

# **THE EUROPEAN ARCHIPELAGO: BUILDING BRIDGES IN A POST-WESTERN EUROPE**

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## **SUMMARY**

- One year into the second Trump presidency, a major ECFR poll finds that most Europeans are pessimistic about their countries' and the world's future.
- Many are realistic, as well: majorities and pluralities believe that greater defence spending is needed and recognise that the US is no longer an ally. However, those groups only partially overlap.
- The European public thus resembles an archipelago, each island comprising a different combination of opinions on defence, America and the EU itself.
- The question is how to bridge the islands to form majority coalitions for action. Three main ones are evident: the “bayonet coalition” agrees on stronger European militaries; the “values coalition” is focused on European cooperation; and the “Eurosceptic coalition” is united in its disapproval of the EU.
- Of these, the values coalition is the preferable formation for as long as it remains arithmetically viable.

# Surveying the landscape

Pick up a telescope in any European capital. Climb to the top of the nearest hill, castle or tower and look out over the landscape. You will notice some people readying themselves for battle. You will see others celebrating the prospect of chaos and disruption. Some will be waving flags; lots of national ones, some European ones, perhaps even one or two American ones. And you will recognise plenty of groups looking decidedly uncertain about what to do next.

This paper goes to press in the immediate aftermath of the US administration openly contemplating the annexation of Greenland; a territory of Denmark, America's NATO ally. It comes after a year that brusquely stirred Europeans from their post-cold war slumber. Confronted by myriad challenges—Russia's aggression, China's economic competition and Donald Trump's bullying, to name but three—they must suddenly ask themselves the most rudimentary questions afresh. Are they secure? Who are their allies? Should they prepare for war? Could the EU collapse? Is Europe bound to decline—economically, politically, culturally?

ECFR's latest public opinion poll, conducted in November 2025 in 13 European countries (full methodology here) confirms the dismal state of the European morale. Already before the brutish beginning of 2026, marked by the US raid on Caracas and its aggressive posturing on Greenland, the 16,393 Europeans polled were feeling pessimistic about the future of the world and that of their own countries. They were worried (even more so than six months ago) that there might be a major new European war and even that Russia might attack their country. They doubted 2026 could bring an end to the war in Ukraine. And they had limited confidence about the EU's future global influence as well as the bloc's potential to lead in the most advanced technologies—where China's star is shining bright.

But all that is just the context, not the focus, of this paper. Readers can explore the above-cited results at ECFR's freshly updated Data Collection website. This brief concentrates instead on the political conditions necessary to drive Europe out of its slump.

It starts by observing that, in at least two respects, European citizens have already demonstrated a sober assessment of their global situation. Most realise the US can no longer be considered a reliable ally. Most also accept the need for stronger defence. The problem is that those two elements of what one might call Europe's "geopolitical awakening" are not just unevenly distributed across the continent but also constitute distinct, only partly overlapping groups of citizens. Europeans are divided, both inside and between countries, and this requires leaders to think hard about possible coalitions and the stories they must tell to forge them.

Borrowing a metaphor from Jérôme Fourquet, a French pollster and political analyst who has written of the “archipelago” of views in his own divided country, this paper argues that Europeans currently resemble an archipelago of different mindsets. Only a minority fully share the views that are needed to build a stronger Europe: recognition that the US can no longer be fully trusted, support for more capable and independent European defence, and a positive demeanour towards the role of the EU. Most Europeans differ from that assessment in one or more of its three dimensions.

This paper identifies six “islands” of European public opinion on those topics and uses those to propose majority coalitions for the action needed. It suggests narratives could help link those islands together. And it concludes that the only alternative to this coalition-building would be to let the internal and external enemies of Europe dominate the map—with terrible consequences.

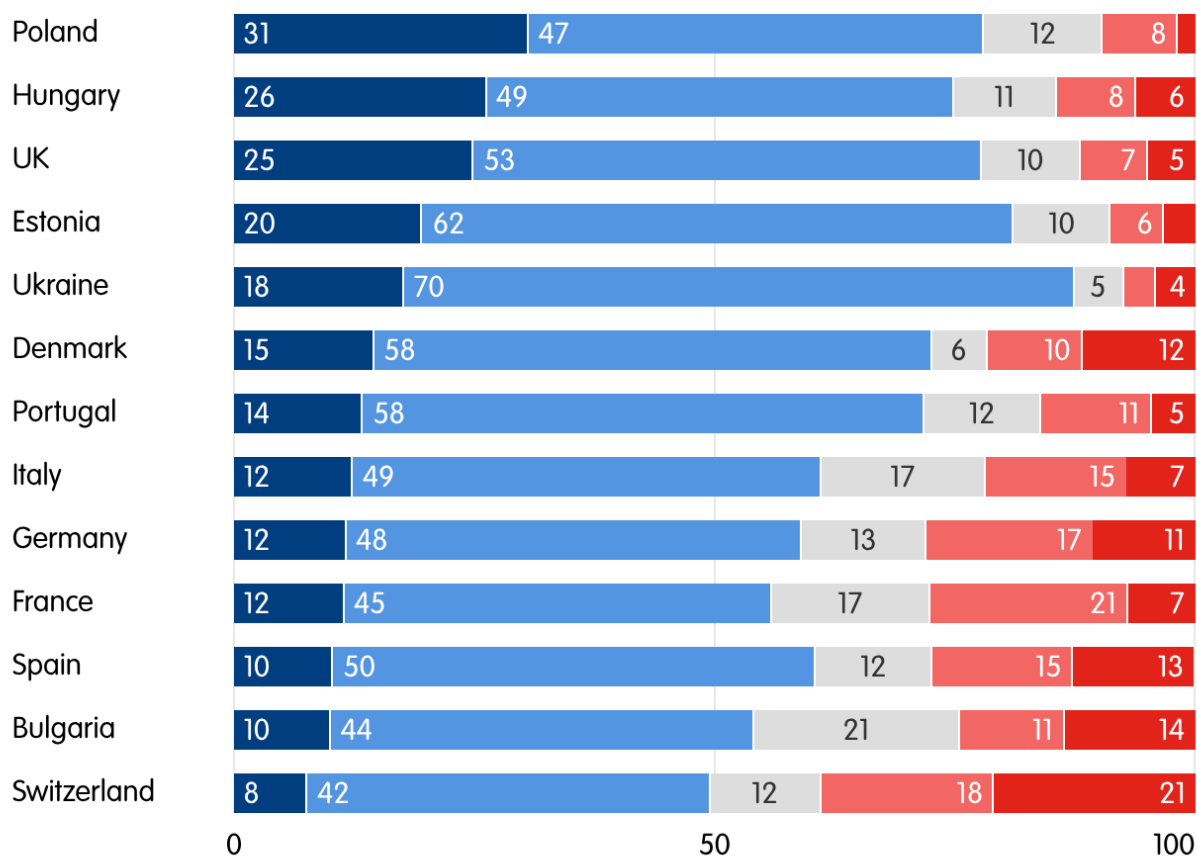
Climb that European tower. Look through that telescope. Survey that landscape. As clouds darken and fires spread, the enormity of the task ahead demands robust public backing for pro-European leaders’ actions. Those leaders need to be able to bring together fragmented and disparate groups of voters. That, in turn, demands invigorating stories capable of building bridges across the archipelago.

## An à la carte awakening

To start on a positive note, many of ECFR’s European poll respondents demonstrate a certain realism about the moment.

## Which of the following best reflects your view on what the US is to the EU\*? In %

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



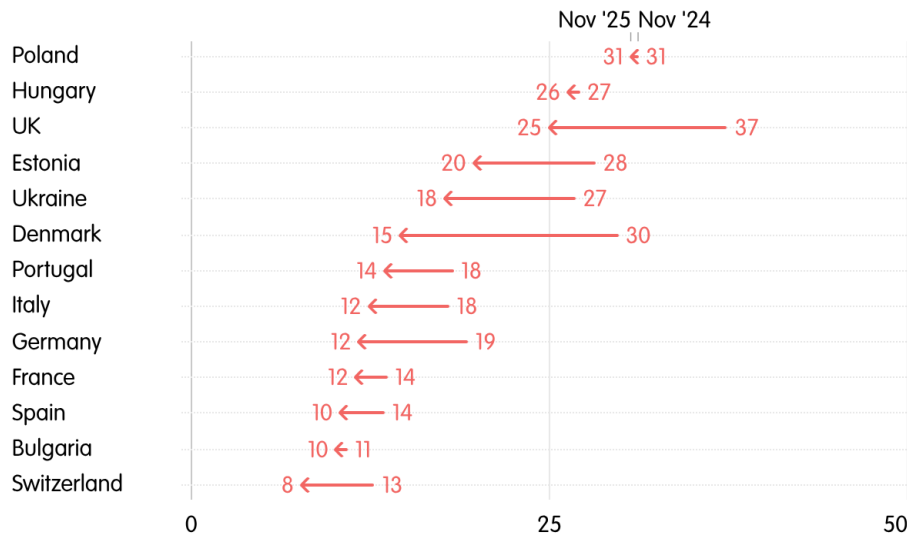
\*In Ukraine, the UK and Switzerland the question concerned the US's relationship "to their countries".

Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.

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First, most grasp the US can no longer be considered a reliable ally. Across Europe, perceptions of the superpower have further deteriorated since November 2024, when Trump was re-elected. The most-shared perspective in each country, even in traditionally NATO-loving Denmark, Poland and the UK, is that the US is only a “necessary partner” rather than “an ally that shares our interests and values”. That puts it roughly on a par with India, Turkey or even China. In some countries—including Bulgaria, France, Germany, Spain and Switzerland—a quarter or more of the respondents consider the US as a rival or even an adversary.

