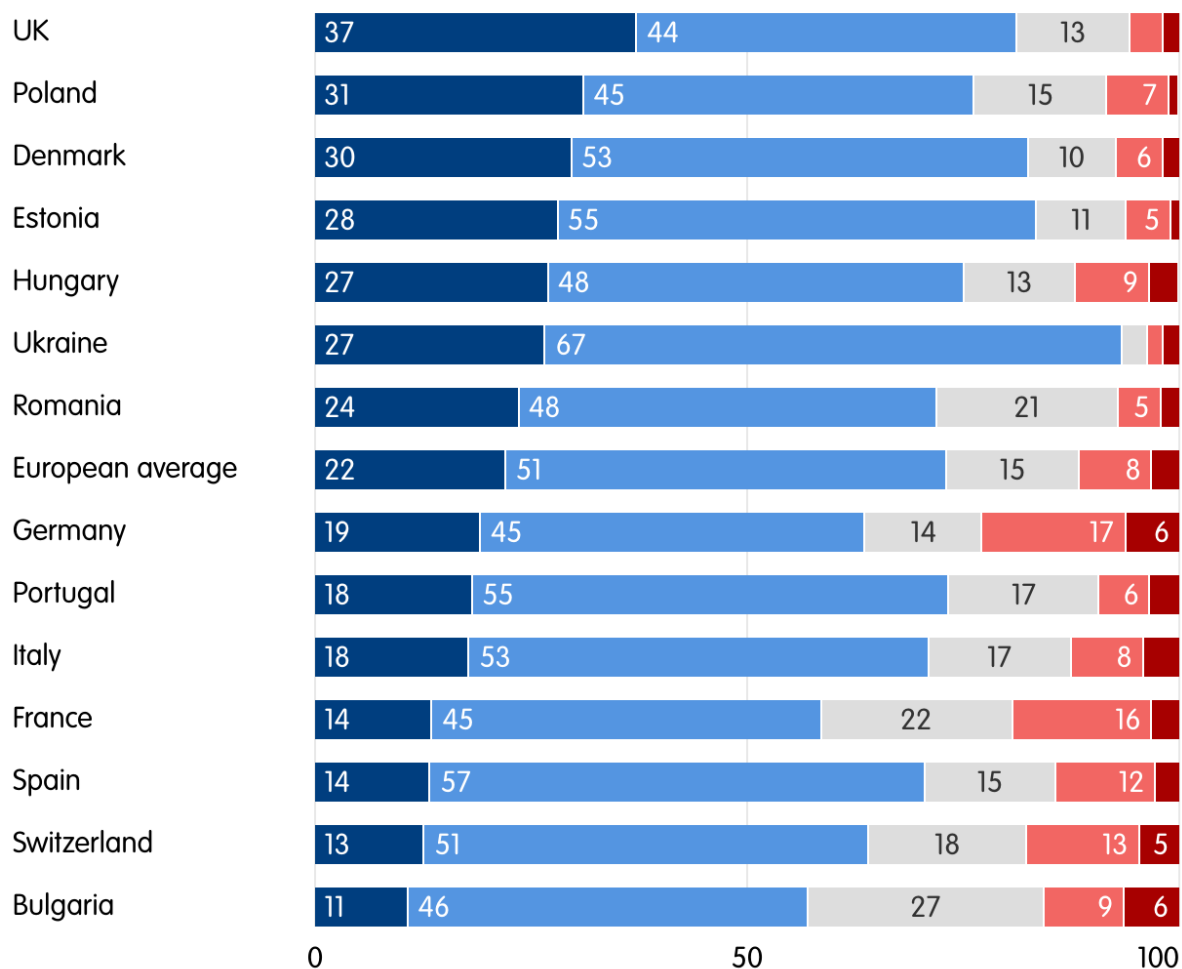
For leaders favourable to European interests and cooperation, this marks an opportunity to set transatlantic relations on a new footing. It is a chance to make Europe a more autonomous, flexible and, ultimately, more secure and self-confident partner. But if Europeans allow Trump to transfix and divide them, they will cede the task of lighting a way forward to a new, nationalist, MAGA-style transatlantic project already emerging, confident, from the shadows.

An unsentimental Atlanticism

ECFR's poll shows Europeans converging in their perceptions of the US. The most common view is that the US is not an "ally" but rather a "necessary partner" with which Europeans must strategically cooperate. This is even true in traditional Atlanticist strongholds—like Poland and Denmark—that one-and-a-half years earlier saw the US primarily as an ally. Though our polling cannot confirm causality, we contend that Trump's political return and ultimate election victory may be the main contributing factor.

Who is the US to the EU? In per cent

- An ally – that shares our interests and values
- A necessary partner – with which we must strategically cooperate
- Don't know
- A rival – with which we need to compete
- An adversary – with which we are in conflict



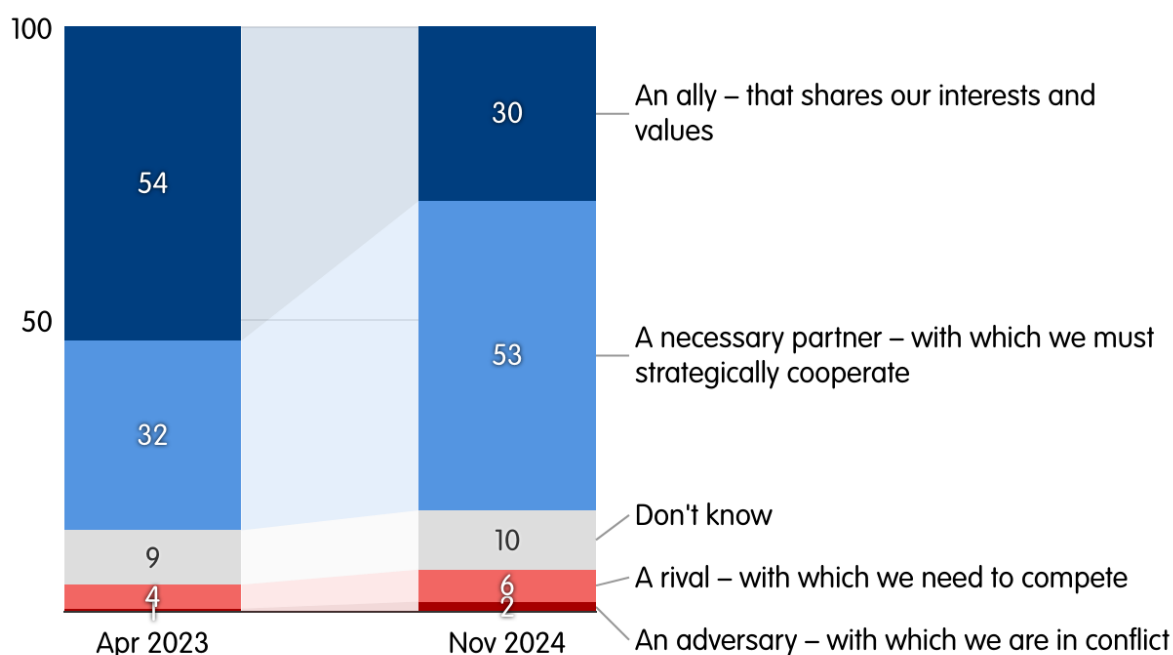
*In the UK, Ukraine and Switzerland, the question asked concerned what the US was to respondent's country.

Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.

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What is the US to the EU? Danish opinion, in per cent

Bulgaria / Denmark / France / Germany / Hungary / Poland / Spain



In 2023, the question asked concerned the US's relations with "Europe".

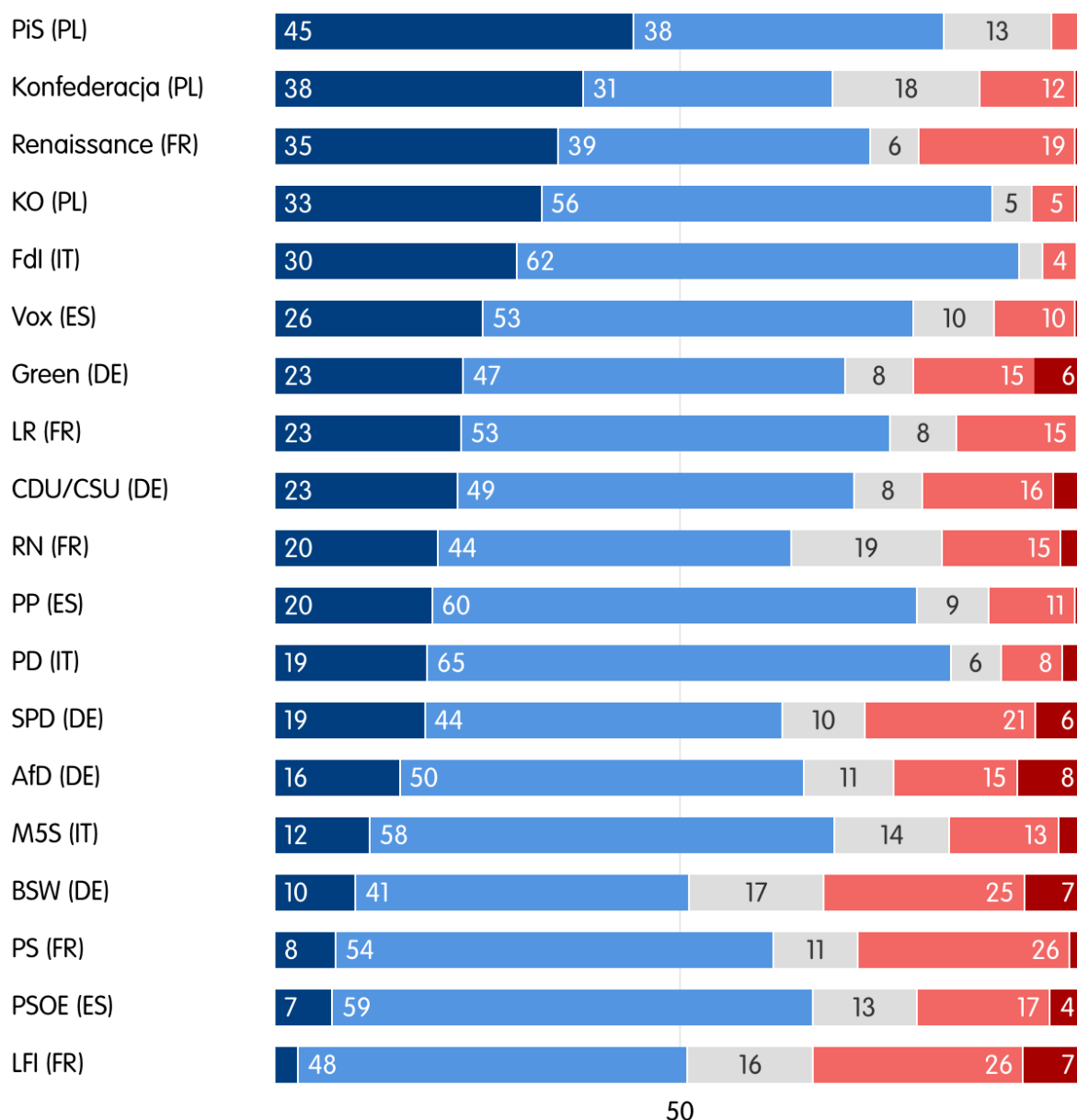
Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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A notable sub-trend within this is that supporters of Europe's far-right parties, many of them traditionally sceptical about the transatlantic alliance, buck the continental trend—but not all. Supporters of the Alternative for Germany (AfD) party now see the US in a more positive light, but attitudes among supporters of France's National Rally (RN) remain largely unchanged. This reflects the parties' leaders: Alice Weidel, the AfD's chancellor candidate, welcomed Trump's re-election with warm words, but the RN's Marine Le Pen was more subdued in her reaction.

A more consistent shift is seen in the European political mainstream. Supporters of parties like the Christian Democrats (CDU), Social Democrats (SPD), and Greens in Germany, the Socialists (PSOE) in Spain, or Macron's Renaissance in France have all revised their perception of America downwards since 2023.

Who is the US to the EU? For the main parties in the EU's five largest member states. By voter intention, in per cent

- An ally – that shares our interests and values
- A necessary partner – with which we must strategically cooperate
- Don't know
- A rival – with which we need to compete
- An adversary – with which we are in conflict

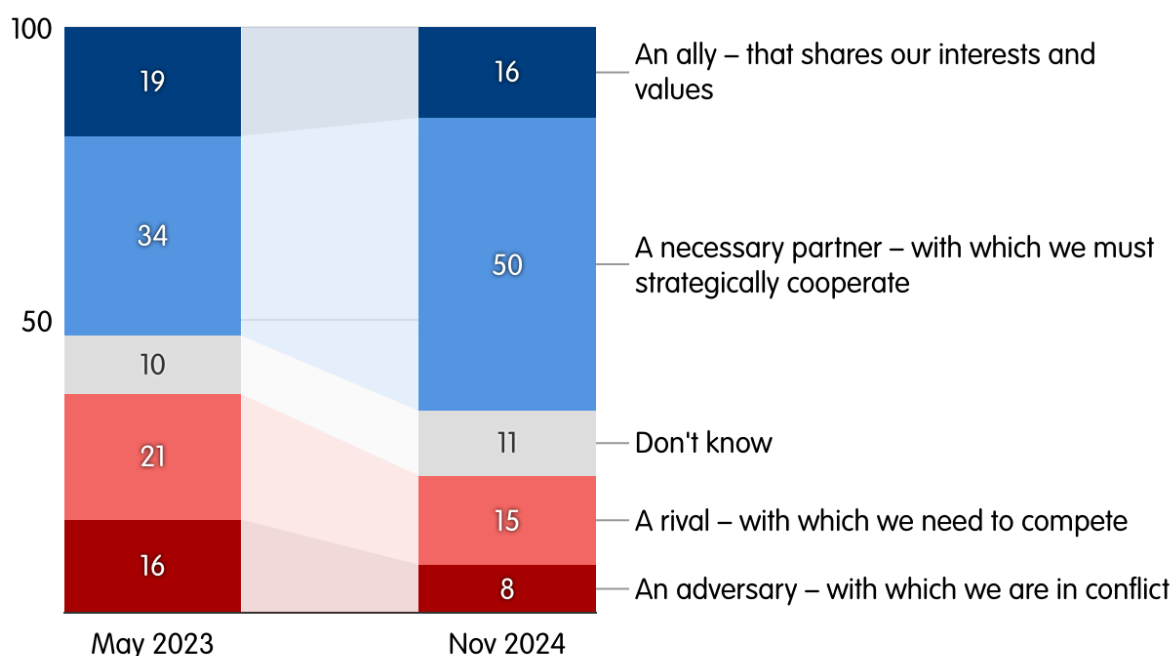


Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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What is the US to the EU?

AfD (DE) electorate, by voter intention, in per cent

AfD / CDU/CSU / Green / KO / LFI / PiS / PP / PSOE / Renaissance/LREM / RN / SPD / Vox



In 2023, the question asked concerned the US's relations with "Europe".

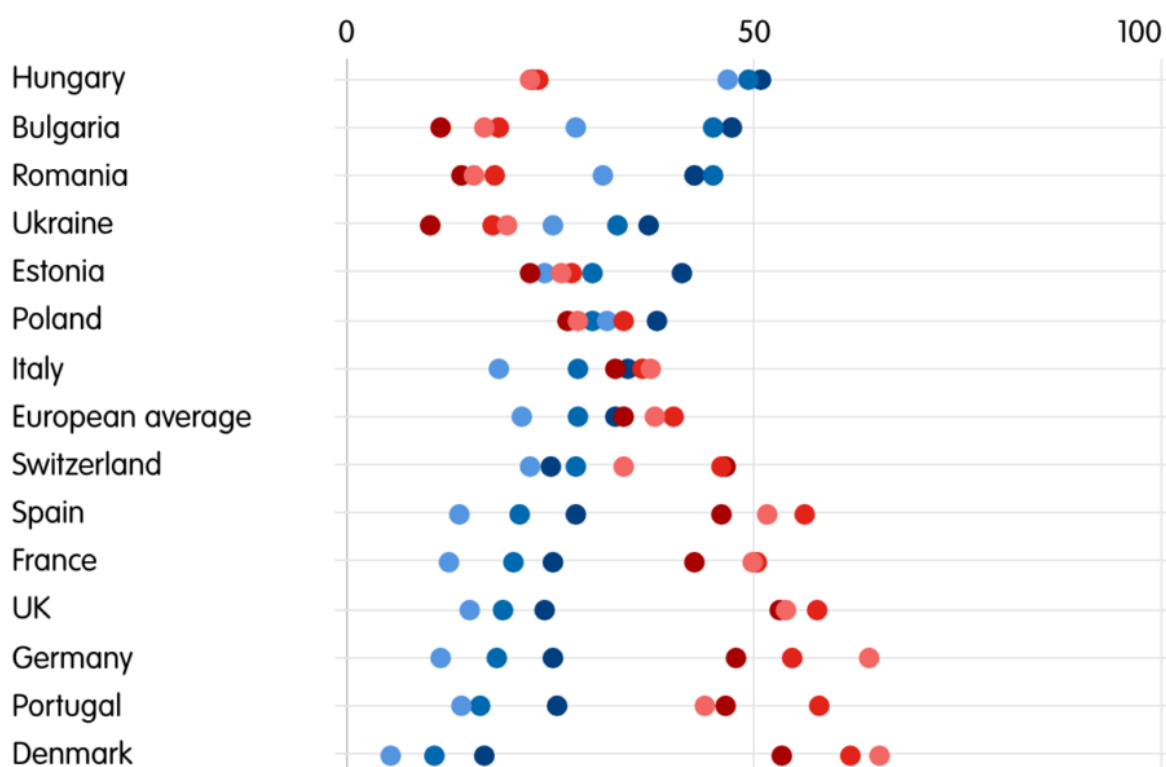
Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.

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Further evidence suggesting that Trump's election is part of this shift comes from respondents' disinclination to view this event positively. In [ECFR's recent global polling paper](#) authors Timothy Garton Ash, Ivan Krastev and Mark Leonard noted that, among respondents from all over the world, Europeans are the least likely to consider Trump's re-election a good thing for American citizens. Alongside South Koreans, they are also the least likely to consider it a good thing for their countries and peace in the world. There are differences between and within European countries—especially between supportive respondents in south-eastern Europe and detractors in northern and western parts. But the average European citizen is more likely to be pessimistic than optimistic about Trump's return—on all three accounts.

Share of respondents who consider Donald Trump's re-election to be a "good thing" or a "bad thing" for American citizens, their own country and peace in the world. In per cent

● Good for American citizens ● ...for peace in the world ● ...for their own country
 ● Bad for American citizens ● ...for peace in the world ● ...for their own country



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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This apprehension could create the basis for a pragmatic European approach to the US over the next four years—neither starry-eyed nor entirely rejectionist—that commands broad majorities in most societies. But there is clear scope for greater divergence among Europeans over time if the internal political differences sharpen.

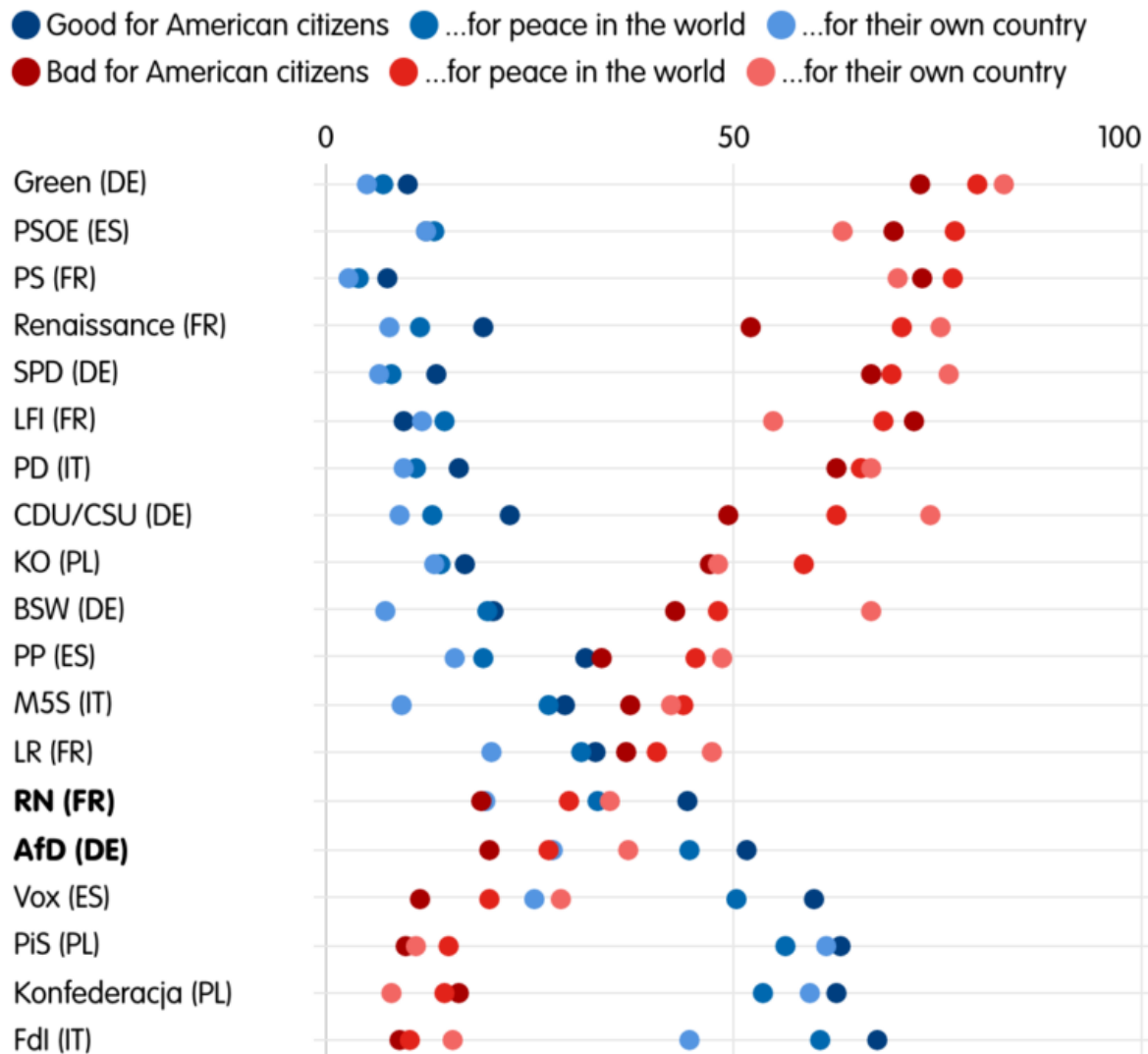
For the moment, our polling shows that supporters of (for example) the AfD and RN chiefly see the US as Europe’s partner—rather than close ally. That restrained enthusiasm for the transatlantic alliance may be rooted in those parties’ traditional view that it is an elite project—the realm of NATO summits and Davos round tables—alien to ordinary European voters. But a Trump presidency that draws the European far-right closer, both personally and ideologically, could change that.

After all, present in Washington for the inauguration on January 20th were few conventional European figures, but rather the likes of Giorgia Meloni, Viktor Orban, and the AfD’s Tino Chrupalla. Trump’s speech evoked favourite topics of those politicians and their European comrades: anti-“wokeism”, anti-greenery and anti-migration. Elsewhere Elon Musk, for his part, has established friendships with the Italian prime minister as well as with Weidel. In January he interviewed the latter on X, his social media platform, and later beamed into her party’s election campaign launch to emphasise once again that “only the AfD can save Germany.”

This nascent realignment within Europe is seen, in ECFR’s poll, in the political breakdown of respondents’ optimism about Trump’s re-election. Most upbeat are supporters of right-wing populist parties: for example, not even a fifth of voters for Poland’s Law and Justice (PiS) and Confederation (Konfederacja) parties, or Meloni’s Brothers of Italy (FdI), believe his re-election is a “bad thing” for American voters, their own country, or peace in the world. Supporters of the AfD and RN are more split, with pluralities believing Trump’s election is a bad thing for their countries.

But overall, our findings hold out the possibility that, while some lights go out on the traditional, mainstream European commitment to the transatlantic relationship, new ones start to flicker on what have until recently been the European margins. If Trump hits Europe with tariffs that hurt working-class European voters, or if his peace plan for Ukraine turns out be a disaster, he may lose some of the good will from the European far-right that he currently seems to enjoy. But for the moment, the trend points to a warm glow between Trump and his European followers, which could well evolve into a new, MAGA-style Atlanticism.