**Which of the following best reflects your view on what the US is to the EU\*? “An ally – that shares our interests and values”, in %**

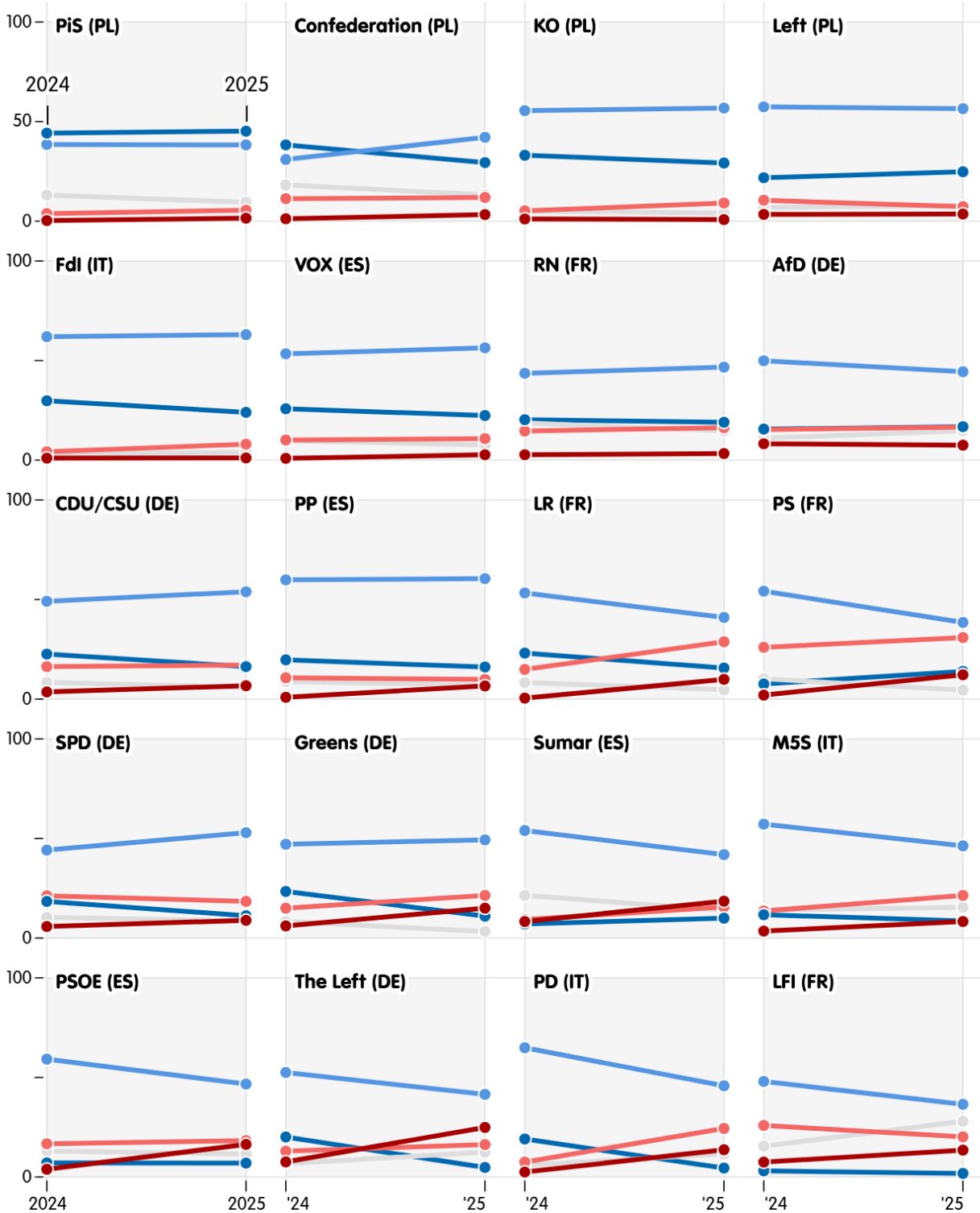


\*In Ukraine, the UK and Switzerland the question concerned the US's relationship "to their countries".  
 Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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Only in some countries—Hungary, Poland and the UK—does this issue strongly divide the public. Three Trumpist parties in those places—Fidesz, Law and Justice (PiS) and Reform UK—are Europe’s main outliers. Many of their voters still see the US as the EU’s (or, in the UK’s case, “their country’s”) ally. But this perspective is not widely shared by supporters of other European new-right parties, including the Alternative for Germany (AfD), Brothers of Italy (FdI) and the National Rally (RN) in France. Views on the US have hardly shifted in those three electorates, despite an eventful year and MAGA’s vocal ambitions to bring them closer to its orbit. Moreover, some such parties’ voters (for example, those of the AfD or FdI) have become more critical of what Trump means for American voters than they were a year ago.

# Which of the following best reflects your view on what the US is to the EU? By voter intention for the main parties in France, Germany, Italy, Poland and Spain, 2024 v 2025, in %

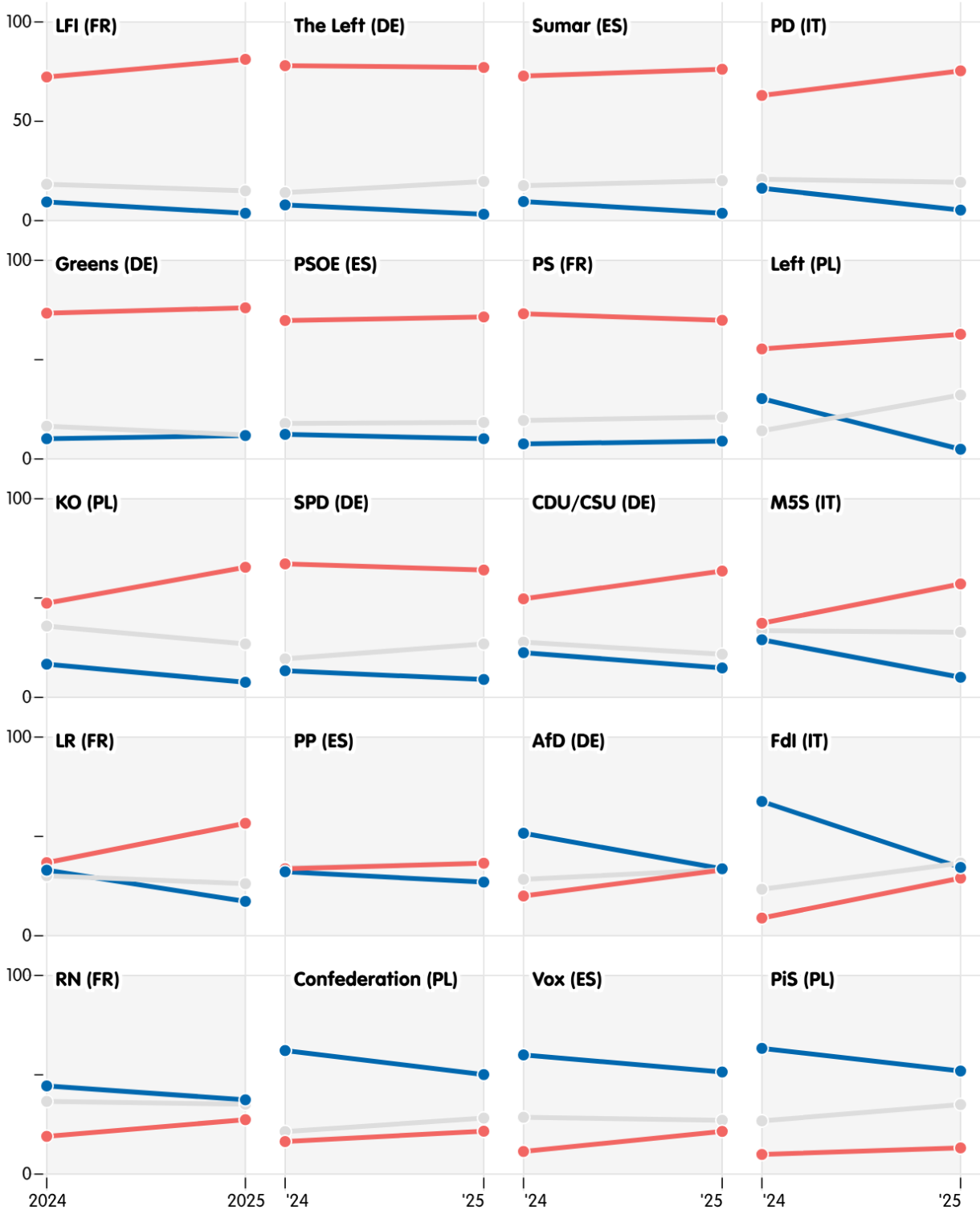
● Ally ● Partner ● Rival ● Adversary ● Don't know



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
ECFR · ecf.eu

# Was Donald Trump's victory in the US presidential election a good or bad thing for American citizens? By voter intention for the main parties in France, Germany, Italy, Poland and Spain, 2024 v 2025, in %