Share of respondents who consider Donald Trump's re-election to be a "good thing" or a "bad thing" for American citizens, their own country and peace in the world. For the main electorates in the EU's five largest member states. By voter intention, in per cent



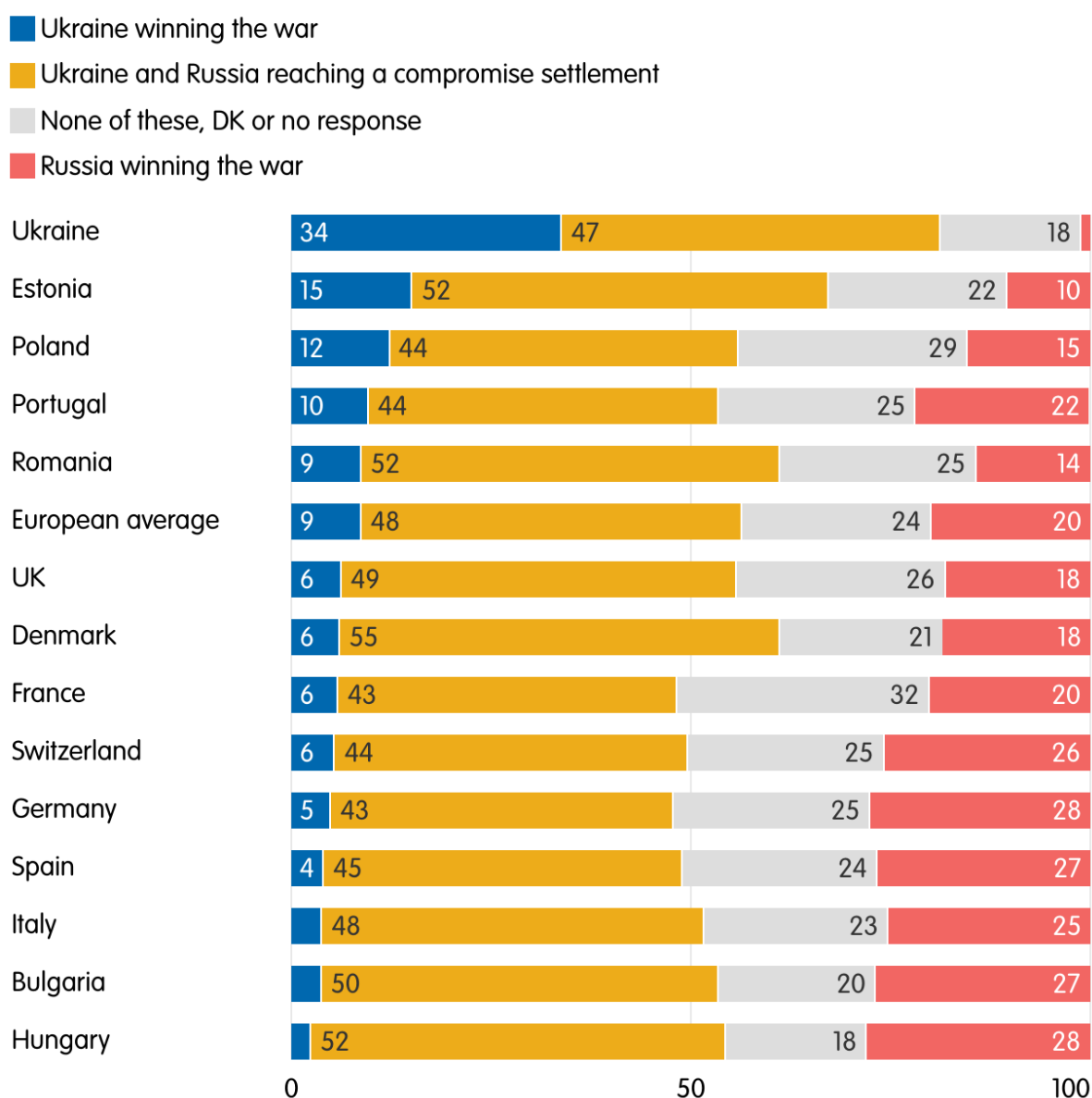
Source: Survey conducted in November and December 2024 by Datapraxix, YouGov, Norstat, and Rating Group.
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United on Ukraine talks, divided on what comes next

Arguably the most pressing transatlantic topic as the new Trump term gets underway is how the president acts on Russia's full-scale war against Ukraine. The president has indicated that

he will pressure both sides to negotiate. That, combined with Ukraine’s struggles on the battlefield, could explain why the most prevalent expectation among European publics is a “compromise settlement” between Kyiv and Moscow. This was the leading view in every country polled, including more hawkish ones like Estonia, Denmark, Poland, the UK and indeed Ukraine itself—where previous polls found greater confidence about Ukrainian victory. That could bode well for achieving common European positions on any such talks.

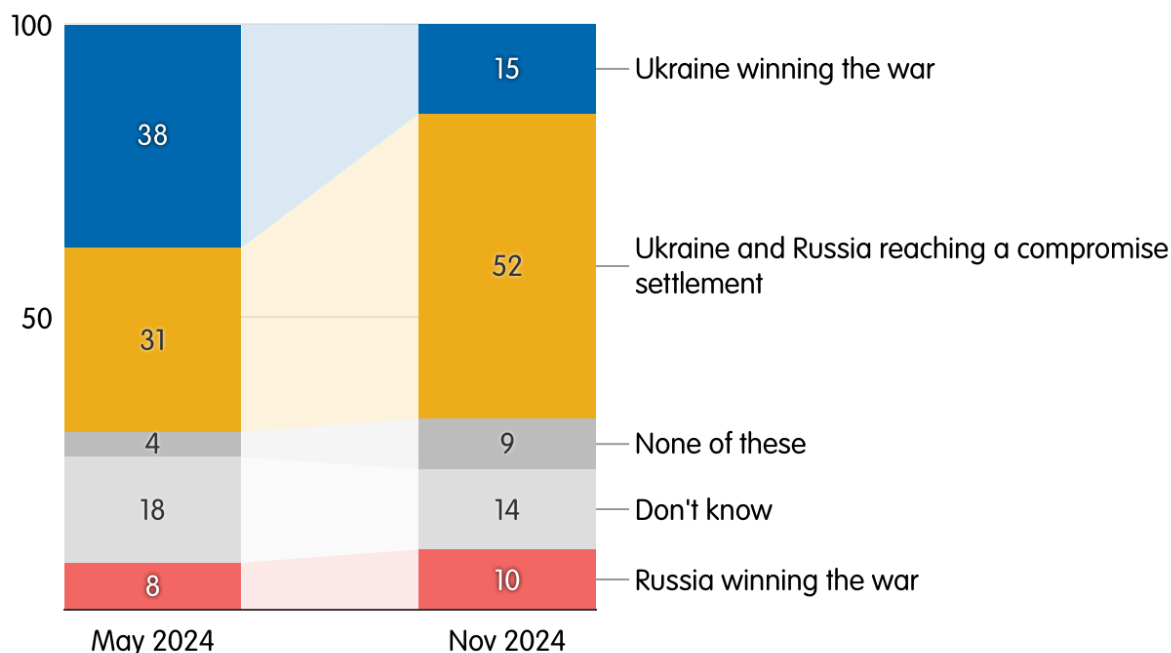
Which of these potential outcomes of the war in Ukraine do you think is the most likely? In per cent



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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Which of these potential outcomes of the war in Ukraine do you think is the most likely? Estonian opinion, in per cent

Bulgaria / Estonia / France / Germany / Italy / Poland / Portugal / Spain / Switzerland / UK / Ukraine

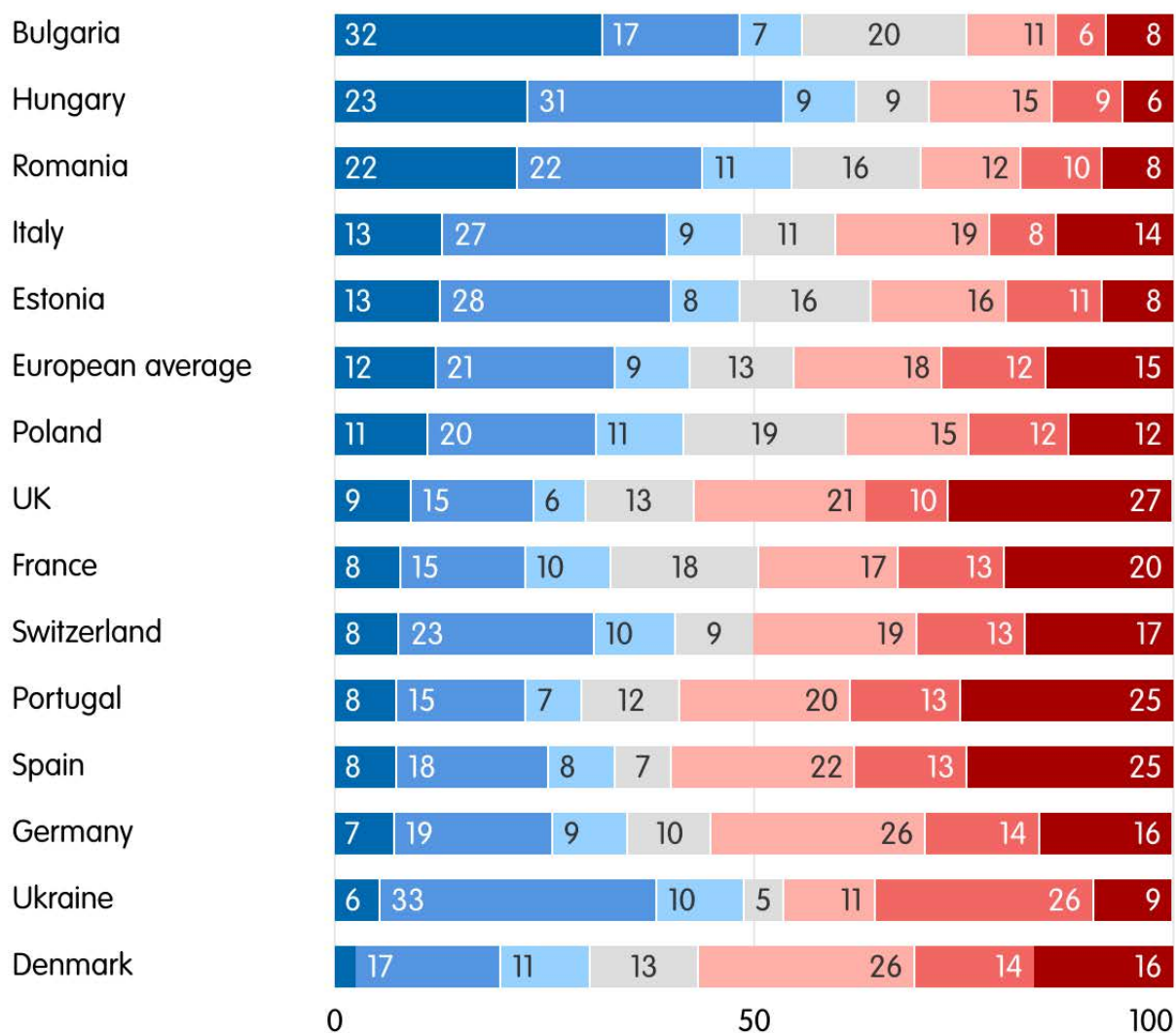
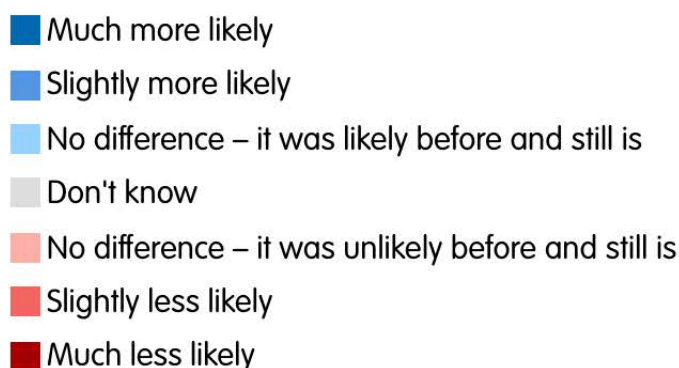


Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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But the backdrop—the transatlantic twilight that has set in since the US election campaign and result—colours that view. Europeans are broadly sceptical about the returning president’s peace-making efforts. In half of the countries polled, absolute majorities of respondents (or, in the case of France, 49%) believe that reaching peace in Ukraine will either become less likely under Trump or remain as unlikely as it was before.

Is achieving peace in Ukraine more or less likely under Trump?

In per cent



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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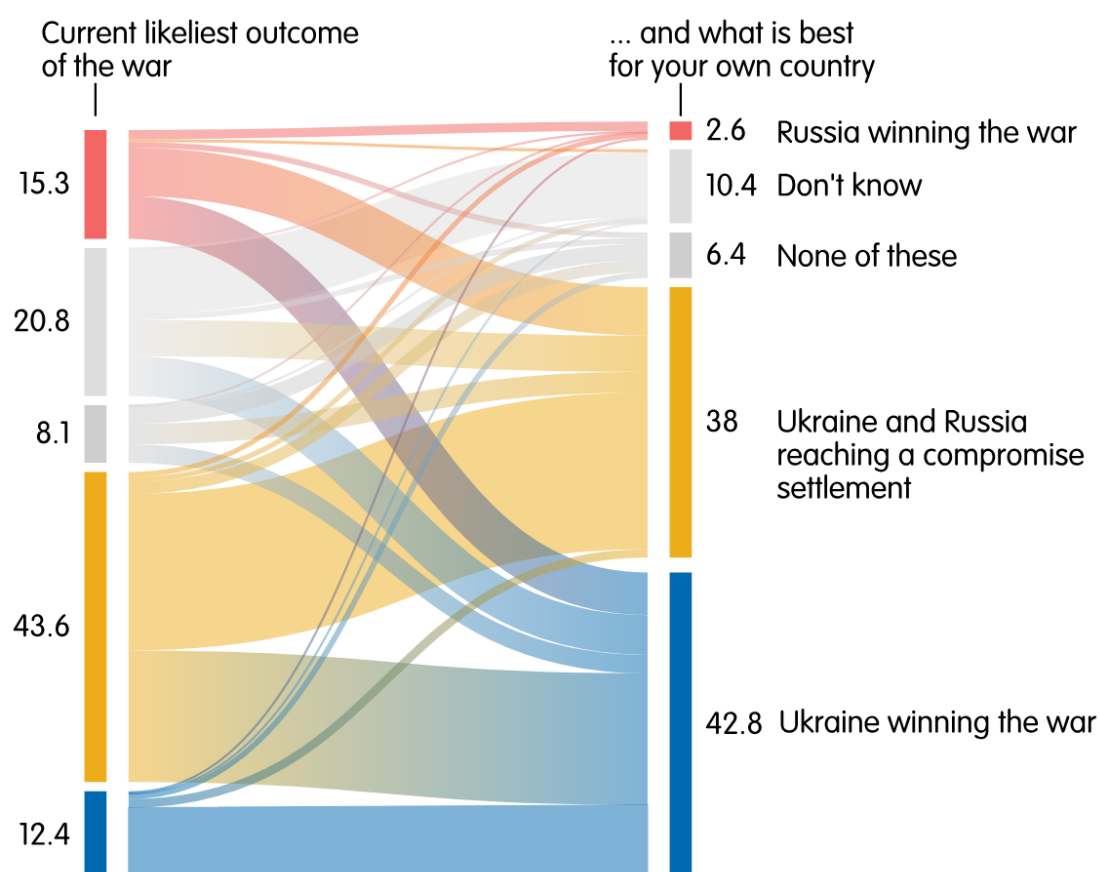
Admittedly, only a minority of respondents believe Trump will reduce the chance of peace in Ukraine; just 26% on average across the 11 EU countries polled. And in several European

countries—not just in generally Trump-positive Hungary, Romania and Bulgaria, but also in Estonia, Italy and Ukraine itself—quite a few people believe that he will make it more likely.

But the overall picture is darker. In several countries, many of those who consider peace negotiations as the “most likely” outcome of the war do not consider this the “best” outcome for their own countries or for peace in the world. The tendency is particularly strong in northern Europe. There, respondents tend to believe that it would be better for Ukraine to win and, consequently, many of them want Europe to support Kyiv to continue fighting instead of pushing it to negotiate.

Current likeliest outcome of the war and what would be best for your country? In per cent

Bulgaria / Denmark / Estonia / France / Germany / Hungary / Italy / Poland / Portugal / Romania / Spain / Switzerland / UK / Ukraine



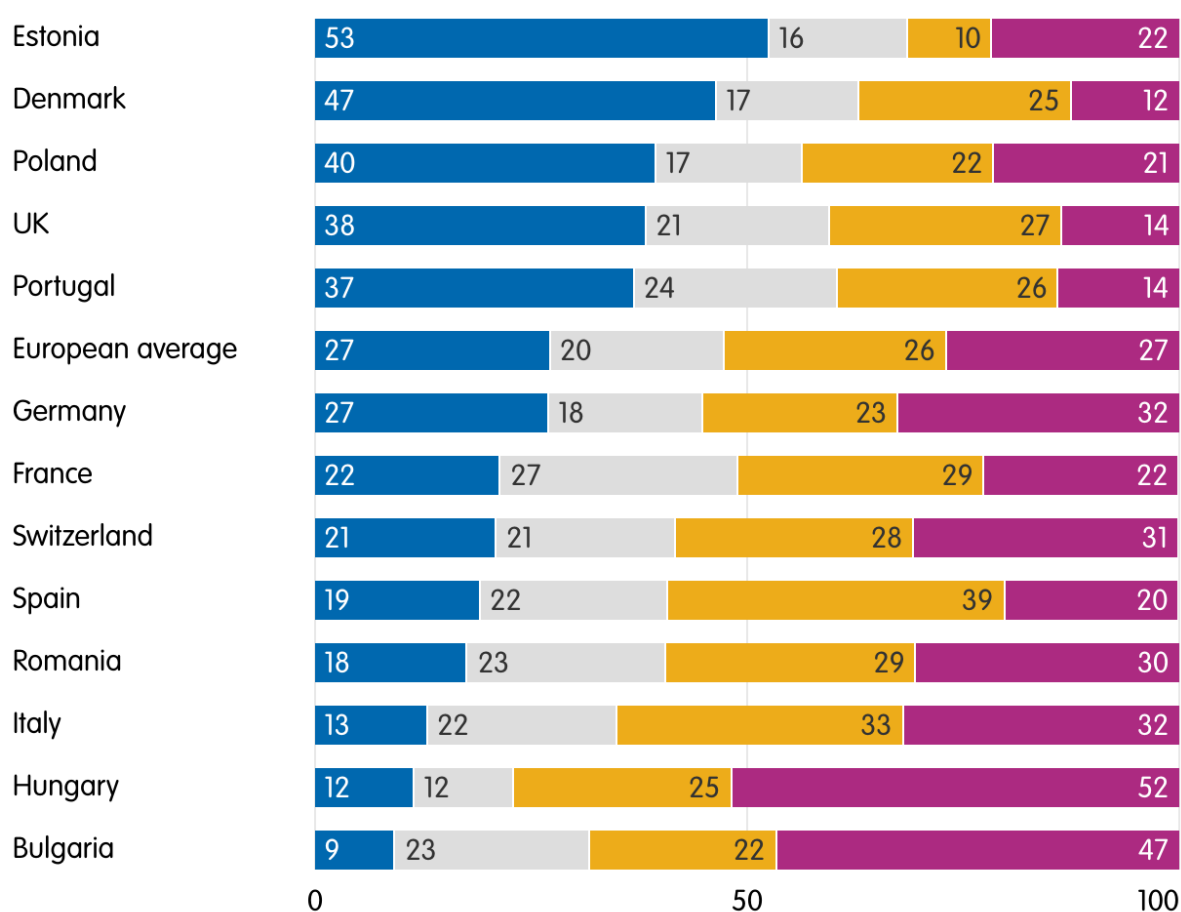
Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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In other words, pluralities (and in some cases, majorities) of respondents anticipate that Russia's war in Ukraine will end in negotiations. But they do not necessarily trust Trump to help with that or to further the wider cause of peace globally. In some cases, they do not believe talks now are even desirable. There is therefore significant potential for transatlantic and intra-European splits, especially if negotiations either fail entirely or drift towards an outcome highly unfavourable to Ukraine.

Within Europe the main rift is between countries that are keen to support Kyiv in continuing its fight (like Denmark, Estonia, Poland and the UK) and those that would rather push it towards peace negotiations. The latter are further divided between a select few (like Spain) where many would prefer to invite Ukraine to NATO first and others (especially Bulgaria and Hungary) where the largest group of respondents would rather push Kyiv to negotiate without such an offer.

Which of the following best reflects your view on what Europe should do about the war in Ukraine more broadly? In per cent

- Europe should support Ukraine in continuing fighting to win back territories occupied by Russia
- None of these, DK or no answer
- Europe should push Ukraine towards negotiating a peace deal with Russia, with a prior offer of Ukraine's NATO membership
- Europe should push Ukraine towards negotiating a peace deal with Russia, without a prior offer of Ukraine's NATO membership



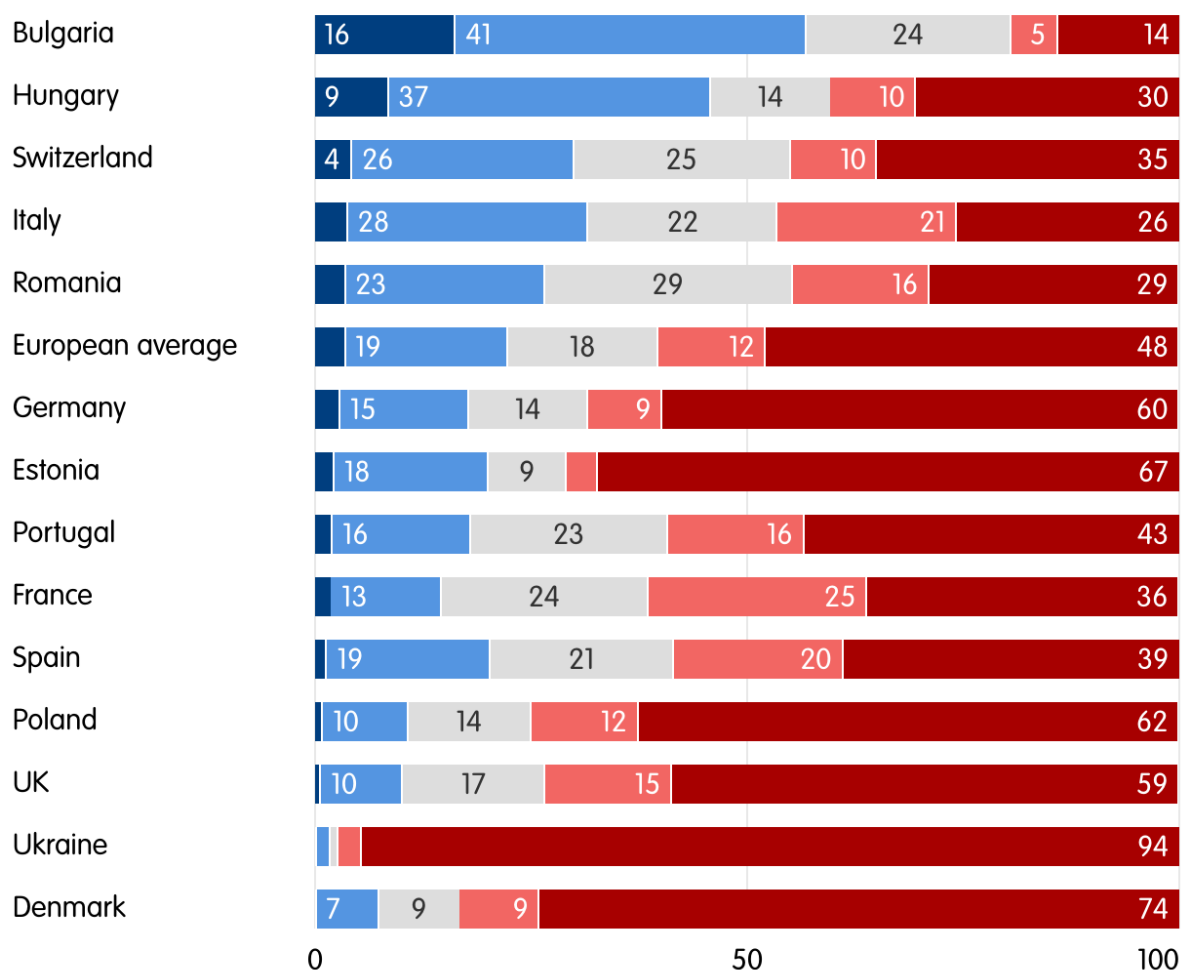
Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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Those divisions should concern anyone who sees the need for a common European position on Ukraine—especially given the arrival of a less predictable and amicable partner in the White House. So too should divides that would matter particularly in the event that a peace deal is indeed reached between Kyiv and Moscow. Poll respondents in some countries (most

notably, Bulgaria and Hungary again) are already fairly Russia-positive and tend to believe that Ukraine bears some, most, or all of the blame for the war's continuation thus far. This points to the possibility that, after any peace deal, those countries' governments would seek a reset with Russia that others (like Poland or Germany) might find unpalatable.