● Bad or very bad thing ● Good or very good ● Neither or don't know

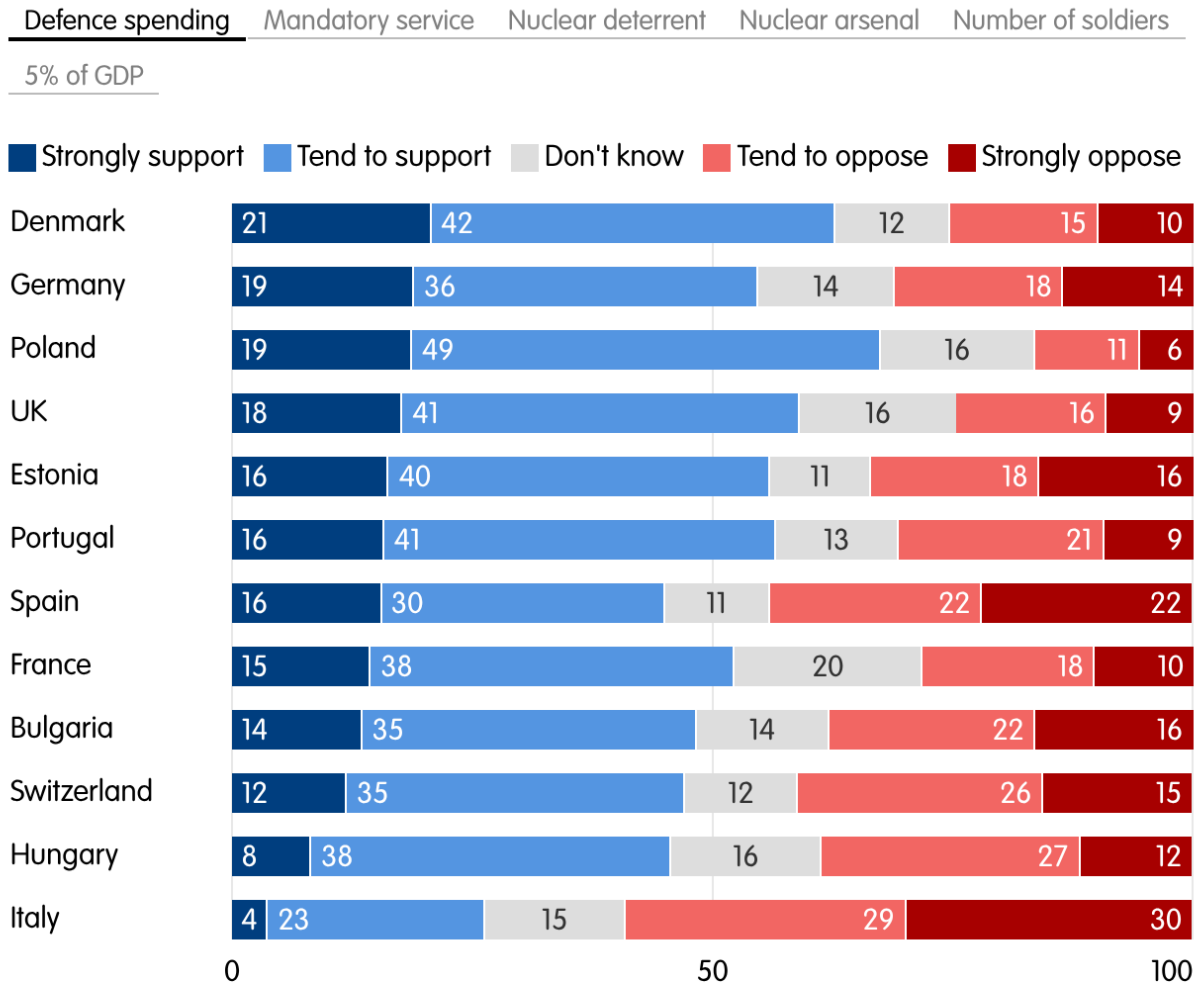


Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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The second aspect in which many respondents display realism about Europe's predicament concerns their support for various forms of military build-up. These include increased defence spending, the re-introduction of mandatory military service and even the development of a European nuclear deterrent. In France and the UK the equivalent question concerned expanding the already-existing nuclear arsenal—a measure which most French respondents backed, unlike their British counterparts.

To be sure, the answers to the defence questions in ECFR's poll were less stark than those to questions about relations with the US. In some countries respondents were split on military questions (for example, in Spain) or even largely opposed to more spending (for example, in Italy). Nonetheless, it was still striking that majorities in Denmark, Estonia, France, Germany, Poland, Portugal and the UK supported increased national defence spending; and that majorities in Bulgaria, France and Germany favoured re-introducing mandatory military service (which already exists in countries like Denmark, Estonia and Switzerland).

## Would you support or oppose your country increasing national defence spending at the current time? In %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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But leaders tend to look for firm majorities on which to base their policymaking. There, ECFR's poll results present a more concerning finding. The groups of Europeans who are clear-eyed about Trump's America and support stronger defence do not neatly overlap. Many align with only one or the other of these points of recognition; being supportive of defence spending while remaining too sanguine about America; or being realistic about America but unpersuaded of the defence investments that would make Europe truly autonomous. Europe's geopolitical awakening has therefore been à la carte—with Europeans drawing different conclusions from a shared experience.

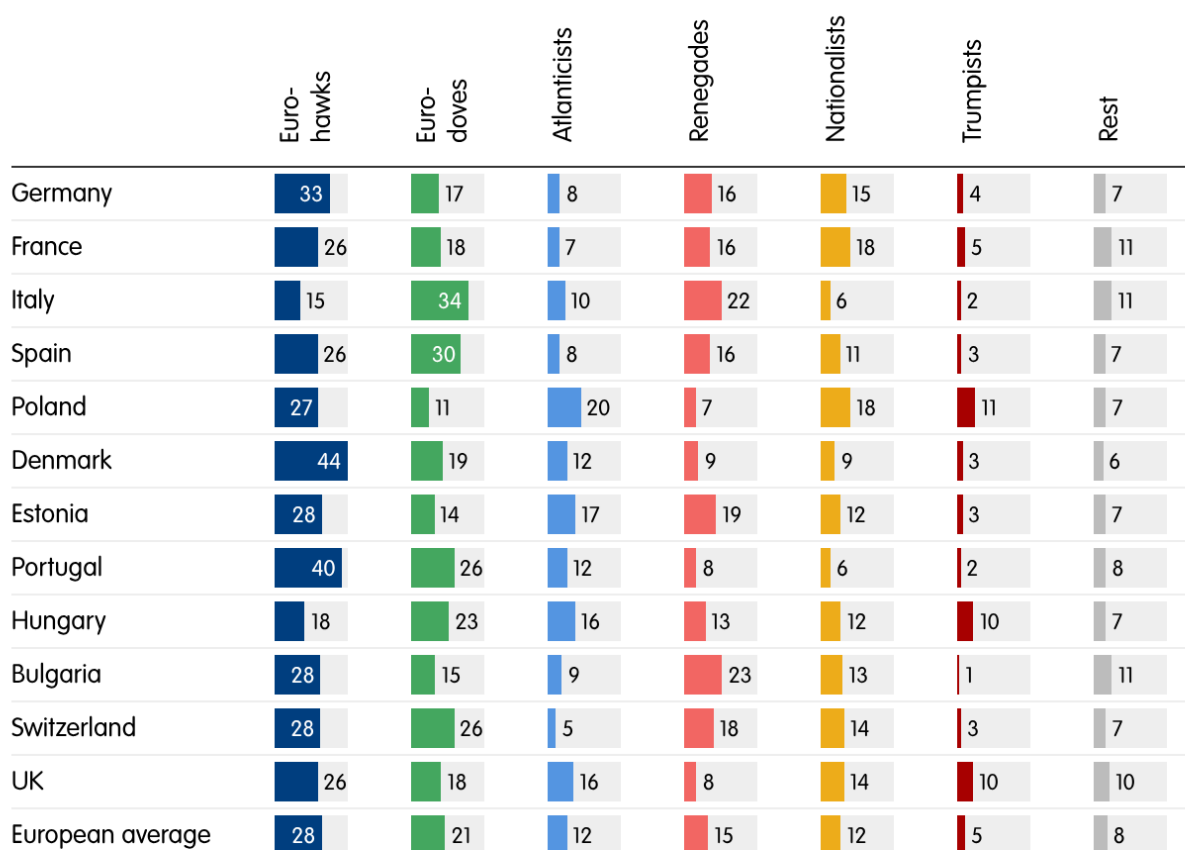
Their leaders therefore need to be more creative in identifying majorities.

# The European archipelago

To help them in that endeavour, this paper categorises the European public based on relations with the US and defence spending. It also incorporates a third factor: whether respondents believe the EU has been doing a good or bad job standing up for the values they consider important. This works as a reasonable proxy for their demeanour towards EU-level cooperation and helps to distinguish more nuances in the attitudinal picture.

The segmentation produces an archipelago of six main “islands”, each with distinct characteristics and some fundamental differences from the others.

## The European archipelago. Foreign policy segments, by country, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.

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## Island 1: Euro-hawks

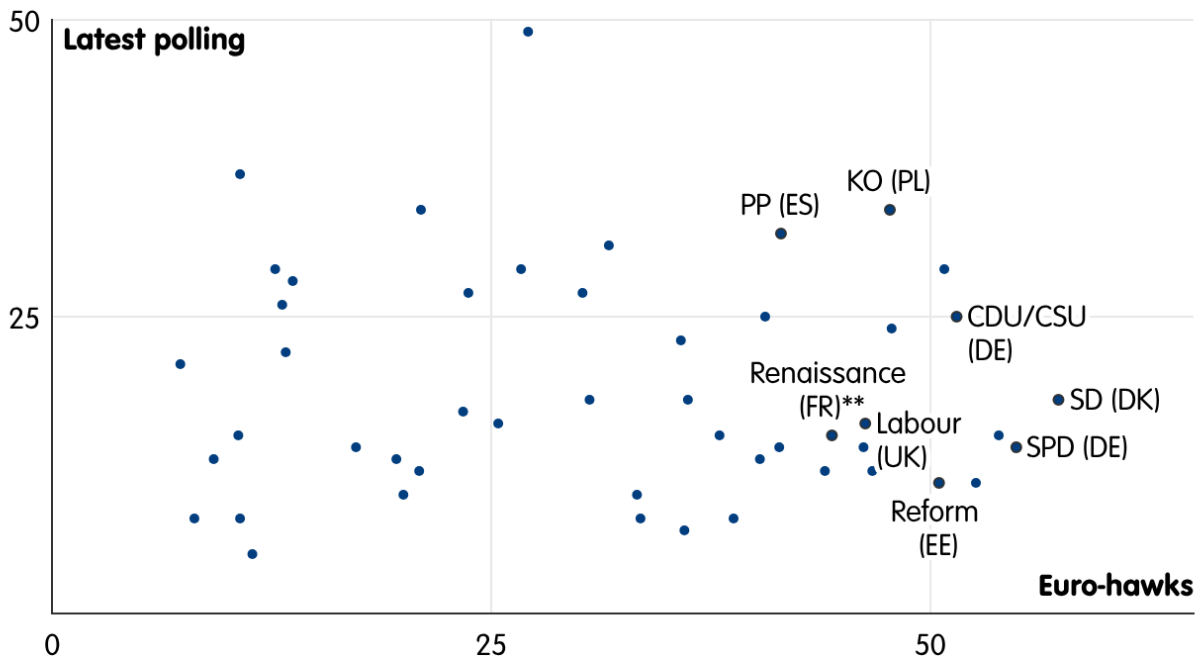


First come the **Euro-hawks (28% overall)**, who are the largest group. These are the Europeans who do not see the US as an ally, back increased national defence spending, and take a positive or at least a neutral stance towards the EU.