Who is Russia to the EU? In per cent

- An ally – that shares our interests and values
- A necessary partner – with which we must strategically cooperate
- Don't know or no answer
- A rival – with which we need to compete
- An adversary – with which we are in conflict

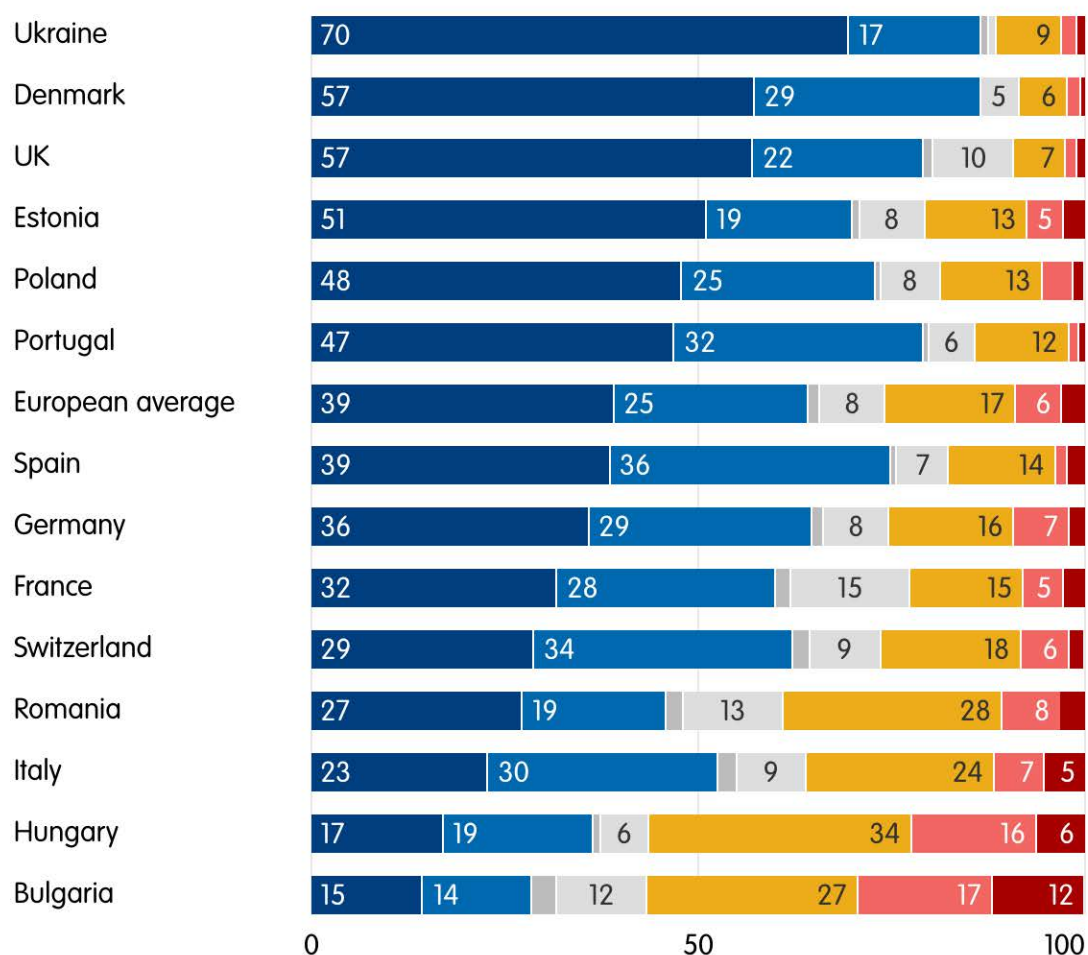


*In the UK, Ukraine and Switzerland, the question asked concerned what Russia was to respondent's country.
Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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Thinking only of Russia and Ukraine, which of these two sides in your view is more responsible for the war in Ukraine continuing?

In per cent

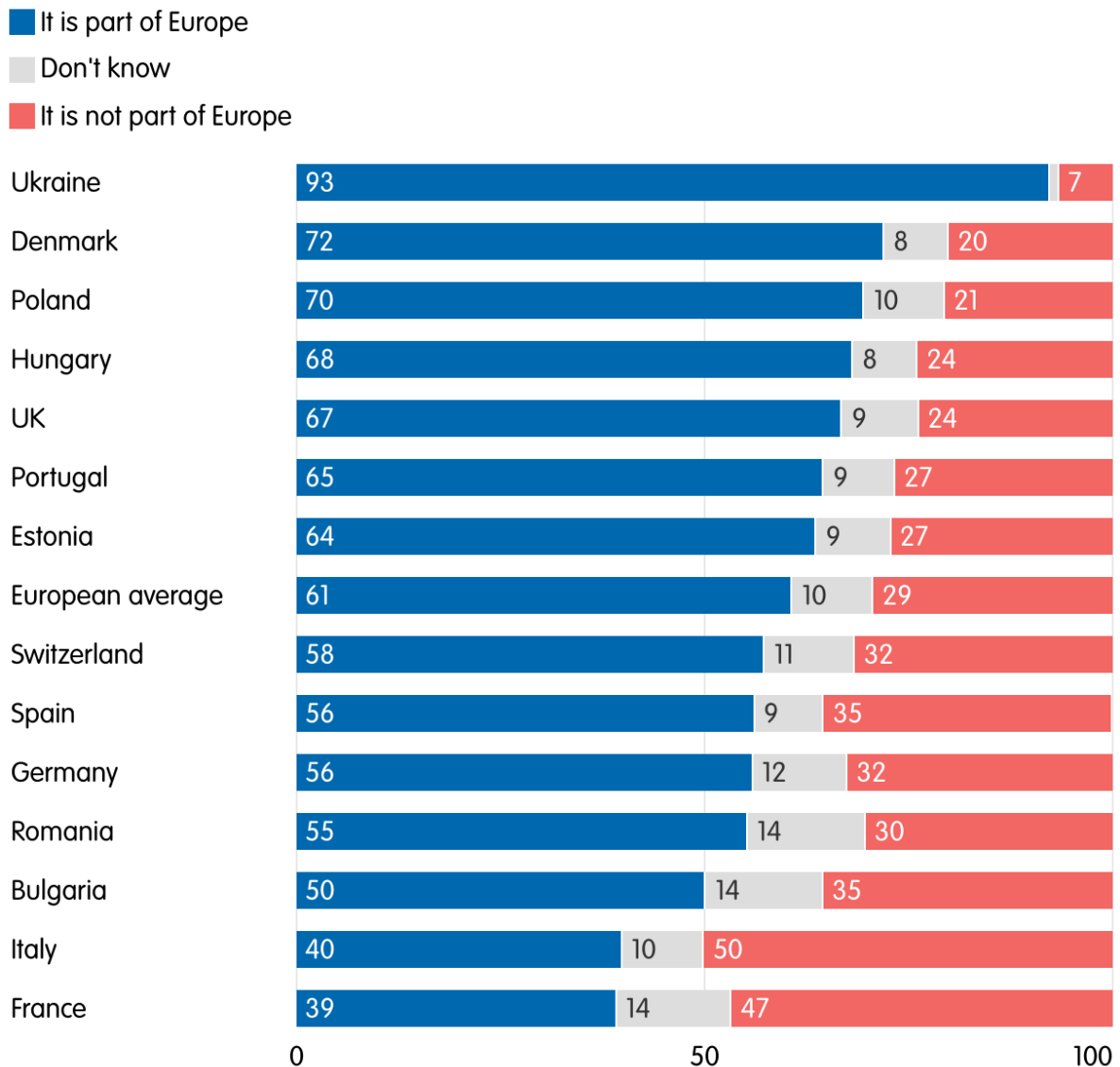
- Out of the two, only Russia is responsible
- Russia is more responsible, although Ukraine has some responsibility
- Neither of these is responsible
- DK or no answer
- Both Russia and Ukraine are equally responsible
- Ukraine is more responsible, although Russia has some responsibility
- Out of the two, only Ukraine is responsible



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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Another question that could arise in that event—if not as part of the negotiations themselves—is Ukraine’s future integration into the EU. There too the scope for division is obvious, with a wide range of views on whether the country is even part of Europe. That around half of respondents even in two big western states, France and Italy, doubt this should be a particular concern to supporters of that integration process.

Is Ukraine part of Europe? In per cent



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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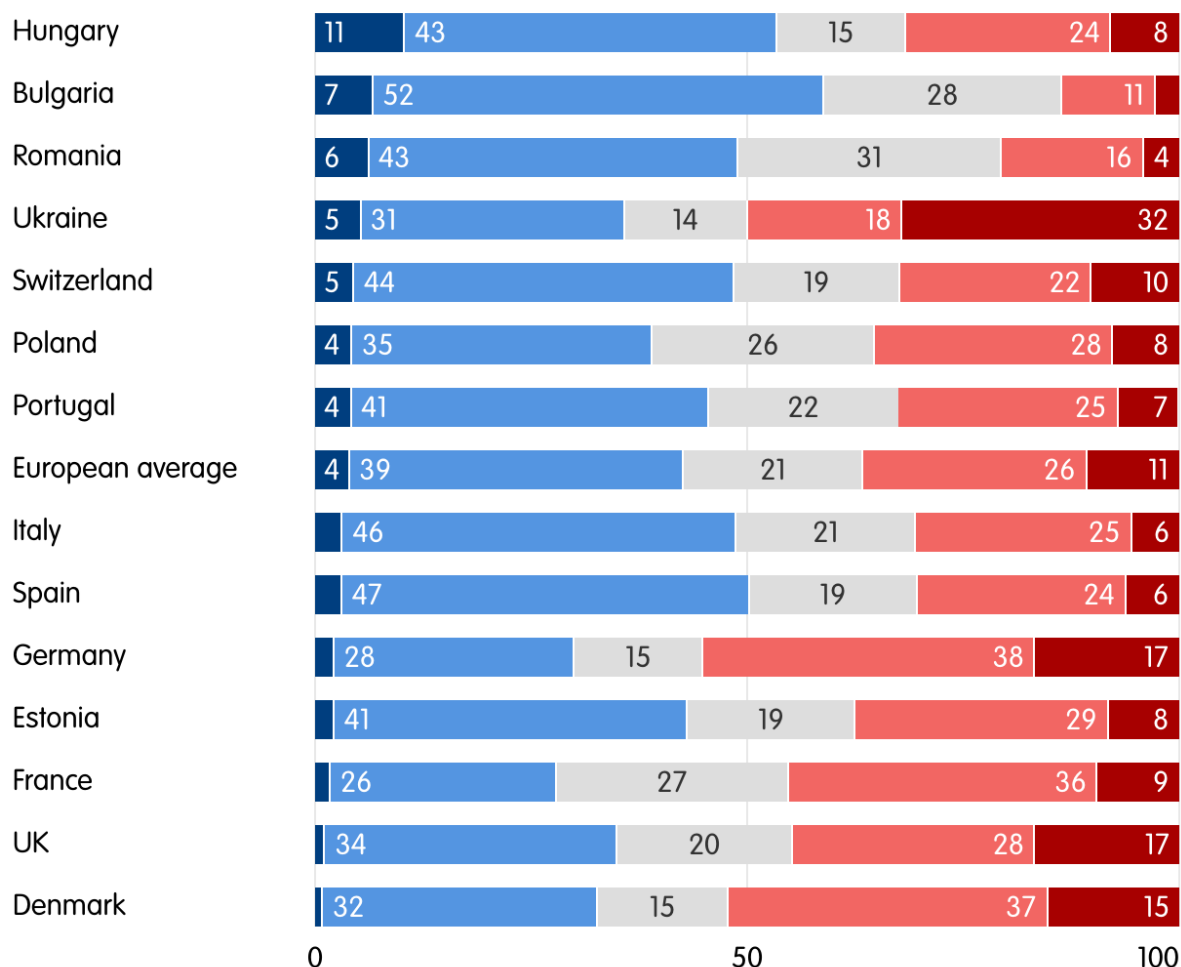
The China conundrum

If the poll makes it all-too-easy to imagine how Europe's divisions over Ukraine could prevent it from establishing common positions towards Trump's Washington, the same could also be true of China. At the time of writing, the president has fired the opening salvo of a new trade war with Beijing, imposing a sweeping 10% tariff on Chinese imports. He is also threatening the EU with tariffs. Does Europe, however unsentimentally, align with the president on China in order to placate him? Or does it turn to China as a new beacon as the transatlantic glow fades?

Our poll suggests that neither course would enjoy resounding support among Europeans. True, a plurality of respondents agree that China is a “necessary partner” more than an ally, rival or adversary. But the proportions vary greatly, with southern Europeans most positive towards it (perhaps a reflection of perceived economic advantages) and northern Europeans more dubious (perhaps the sign of cautionary lessons learned about interdependence with China, especially in Germany's and Denmark's cases.)

Who is China to the EU? In per cent

- An ally – that shares our interests and values
- A necessary partner – with which we must strategically cooperate
- Don't know
- A rival – with which we need to compete
- An adversary – with which we are in conflict



*In the UK, Ukraine and Switzerland, the question asked concerned what China was to respondent's country.
Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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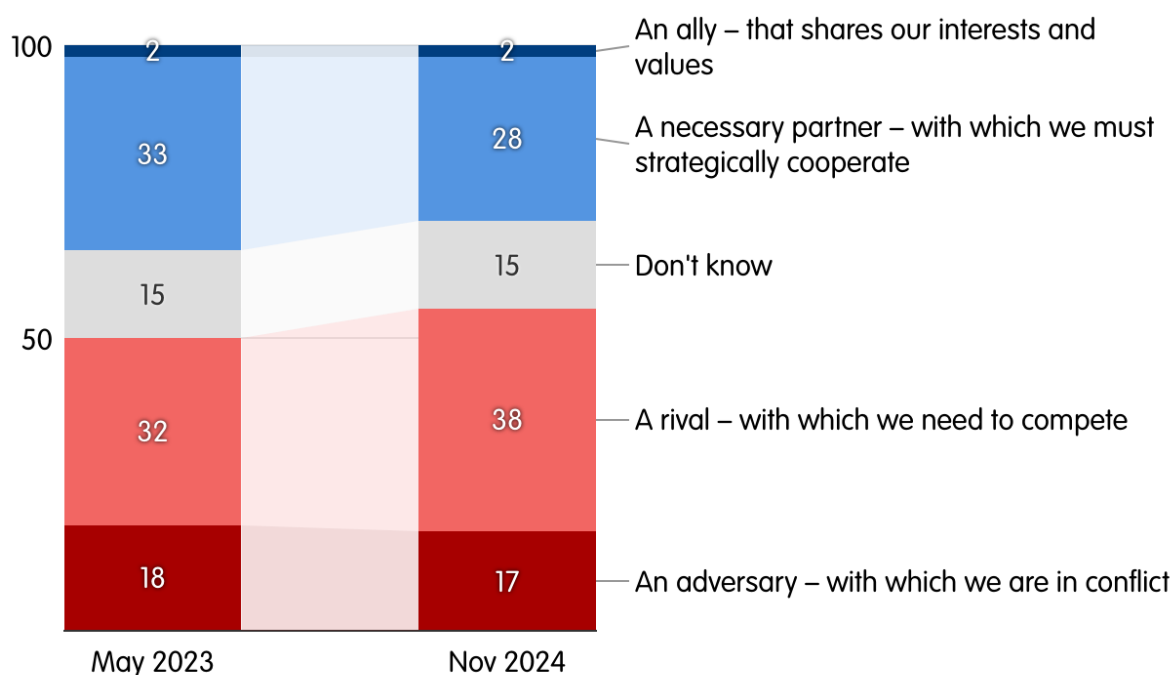
Our poll also finds a slight negative shift in views towards China since May 2023 in countries like Denmark, France, Germany and Poland. That appears to reflect Europe's ongoing reassessment of its relationship with the Asian giant, including a shift in emphasis at the EU level towards "de-risking." At the World Economic Forum summit in Davos on January 21st,

the European Commission president, Ursula von der Leyen, advocated “a more balanced relationship with China” overcoming “economic imbalances.”

Her address evoked a Europe capable of making its own choices on the relationship rather than (implicitly) being pressed into a course of action by either Washington or Beijing.

What is China to the EU? German responses, in per cent

Bulgaria / Denmark / France / Germany / Hungary / Italy / Poland / Spain



In 2023, the question asked concerned China's relations with "Europe".

Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.

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Yet the poll also points to the challenges in doing so if, for example, Trump pressures Europeans to join the US in ratcheting up pressure on Beijing. Some of the most China-sceptic countries are also some of the most Trump-sceptic (though Germans are also divided internally, reflecting the varying interests and outlooks of the country's different industrial sectors). Meanwhile some of those states most open to China, particularly in southern and eastern Europe, are most upbeat about Trump.

Finding a consistent European way forward will therefore be difficult. Even if that middle way involves a transactional bargain—ongoing American security for Europe in return for some European support on China—this will strain elements of public opinion in much of the

continent. The alternative, of course, is that Europe fails to find any such common position and allows others, whether Washington, Beijing, or both, to set its course. Avoiding that will mean preparing, and preparing electorates, for negotiation and compromise.

From gloom to shades of grey

Can Europeans light their own path forward during the era of Trump 2.0? The poll suggests a profound lack of self-confidence. Most respondents are either sceptical of the EU's power, or believe the union could collapse within the next 20 years, or both.

As such, they see the EU in a gloomier light than respondents in most of the rest of the world, as ECFR's recent global polling report showed. Absolute majorities in Brazil, India, Saudi Arabia and South Africa believe that the EU will have much more or somewhat more influence in the world over the next decade. By contrast, that expectation is shared by only 29% in the EU (taking an average across the 11 EU countries polled) and even smaller contingents in the UK and Switzerland.

Expectation that the US, China, and the EU will enjoy much more or somewhat more global influence. In per cent



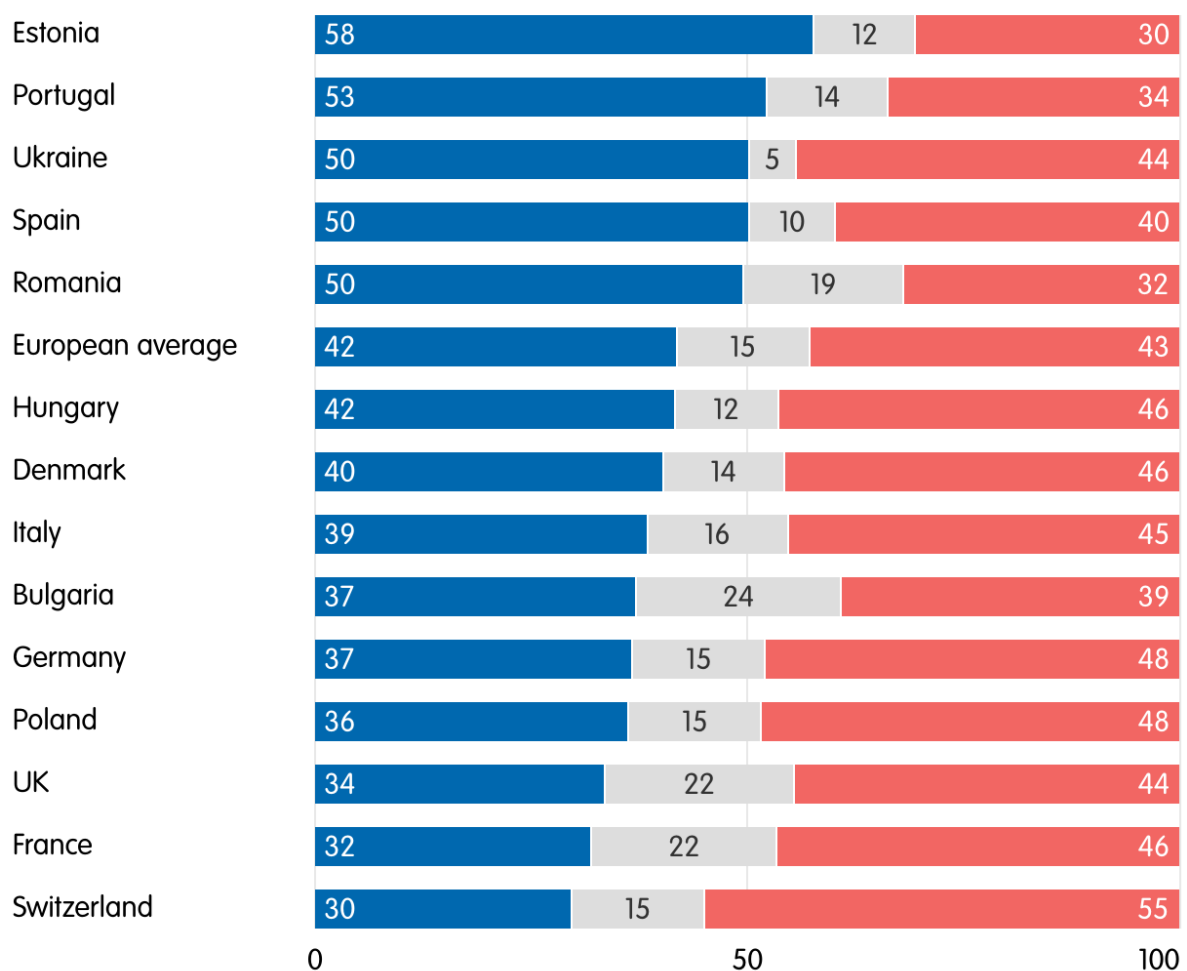
Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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There are, however, differences within Europe. Notably, respondents in geographically marginal states outside the old core of the European project—Estonia, Portugal, Romania and Spain—see the EU’s power shining more brightly than counterparts in France, Germany and Italy.

One possible interpretation of this finding is that newer and (in the past, at least) peripheral members are more likely to see the EU as strengthening their own voices in the world and helping to compensate for the limitations of national governments. Another, more dispiriting interpretation is that Europe's old core is closer to the realities of the EU's limitations and its struggle to reconcile national differences.

Which of the following best reflects your view on the EU's global standing? In per cent