They represent a particularly large share of the public in Denmark (44%), Portugal (40%) and Germany (33%), where they are also the largest group nationally. But they are markedly present in almost every other country too, not sinking below a fifth of respondents anywhere except for Hungary and Italy.

The Euro-hawks constitute a particularly large share of voters within governing mainstream parties, on both the centre-right and the centre-left. In Germany, the group represents a majority among voters of both the Christian Democratic Union (CDU) (with its sister the Christian Social Union, CSU) and the Social Democrats (SPD). It is also pre-eminent among voters of the Civic Coalition (KO) in Poland, the Labour Party in Britain—and even, perhaps surprisingly given its radical roots, those of Giorgia Meloni's FdI in Italy.

**Euro-hawks.** By share of party electorate and those parties' national polling, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxix in November 2025.  
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Compared with the other groups, the Euro-hawks are the most concerned about Russia, with two-thirds of them qualifying it as an adversary. They are also the most worried about a Russian attack on their country, the use of a nuclear weapon by some countries, and a major European war. All of which suggests they would be receptive to the argument that, in the face of US abandonment, the continent is under threat and must beef up its defences and show greater assertiveness.

## The European archipelago: major threats. By group, in %

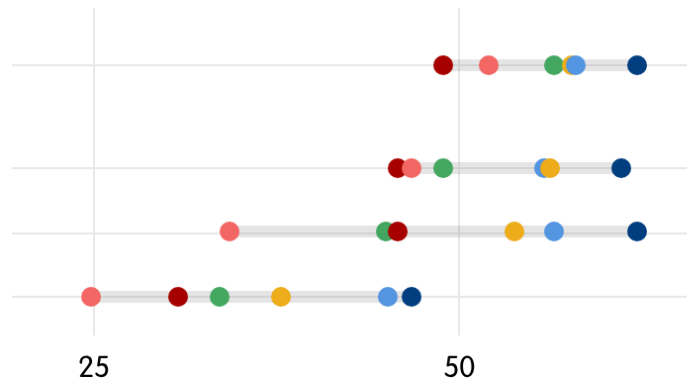
● Euro-hawks ● Euro-doves ● Atlanticists ● Renegades ● Nationalists ● Trumpists

Worried about a country using its nuclear arsenal against another country

Worried about there being a major European war (ie, not just in Ukraine)

Seeing Russia as an adversary

Worried about their country being attacked by Russia



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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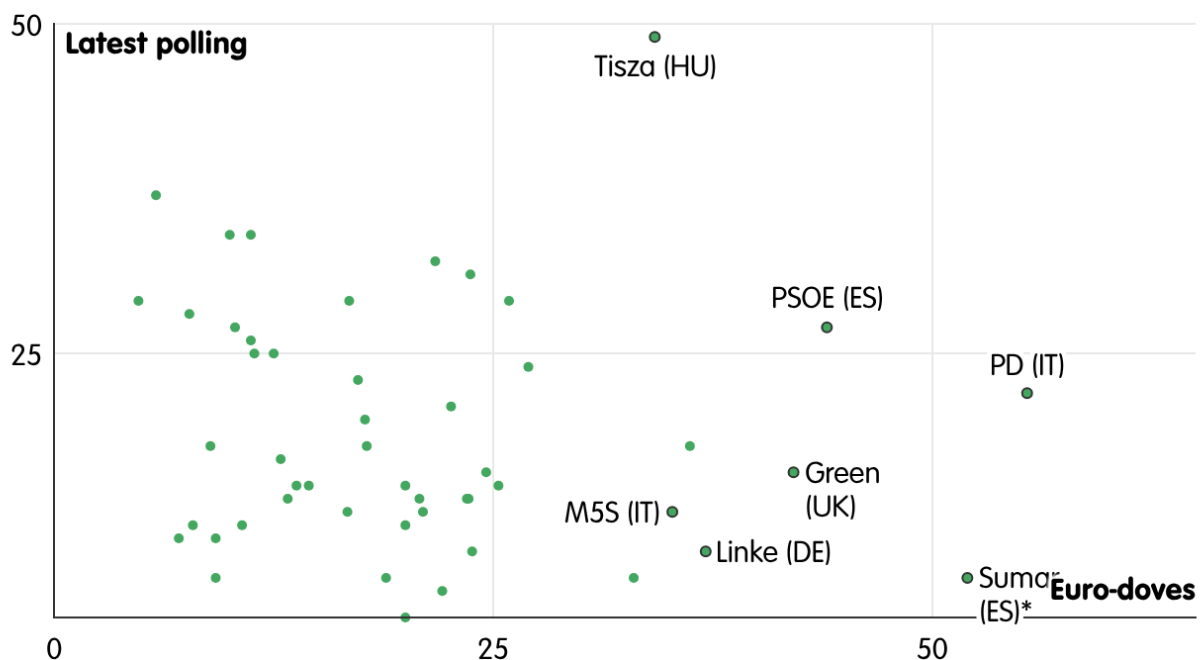
## Island 2: Euro-doves



The second biggest group are the **Euro-doves (21% overall)**. These differ from the Euro-hawks in that they do not support additional defence spending. But they are equally sober about the US and attached to the EU; simply, they have not embraced the corresponding need for a militarily independent Europe.

They constitute a particularly important group in southern European countries—especially Italy (34%) and Spain (30%), where they are the largest group nationally. The two places where they feature least are Estonia and Poland; presumably a reflection of those states’ proximity to Russia and its war in Ukraine. Politically, the Euro-doves are over-represented on the left of the political spectrum. They constitute the majority of Democrat (PD) voters in Italy, and a plurality of voters for the Socialists (PSOE) in Spain, the Five Star Movement (M5S) in Italy, the Green Party in the UK, and the Left (Linke) in Germany. Supporters of Tisza, the leading opposition force in Hungary, include more Euro-doves than Euro-hawks—suggesting that even if the party topples Viktor Orban, the country will not suddenly turn into a Poland and start ramping up its defences.

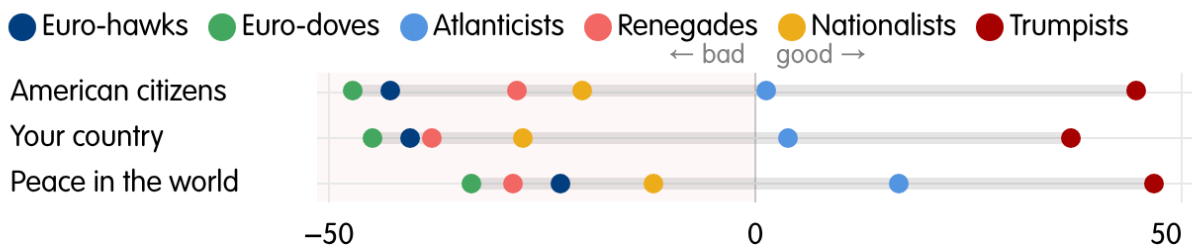
**Euro-doves.** By share of party electorate and those parties’ national polling, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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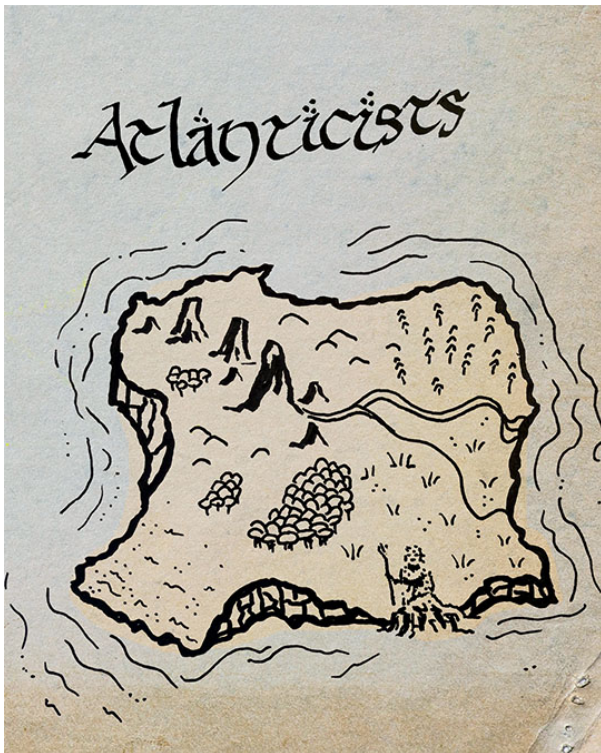
The Euro-doves are united in their negative view of today’s US and of Trump. They are the most critical of what the US president means for peace in the world and for American citizens, and are very negative about his handling of the US’s main foreign policy challenges.