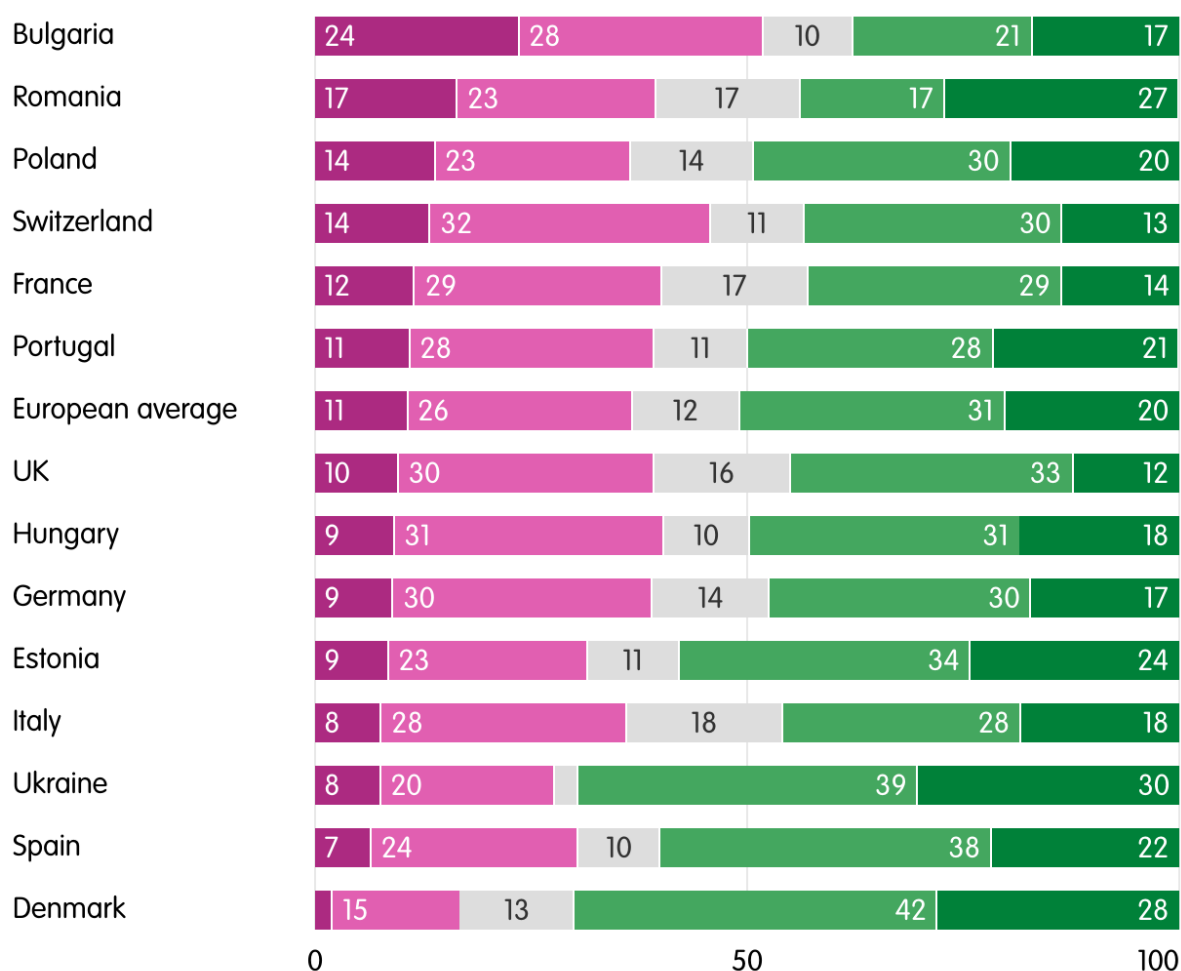
- The EU is a power that can deal on equal terms with global powers, such as the US or China
- The EU is NOT a power that can deal on equal terms with global powers, such as the US or China
- Don't know or no answer



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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How likely is it that, in the next 20 years, the EU will fall apart? In per cent

- Very likely
- Fairly likely
- Don't know
- Fairly unlikely
- Very unlikely



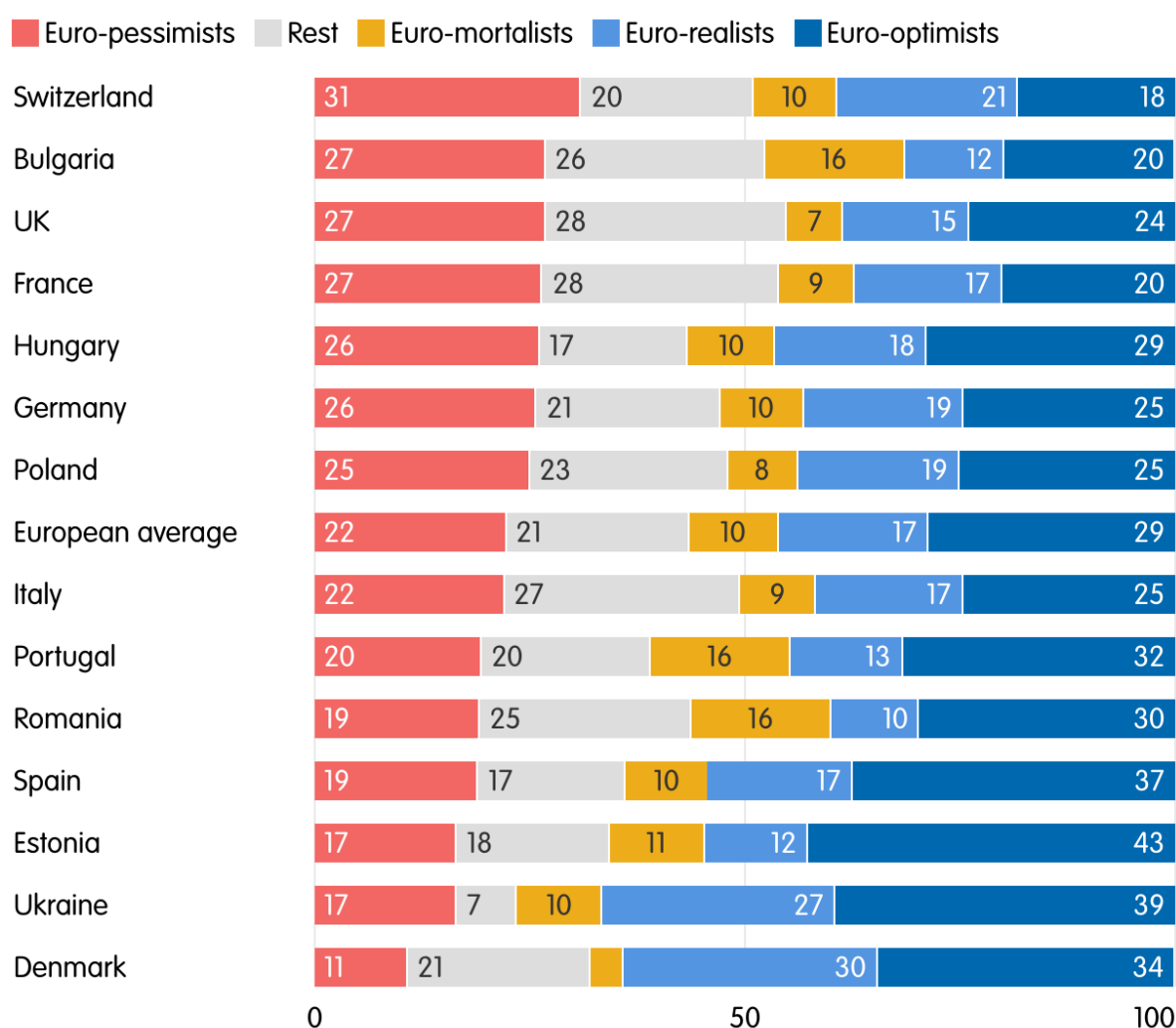
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To capture fully this complex picture, it helps to segment European citizens into four different groups reflecting their views of both the EU's resilience and its great-power potential.

Those who believe that the EU is a great power, and that its collapse is unlikely, are the largest camp, constituting 29% of the public, on average, in the 14 European countries polled. This group is particularly big in Denmark, Estonia, Portugal and Spain. Only in one country, France, does its size fall below 20%. We call these citizens “**Euro-optimists.**” They dominate in the electorates of Macron’s Renaissance, Spain’s governing PSOE and its opposition Popular Party (PP), and the German Greens. But taken alone, this group’s sunny disposition would not be enough to light the EU’s way.

The second-largest camp (22% on average) sees shadows consuming the union. It comprises those believing that the EU both is not a power and is doomed to collapse. We call them the “**Euro-pessimists.**” They are preeminent in the electorates of some of the most radical far-right or otherwise Eurosceptic parties, like the AfD, RN, PiS, Confederation, as well as Orban’s Fidesz, and Vox in Spain. In five EU members from our sample—Bulgaria, France, Germany, Hungary and Poland—they make up at least a quarter of the national population.

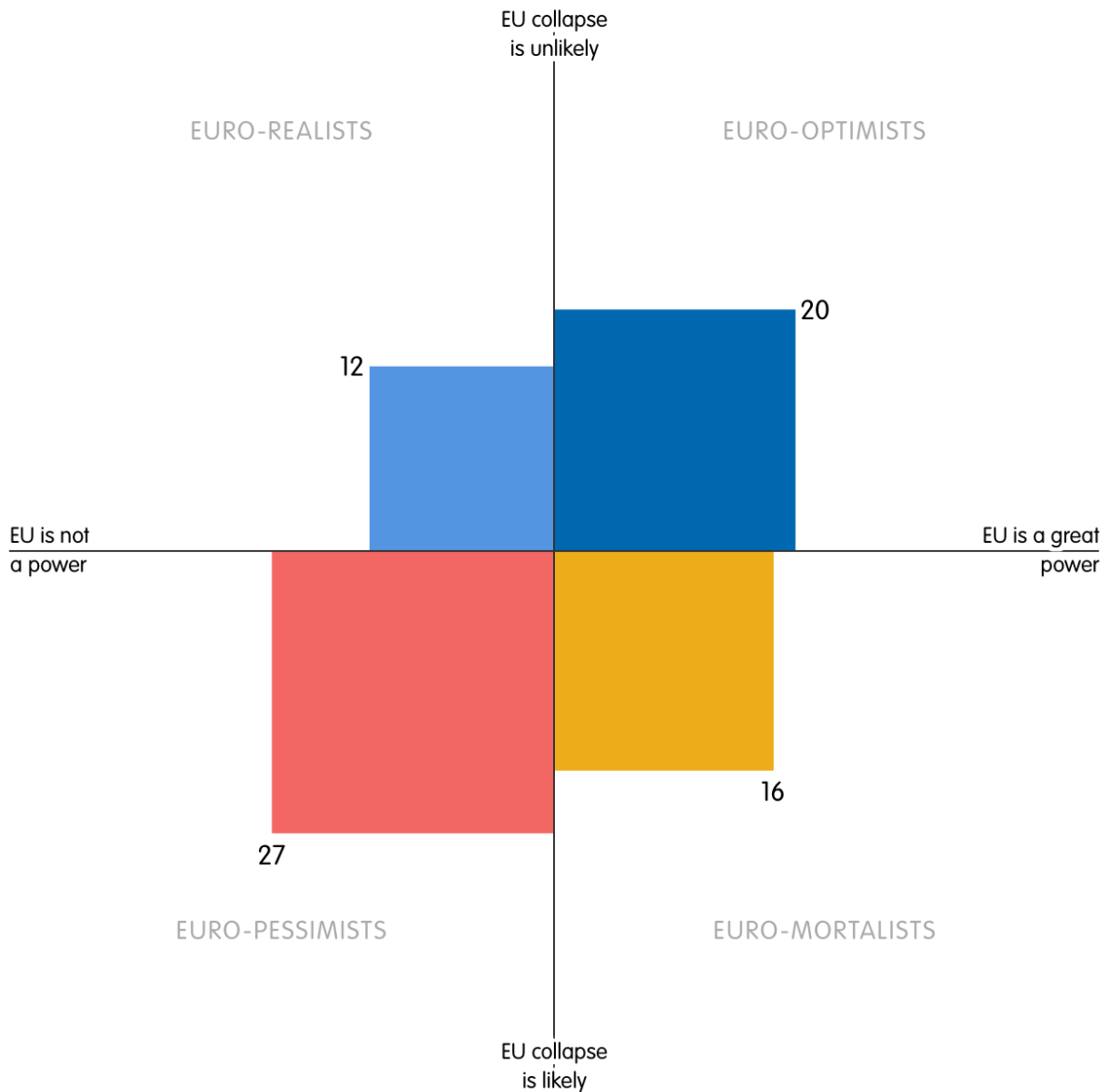
The EU's four camps. By share of national population, in per cent



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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Bulgaria: EU's four camps. By share of national population, in per cent

Bulgaria / Denmark / Estonia / France / Germany / Great Britain / Hungary / Italy / Poland / Portugal / Romania / Spain / Switzerland / Ukraine



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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Between the bright outlook of the Euro-optimists and the despondency of the Euro-pessimists are two groups that need to be taken into consideration and that reflect different combinations of light and shade.

Members of the third camp, the “**Euro-realists**”, have perhaps the least dramatic perspective.

They do not think the EU is bound to collapse, but do not see it as a great power either. On average, they account for one sixth (17%) of the population in the European countries polled, and are particularly present in Denmark, Germany, Italy and Poland. This group is rarely ever the single-largest camp among any one political party's electorate. But it is a significant contingent in several of the most powerful parties in the EU, from the CDU and SPD in Germany to Meloni's FdI and Donald Tusk's Civic Coalition in Poland.