**The European archipelago: views of Donald Trump.** Net views on whether his re-election was a good or a bad thing for the following, by group, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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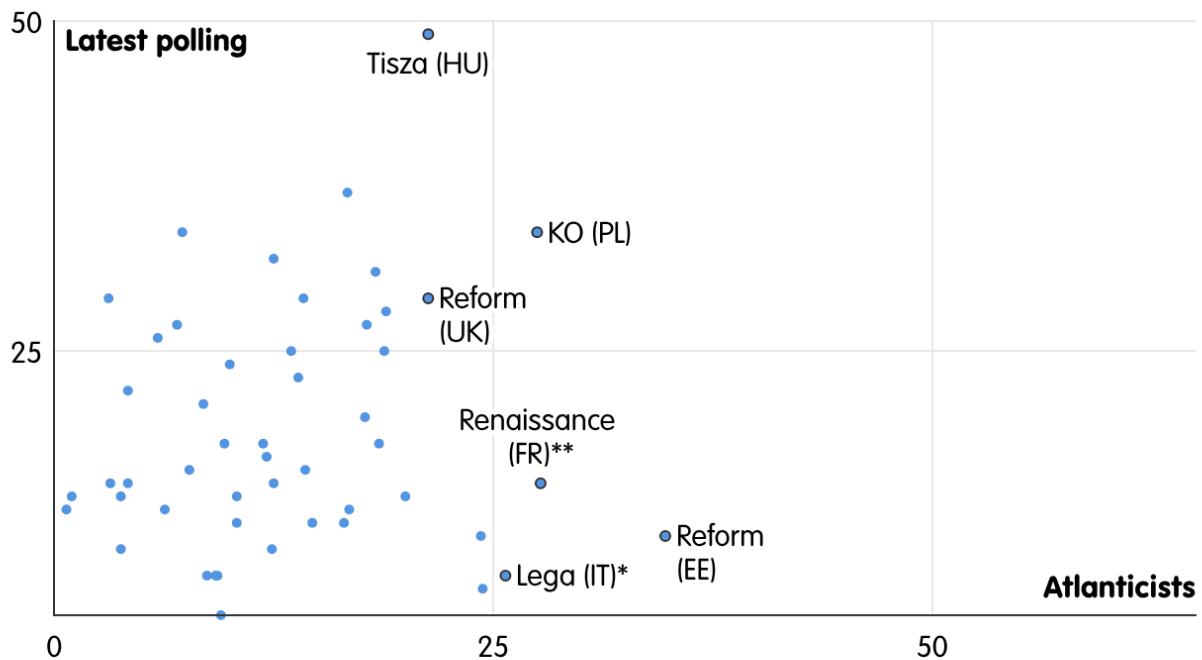
Island 3: Atlanticists



The third group are the **Atlanticists (12%)**, who consider the US an ally, while also thinking that the EU is doing a decent job defending the values they consider important. Wherever they stand on defence—and a majority of them do support various forms of military expansion—the Atlanticists’ mindset appears to be grounded in the comparatively well-functioning transatlantic relationship of the past.

This group is particularly large in the keenest NATO member states, led by Poland (20% of the national public) and followed by Estonia (17%) and Britain (16%). It comprises the second-largest group in the electorates of the KO in Poland and the Reform Party in Estonia (the liberal party of Kaja Kallas, the EU’s chief diplomat).

**Atlanticists.** By share of party electorate and those parties’ national polling, in %



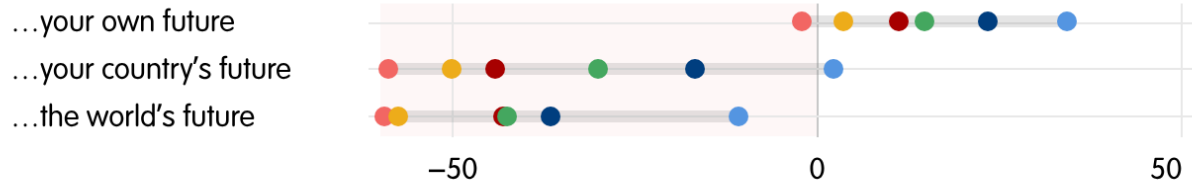
Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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Atlanticists distinguish themselves by their relatively optimistic take on the geopolitical outlook. They are the least likely to report pessimism about the future of the world, of their country and of themselves personally. Their strong Atlanticism is often combined with a faith in the EU’s potential to be a great power. Most of them believe in the growing global influence of both the US and the EU.

## The European archipelago: optimism and pessimism. By group, in %

● Euro-hawks ● Euro-doves ● Atlanticists ● Renegades ● Nationalists ● Trumpists

### Net optimism about...



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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\*

Three additional groups compose the archipelago of the European public. They are sceptical of the EU but differ in their approach to the US and to defence. Some are small at the European level, but they represent substantial groups in specific countries or parties.

### Island 4: Renegades

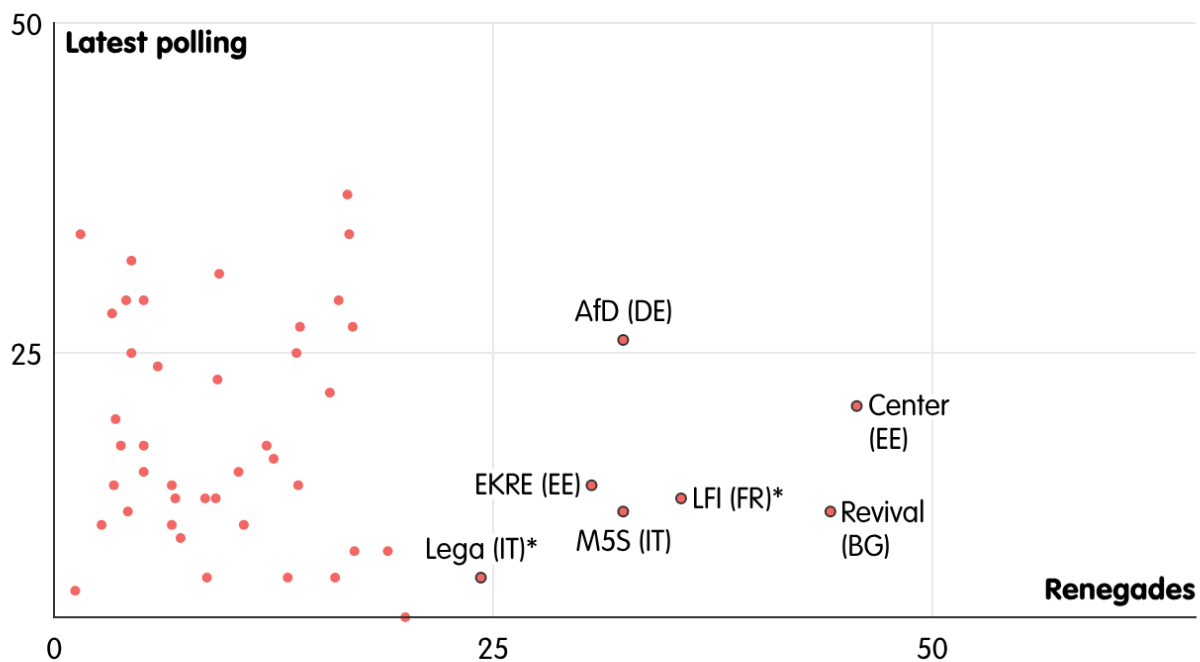


Following a decade (at least) of crises and rising populism, a substantial group of Europeans hold what might be called an “anti-system” position (**15% overall**). In the context of ECFR’s main poll questions these voters—call them Renegades—say no to everything. They do not see the US as an ally. They do not think the EU is doing a good, or even a neutral, job in standing up for the values they cherish. They do not support increased defence spending, either. If they had a mantra it might be: “que se vayan todos” (Spanish for: out with them all).

The Renegades are most present among electorates of the populist left, like M5S (32%) in Italy and France Unbowed (LFI) (35%). They are also prominent among citizens who do not vote. The anti-system crowd is most visible in Italy (22%) and Bulgaria (23%). And they feature among supporters of some far-right parties—most strikingly the AfD (32%)—as well.

These Europeans are, in some respects, the opposite of the Atlanticists, being more pessimistic about the future than members of any other group. Some of this pessimism might boil down to their highly negative outlook on political leaders. For example, 77% of Renegades think the EU has done a bad job when it comes to ending the war in Ukraine, and 71% think the same about its record on bringing peace to the Middle East.

**Renegades.** By share of party electorate and those parties’ national polling, in %

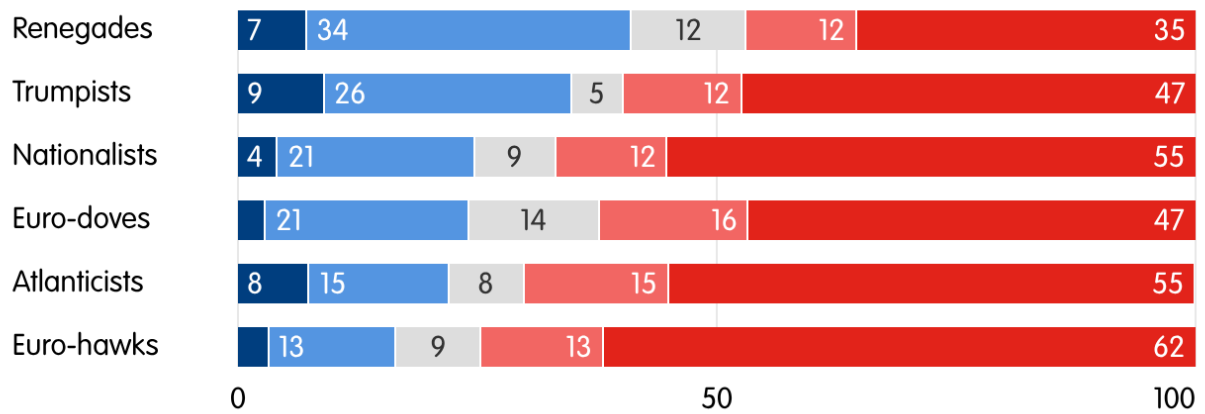


Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxix in November 2025.  
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Highly critical of the West, the Renegades are also the least disapproving of Russia. They see it and China as more likely than the US and the EU to gain in global influence in the next 10 years. That could suggest that, behind the Renegades’ apparent rejection of everything, there might loom the contours of an alternative, post-Western, vision of global order.

**Which of the following best reflects your view on what Russia is to the EU\*? By group, in %**

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

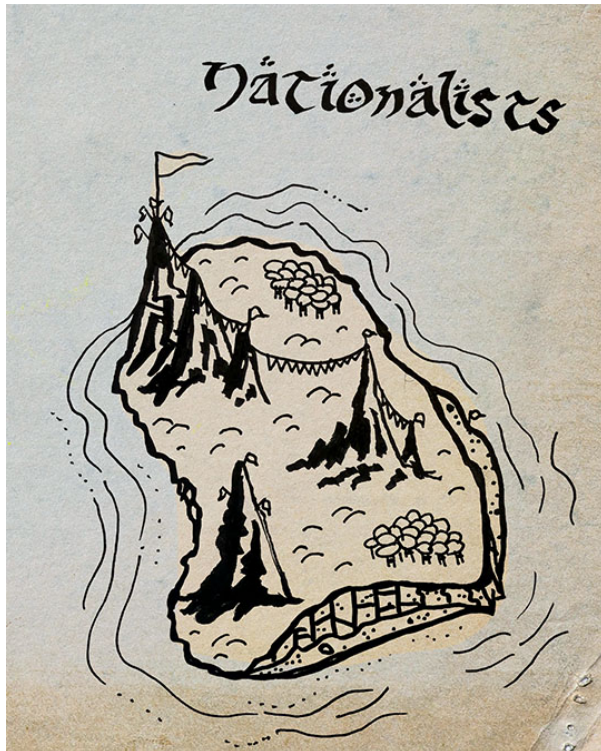


\*In Ukraine, the UK and Switzerland the question concerned the Russia’s relationship “to their countries”.

Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.

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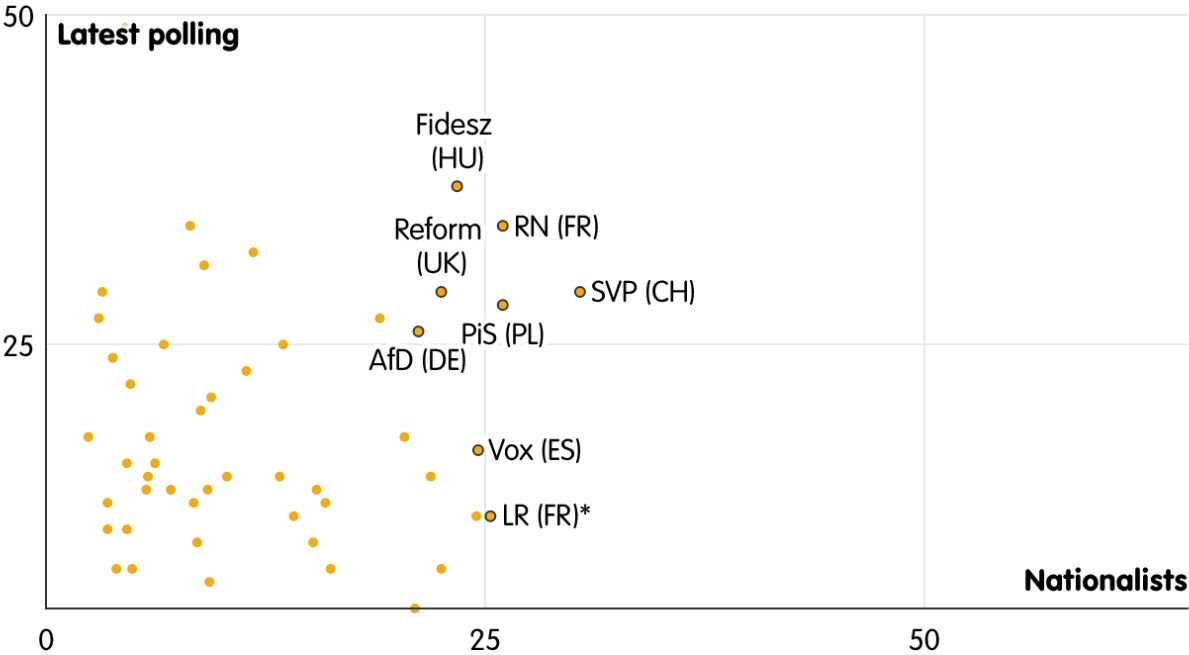
## Island 5: Nationalists



Then there are poll respondents who do not believe much in Europe, but who do believe in hard power. The **Nationalists (12% overall)** do not see the US as an ally and do not consider the EU to be doing a good or at least a neutral job on the values front. Yet they are supportive of increased national defence spending. In an unravelling global order, they look ready to defend their countries, but are highly sceptical of European cooperation.

The Nationalists are particularly influential in Poland and France, in both of which they represent 18% of the public—and are especially big among the electorates of the RN in France, and both PiS and the radical-right Confederation in Poland. They are also prominent among the voters of some other new-right parties in Europe, such as the AfD, Reform UK and Vox in Spain.

**Nationalists.** By share of party electorate and those parties' national polling, in %



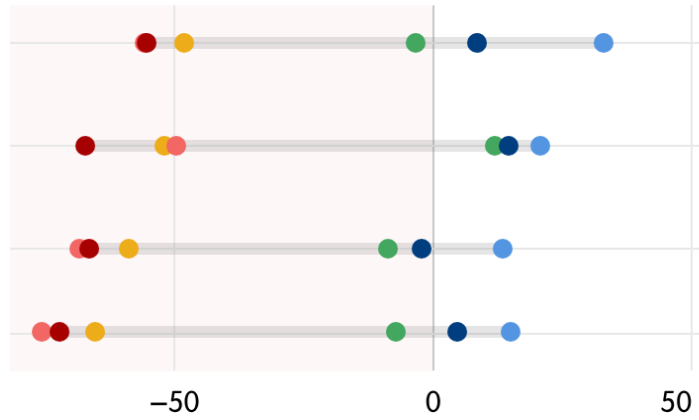
Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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Similarly to the Renegades, the Nationalists are largely pessimistic about their own countries' and the world's future. They do not believe that the EU is a power that could deal on equal terms with the US or China, and are overwhelmingly critical of the EU's job in Ukraine and in the Middle East. They are also the most likely to say that the war between Russia and Ukraine will still be going on a year from now.

## The European archipelago: views of the EU. Net views on selected topics, by group, in %

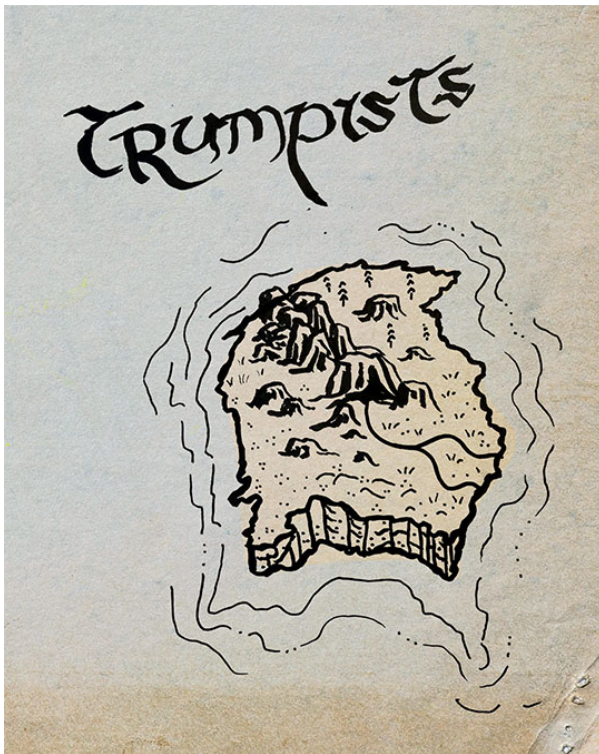
● Euro-hawks ● Euro-doves ● Atlanticists ● Renegades ● Nationalists ● Trumpists

The EU's job on managing relations with the US president Donald Trump  
 Whether EU is a power that can deal on equal terms with other powers like the US or China  
 The EU's job on bringing peace to the Middle East  
 The EU's job on ending the war in Ukraine



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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### Island 6: Trumpists

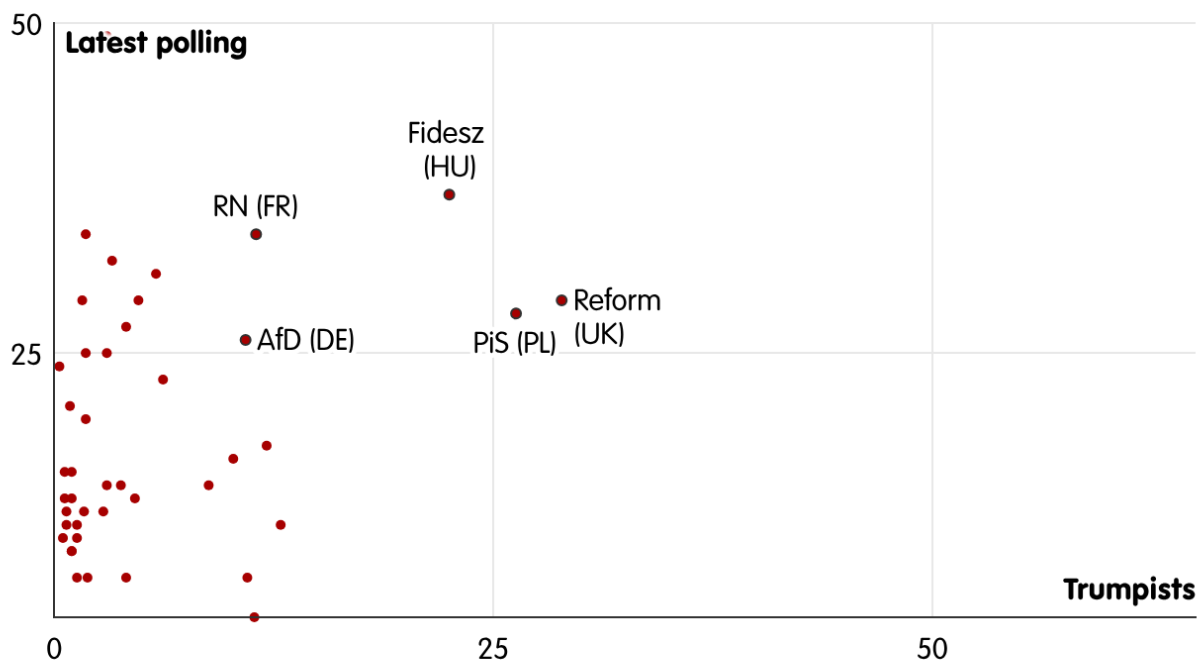


Finally, **Trumpists (only 5% overall)** consider the US an ally and view the EU poorly. Whatever they think about increased defence spending—and the majority

of them support it—they can hardly be seen as reliable allies in an effort to make Europe more independent from America in the Trumpian age.