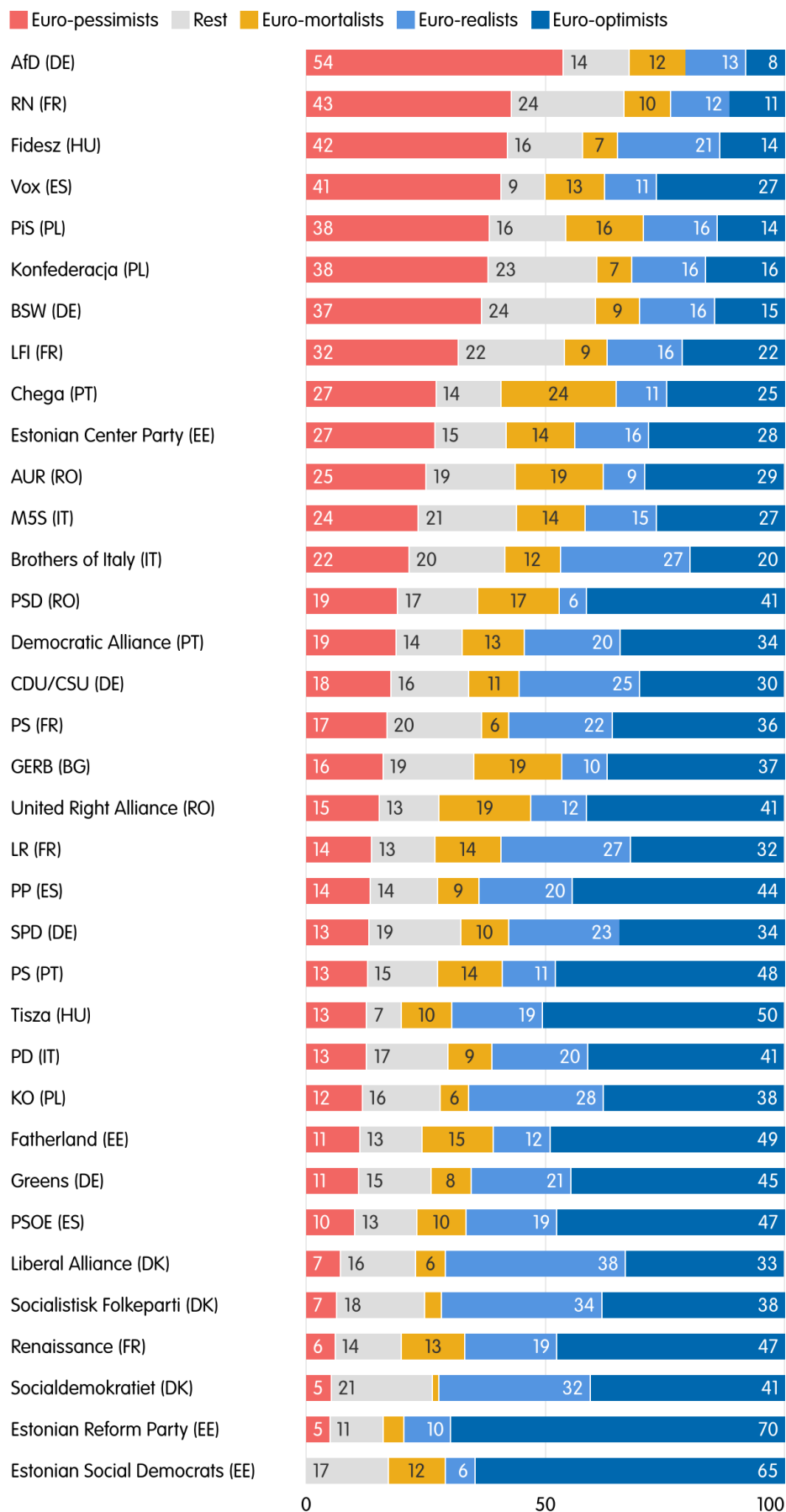
Unlike the Euro-pessimists, many of the Euro-realists believe the EU's power will grow in the future. This might suggest that, for them, the EU is simply not a great power yet. Alongside "Euro-optimists", they are often (especially in Germany, Poland and the UK, among others) of the opinion that Europe should support Ukraine in continuing its fightback against Russia rather than pushing for peace talks.

The fourth camp, which we call "**Euro-mortalists**", is a mirror image of the Euro-realists. It is composed of people who believe the EU is vulnerable to collapse but, at the same time, view it as a great power comparable to the US or China. They are thus likely to agree with Macron when he warned at the Sorbonne in April 2024 that the EU is mortal and could die, because its geopolitical awakening is too slow and weak amid the "generalised rearmament of the world". This group accounts, on average, for 11% of the European populations polled, with particularly high numbers in Bulgaria, Portugal and Romania. But they do not dominate in any country or party.

Identifying these shades of grey may help Europeans avoid shades of Grey (he of the catastrophist "lamps going out" observation in 1914). In other words, as twilight settles over the transatlantic relationship and neither luminous boosterism nor the darkest fatalism offer viable ways forward, the nuances of the Euro-realists and Euro-mortalists may help light that path. By drawing them together with those Euro-optimists most confident about Europe's future, pragmatic leaders can build broad majorities in favour of concerted action.

Hopeful but grounded; aware of the limits of European power but not imprisoned by them; cognisant of the EU's mortality but not transfixed by it: such nuances show the way. In a speech to France's ambassadors on 6th January 2025, Macron warned against succumbing to a "spirit of defeat". This is as much of an imperative—avoiding Europe succumbing to its own shadows—as his earlier warning about the eventual death of the EU. The answer is found in reconciling the two.

The EU's four camps. For the main parties in 11 EU countries polled. By voter intention, in per cent



Source: Survey conducted in November and December 2024 by Datapraxis, YouGov, Norstat, and Rating Group.
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Glimpses of a new dawn

If Grey's "lamps going out" comment resonates today, that is not necessarily because the world is on the brink of war, even though escalating conflict and big-power rivalry are a significant part of the crepuscular backdrop. More precisely, it captures the sense of the lights going out on a fading order born on the second world war battlefields of Europe and enshrined in the North Atlantic Treaty of 1949. For decades, leaders on both sides of the Atlantic have subscribed to the form—and broadly, the substance—of a values-based partnership of committed allies with deep shared interests.

Donald Trump, along with the wider shift away from established Western liberalism, is putting an end to all that. Already in his first term in office he referred to the EU as a "foe" and Brussels as being "like a hellhole". Since then, his willingness to tear up institutional conventions and norms has only grown. His "America first" designs on Greenland, his demand that NATO partners spend 5% of GDP on defence and his moves towards unilateral trade tariffs (initially on others, seemingly with the EU up next) all confirm it. Darkness does indeed seem to be falling for some as-yet indeterminate period stretching into the future.

This paper has made one argument with two sides. On the one side, it has made the case for recognising that the old transatlantic light is failing; that interests and values in America and Europe are diverging and that romantic notions about the Atlantic community have had their day. It has shown that European publics recognise that—whether they regret this or, in the case of Europe's own rising radical right especially, view it as a positive.

On the other side, we have argued for seeing the light and shade. Europe's future is not uniformly dark, it is not doomed to succumb to Trump's will, and the continent has a reasonable degree of agency over what comes next. America's president sees everything as negotiable, so Europeans need to be ready to negotiate hard in support of their interests—on Russia and Ukraine, Europe's disposition towards China, or its wider security and prosperity.

Readers should take away from this paper a sober sense of the deep divisions the polling exposes, and their vulnerability to exploitation by a Trump administration whose disdain for European cooperation and integration is obvious. The risks of bilateralised relations, fragmentation, and even paralysis are real. Leaders should guard against them assiduously rather than seeking short-term gains by, for example, breaking with common European positions. No European country has the strength to deal on equal terms with the US administration. And European political and economic interests are so interlinked that one country's problems will almost inevitably become problems for others, too.

But it is on the opportunities, those bright spots in the darkness, that this paper concludes. ECFR's polling shows room for collaboration across a broad coalition of voters that see Europe's power and resilience (as well as its relationships with the US and China) in somewhat different ways, but not without hope. By bringing together Euro-optimists, Euro-realists and Euro-moralists especially, leaders can rally together those Europeans with at least some degree of faith in the project.

The weeks since Trump's second election win have brought glimpses of European leaders, in Brussels and national capitals alike, grasping towards those coalitions.

The French, German and Polish governments—whose political bases are dominated by “Euro-optimists” and “Euro-realists”—have started exploring new diplomatic formats based on their “Weimar triangle”, but also taking in Italy and in some cases Spain. Poland, the Nordic countries and the UK are working towards a coalition of forces aimed at sustaining Ukraine's fightback. Even Meloni has declared herself willing to play a constructive bridging role between a demoralised Europe and an antagonistic Trump on topics like tariffs.

A new emphasis on ambitious but hard-nosed collective action also marks recent interventions by EU leaders and upcoming developments like the European Commission's white paper on defence. Speaking in Davos, von der Leyen announced that the EU would be pragmatic towards Trump's US, but would “always stand by our principles; to protect our interests and uphold our values.” Antonio Costa, the new European Council president, has told the EU ambassadors that “despite geopolitical challenges, this is not a world for us to despair, but a world with opportunities for the European Union.”

Their contribution, as well as that of Mark Rutte as NATO secretary general, will be vital to shaping European responses alongside national leaders.

The transatlantic twilight is a moment of opportunity and clarification. It forces European leaders to relearn the art of pragmatism in foreign policy. It allows them to clarify to their voters the stakes associated with the different kinds of peace for Ukraine, and with Europe's excessive dependency on the US for security. And it may let pro-European parties renew their bonds with voters by distinguishing themselves from the Trumpian far-right. All of that, however, will require a mix of practicality and creativity.

It also allows Europeans to take the lead in moulding a new transatlantic relationship. This might well be less ideals- and values-based than what came before, and more based on calculations of concrete benefits. It will probably be a more distant one, in which Europe must more often defend its interests when they come under pressure from American actions.

And it will certainly need to be one with more European leadership, initiative and responsibility for the continent's own fate. There is not just peril but also possibility in this reset. The twilight can yet become a new dawn.

Methodology

This report is based on a public opinion poll of adult populations (aged 18 and over) conducted in November 2024 in 14 European countries (Bulgaria, Denmark, Estonia, France, Germany, Hungary, Italy, Poland, Portugal, Romania, Spain, Switzerland, Ukraine and the United Kingdom). The overall sample included 18,507 respondents.

The polls were conducted by Datapraxis and YouGov in Bulgaria (1,014; 7-29 November); Denmark (1,099; 7-26 November); France (2,017; 7 November-2 December); Germany (2,003; 7-28 November); Hungary (1,023; 7-28 November); Italy (1,531; 7-29 November); Poland (1,063; 7-29 November); Portugal (1,000; 7-27 November); Romania (1,010; 7-26 November); Spain (1,030; 7-27 November); Switzerland (1,082; 8-26 November), and the UK (2,073; 7-26 November). Polls were conducted by Datapraxis and Norstat in Estonia (1,061; 11 November – 5 December); and by DataPraxis and Rating Group in Ukraine (1,501; 15-20 November).

In Ukraine, polls were conducted by DataPraxis and Rating Group (1,501; 15-20 November) via telephone interviews (CATI), with respondents selected using randomly generated telephone numbers. The data was then weighted according to basic demographics. Fully accounting for the population changes due to the war is difficult, but adjustments have been made to account for the territory under Russian occupation. This, combined with the probability-based sampling approach, strengthens the representativeness of the survey and generally reflects the attitudes of Ukrainian public opinion in wartime conditions.

The segmentation into different “EU camps” used in this paper is based on responses to two questions:

- “Which of the following best reflects your view on the EU’s global standing?” (a) The EU is a power that can deal on equal terms with global powers, such as the US or China; (b) The EU is NOT a power that can deal on equal terms with global powers, such as the US or China; (c) Don’t know
- “Looking ahead, how likely do you think it is that in the next twenty years the European Union will fall apart?” (a) Very likely, (b) Fairly likely, (c) Fairly unlikely, (d) Very unlikely, (e) Don't know

Respondents were sorted into four different categories based on the following criteria:

- “Euro-optimists”—if they consider the EU a power and think it’s unlikely to fall apart
- “Euro-pessimists”—if they consider the EU as NOT a power and think it’s likely to fall apart
- “Euro-realists”—if they consider the EU as NOT a power but think it’s unlikely to fall apart
- “Euro-mortalists”— if they consider the EU as a power but think it’s likely to fall apart

The remaining respondents—who responded “Don’t know” to at least one of the two questions—were not put into any of these five categories, and were instead considered as “The rest”.

The image for this text was created with the help of ChatGPT, an artificial intelligence platform.

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Despite these many and varied contributions, any mistakes remain the authors' own.

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After the authors identified a weighting error following publication, they corrected figures in the chart titled “Is achieving peace in Ukraine more or less likely under Trump?”

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