Usually a small group, Trumpists are nevertheless relatively numerous in Poland (11% of the public), Hungary (10%) and the UK (9%)—largely thanks to their important role within the electorates of PiS, Fidesz and Reform UK, where they constitute one of two leading groups (on a par with Nationalists). However, they represent just a tenth of the AfD and RN electorates, which in itself demonstrates a major divide with Europe’s new-right family.

**Trumpists.** By share of party electorate and those parties’ national polling, in %

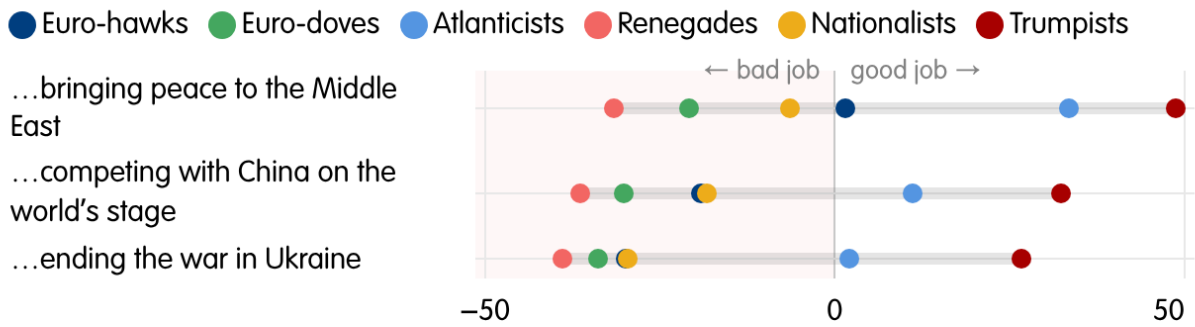


Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
ECFR · ecf.eu

Trumpists are substantially different from Atlanticists, even though they share with them the idea of the US being an ally. Indeed, other questions in ECFR’s poll reveal them to be fans of Trump, not just of America—seeing his election as a good thing for American citizens, their country and peace in the world, and assessing his foreign policy performance positively in a proportion far greater than Atlanticists.

## The European archipelago: views of Donald Trump's performance.

Net views on whether he has done a good or a bad job when it comes to the following, by group, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.  
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## Six islands

In summary, then, the geo-electoral map of Europe today looks as follows. The methodology can be found [here](#).

Faction	Share of EU public	View of Trump's US	View of the EU's current values	Attitude towards increased defence spending	Core worldview	Where they are strong
<b>1. Euro-hawks</b>	28%	Not an ally	Good or neutral	Support	Europe must defend itself and act as a geopolitical power	Denmark, Portugal, Germany; mainstream governing parties
<b>2. Euro-doves</b>	21%	Not an ally	Good or neutral	Do not support	Pro-EU and anti-Trump, but pacifist or sceptical of militarisation	Italy, Spain; centre-left parties
<b>3. Atlanticists</b>	12%	An ally	Good or neutral	Mostly positive	Believe in the old transatlantic order and strong EU	Poland, Estonia, UK; centrist and Atlanticist parties
<b>4. Renegades</b>	15%	Not an ally	Bad	Do not support	Reject all elites; pessimistic, anti-Western	Italy, France; populist-left and some far-right
<b>5. Nationalists</b>	12%	Not an ally	Bad	Support	Believe in hard power and sovereignty, not European cooperation	France, Poland; RN, PiS, Vox, AfD
<b>6. Trumpists</b>	5%	An ally	Bad	Mostly positive	Loyal to Trump over Europe; anti-EU but pro-US	Poland, Hungary, UK; PiS, Fidesz, Reform UK

## Why Europe must bridge its islands

For much of the past decade, European leaders have sought public backing for a series of common causes: supporting Ukraine against Russia's invasion, vaccinating citizens against covid-19 and decarbonising the economy. But on rearming Europe in the face of American abandonment and on freeing Europe from its transatlantic dependencies, they are failing to lay

out a persuasive narrative. More than any previous crisis, this one threatens to drive Europeans apart.

In her January 2026 speech to the World Economic Forum in Davos, European Commission president Ursula von der Leyen rightly observed that “it is time to [...] build a new independent Europe”. But she missed the opportunity to explain to the European public from whom Europeans need to become independent, as well as why and how.

Most of Europe’s national leaders have not performed much better: oscillating uncertainly between assertiveness and naivety towards Trump (Germany’s Friedrich Merz, Britain’s Keir Starmer, Poland’s Donald Tusk); mixing verbal hawkishness with a failure to invest in autonomous European defence (Spain’s Pedro Sánchez); or continuing to hope that personal flattery and negotiations will prevent the US’s shift away from Europe (Italy’s Giorgia Meloni, NATO’s Mark Rutte, Finland’s Alexander Stubb).

It is only recently, in reaction to Trump’s obsession with Greenland, that some leaders have become more outspoken. For example, Tusk recently wrote on X that “Europe cannot afford to be weak—neither against its enemies, nor ally” (by which he was referring to the US). Yet he did so in English only, hardly the best way to persuade his Polish compatriots.

To be sure, Emmanuel Macron stands out as a confident proponent of a “sovereign Europe”. But to do so against a backdrop of fragile finances and political turmoil at home, and his own tendency to act alone on the international stage, looks like irresponsible overpromising by the French president.

Take these examples together and it is clear European leaders are failing to tell the stories needed to build the coalitions needed to act. The result is division and passivity. They continue to compromise with a Trump administration that views them with disdain and acts accordingly. Last year Europeans settled for 15% tariffs on their exports to the US, while imposing none on US imports to stave off even-worse terms. They offered only a muted response to the US raid on Venezuela. Even on Greenland, perceived as a moment of successful European resolve causing Trump to back down, their response was strikingly uncoordinated, with different leaders criticising the president on different grounds.

Other pollsters have already shown that many Europeans experience all this as a humiliation. Even if most of them remain attached to the EU, it is only a matter of time until this sorry spectacle starts undermining their trust and confidence in a collaborative Europe, its institutions, its power and its future.

There is a place for pragmatism, of course. Arguments for placating Trump to buy time can make sense. But unless they are accompanied with a clear-eyed message and a sense of purpose, they are merely so much defeatism. And they are a gift to opponents of European

cooperation—both internal and external—who benefit from the narrative vacuum by pushing their own stories about (an inefficient) Europe and the (purportedly more hopeful, nation-first) future. Those forces are quickly constructing bridges of their own.

Pro-Europeans therefore have a choice: to build coalitions, or to let coalitions be built against them. The only sensible question is: which ones?

## Navigating the archipelago

In some countries, pro-Europeans’ situation is comfortable, as they have the ready majority at hand without needing to get too creative. For example, in Denmark, Estonia, Germany and Portugal, the Euro-hawks represent a majority in the electorates of a broad national political mainstream. There it should be relatively straightforward for leaders to establish a national consensus for Europe’s strategic autonomy and greater assertiveness towards America.

### The European archipelago. Foreign policy segments, by country, by voter intention, in %

Filter by country: Bulgaria / Denmark / Estonia / France / Germany / Hungary / Italy / Poland / Portugal / Spain / Switzerland / UK

Germany

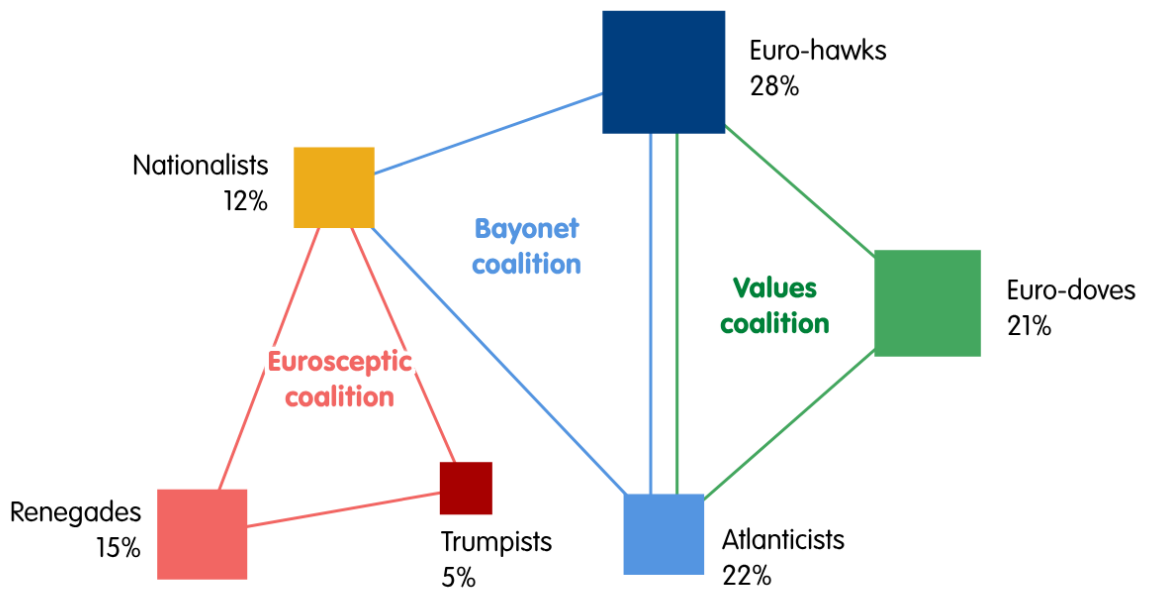
	Euro-hawks	Euro-doves	Atlanticists	Renegades	Nationalists	Trumpists	Rest
AfD (DE)	13	11	6	3	21	11	5
CDU/CSU (DE)	52	11	14	4	14	3	3
SPD (DE)	55	13	10	7	9	1	5
Greens (DE)	47	20	10	7	14	1	2
Linke (DE)	20	37	4	19	15	1	4
<b>Germany total</b>	<b>33</b>	<b>17</b>	<b>8</b>	<b>16</b>	<b>15</b>	<b>4</b>	<b>7</b>

Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025. · Get the data  
 ECFR · ecf.eu

But elsewhere, where the public is more divided, it is possible to imagine three sorts of coalitions. One would be composed of those supportive of a defence ramp-up. Another would

centre on pro-Europeans who have no illusions about America. And the third would unite the opponents of today's EU.

That third coalition would be a disaster for Europe at a time where more cooperation, not less, is needed. The mere possibility of it materialising should serve as an additional motivation for pro-European leaders to consider seriously the first two options—and take the necessary steps to activate them.



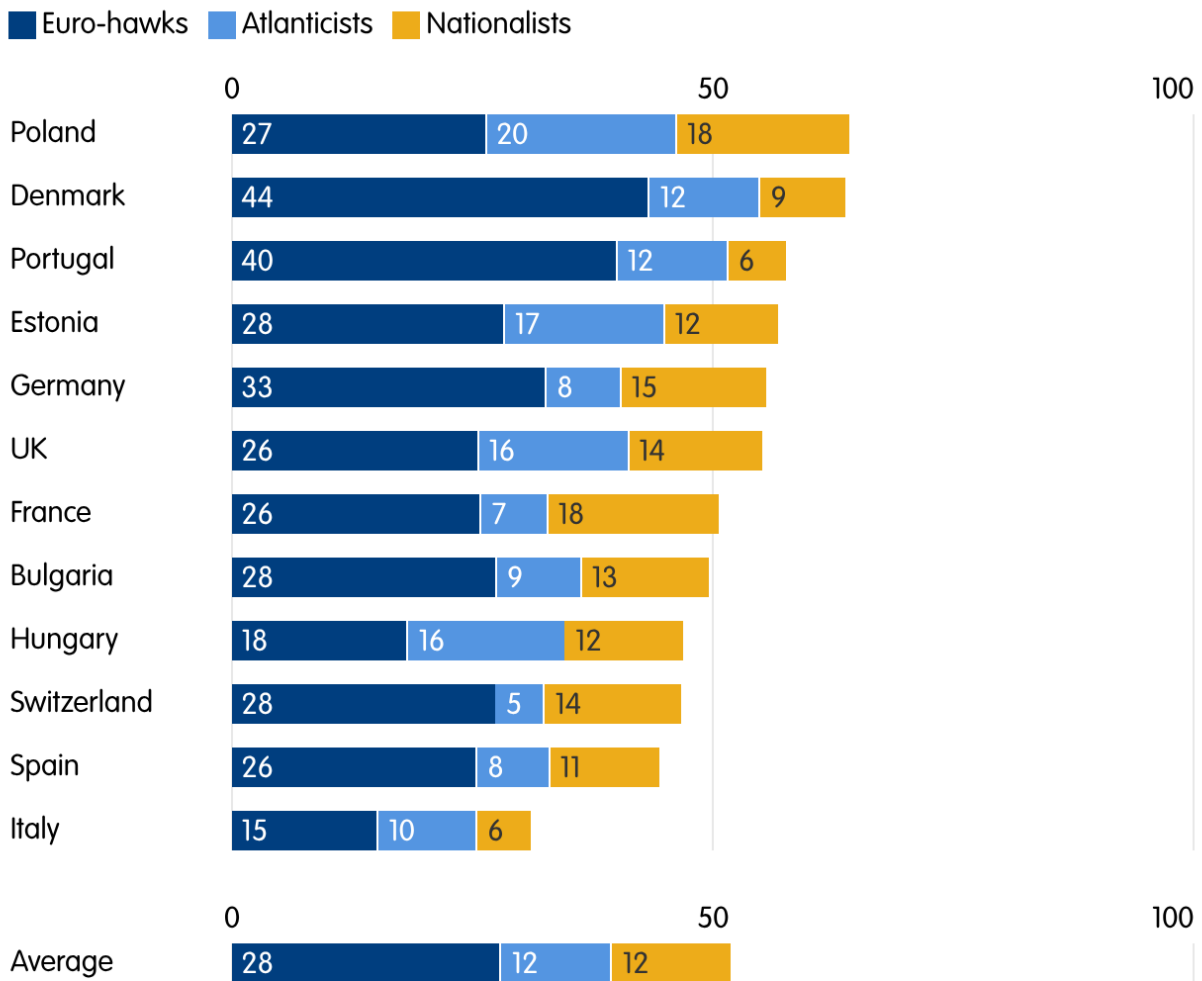
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## The bayonet coalition



The first strategy would involve the Euro-hawks and the Atlanticists extending their hand to the Nationalists, or at least some of them. Even if the latter do not share their admiration for the EU, they do, at least, realise that increased defence spending is necessary. Taken together, these three groups represent 52% of the European public—and at least 50% in every country except Hungary, Italy, Spain and Switzerland. Call them the bayonet coalition.

## The European archipelago. Bayonet coalition, by country, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025  
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Despite polarised electorates in countries like France and Poland—where domestic disagreements will likely only increase ahead of their elections in 2027—it might still be possible to build a national consensus there on defence-related issues. That happened already in 2022, when Europeans showed real solidarity with Ukraine in the face of Russian aggression.

Today, too, Europe’s defence needs can bridge political divides. In France, for example, the RN welcomed Macron’s reinstatement of a voluntary military service in November 2025. Similarly, in Spain, there is common ground on higher defence spending between the centre-right People’s Party (PP) and Vox (the two parties could conceivably form the next government). And the toxic standoff between the PP and the governing centre-left PSOE makes the policy gap between the two seem larger than it really is. Even there, common ground could be found.

Meanwhile, in Poland, ECFR's poll shows that over three-quarters of both PiS and KO supporters back increased defence spending. That said, those two parties and their electorates are radically opposed in their perception of Trump and the US—exposing Donald Tusk, the KO prime minister, to immediate criticism from PiS and President Karol Nawrocki anytime he, or his foreign minister, strike a more assertive tone vis-à-vis the American president. The issue there is less the amount of spending than the extent to which this should be coordinated and integrated at the European level (and directed away from US-made arms).

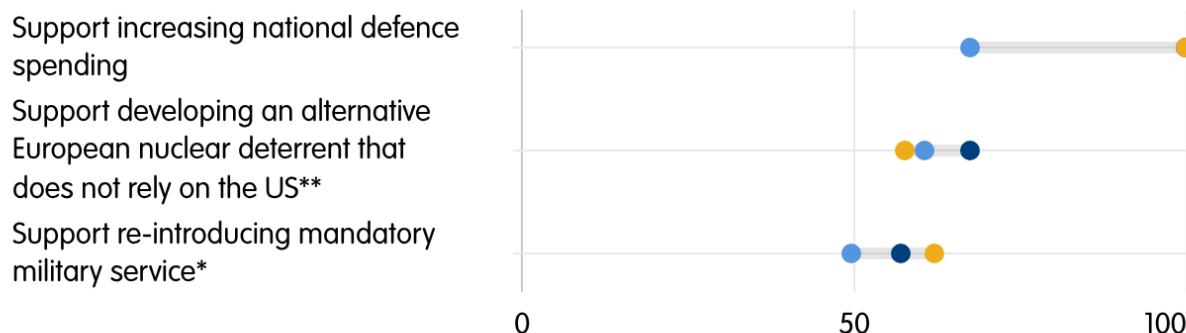
Moreover, the reality is that much of the support for Europe's military ramp-up is currently located among the electorates of the new right. For instance, electorates such as those of FdI, Portugal's radical-right Enough (Chega), PiS, the RN and Vox are among the most supportive, nationally, of the re-introduction of mandatory military service and of the rise in national defence spending.

But mainstream cooperation with such parties, even on defence, has its limits. Nationalists are unlikely to support European defence integration, which is vital for the additional spending to be effective. Parties in whose electorates they are heavily represented, like PiS, tend to oppose joint European military spending mechanisms, such as the Commission's Security Action for Europe (SAFE) initiative. They would hardly be allies on making Europe autonomous from America, given their dislike of the EU and, in several cases, sympathy towards Trump. In Poland, for example, PiS and KO supporters may both support defence spending increases but Donald Tusk, the KO prime minister, and Karol Nawrocki, the PiS-backed president, disagree starkly on the geopolitical context.

And leaders of some radical-right parties—including RN's Marine le Pen and Reform UK's Nigel Farage—are at best lukewarm supporters of Ukraine, which would make it hard to convince them of the urgency of ramping up defences because of the Russian threat. After all, why should Europeans rush to deter Russia if they can just as well settle with it?

## The European archipelago: defence policy preferences. By group, in %

● Euro-hawks ● Atlanticists ● Nationalists



\*not asked in Denmark, Estonia and Switzerland.

\*\*not asked in France and the UK.

Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025.

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In the short-term, then, there is a clear risk that mainstream European parties cooperating with nationalist rivals on re-armament would contribute to the latter's further normalisation—and even pave their way to power. However, in the medium term, this cooperation might become an inevitable reality, especially if the new right continues to rake in big wins, as could soon happen in France, Poland, Spain and the UK. Developing a vision for this coalition today could help build the bridges for the future, such that these parties become more constructive players, as is currently the case of Meloni's FdI.

Certain narratives may help to bridge the differences. For example, one could centre on the objective of making European countries strong enough to resist outside coercion. In a world where great powers are increasingly behaving like predators (including but not only the US) Europeans need to lock arms and fight back, or they risk facing erasure. Euro-hawks and Atlanticists would need to make a subtle case to Nationalists that Europeans are stronger together—reminding them that, in a world of competition and rivalry, Europe's best allies are to be found inside Europe. They do not have to share the Nationalists' vision of a “civilisational” Europe to appeal to shared fears of European fragmentation. In exchange, the Euro-hawks and the Atlanticists may have to cede ground on the defence spending: accepting it should happen primarily nationally, with a more limited role for Brussels, and abandoning hopes for common European debt to finance it.

In short: bayonet coalitions are possible, and may at points be necessary—but would come at a cost and would be laden with risk.

## The values coalition

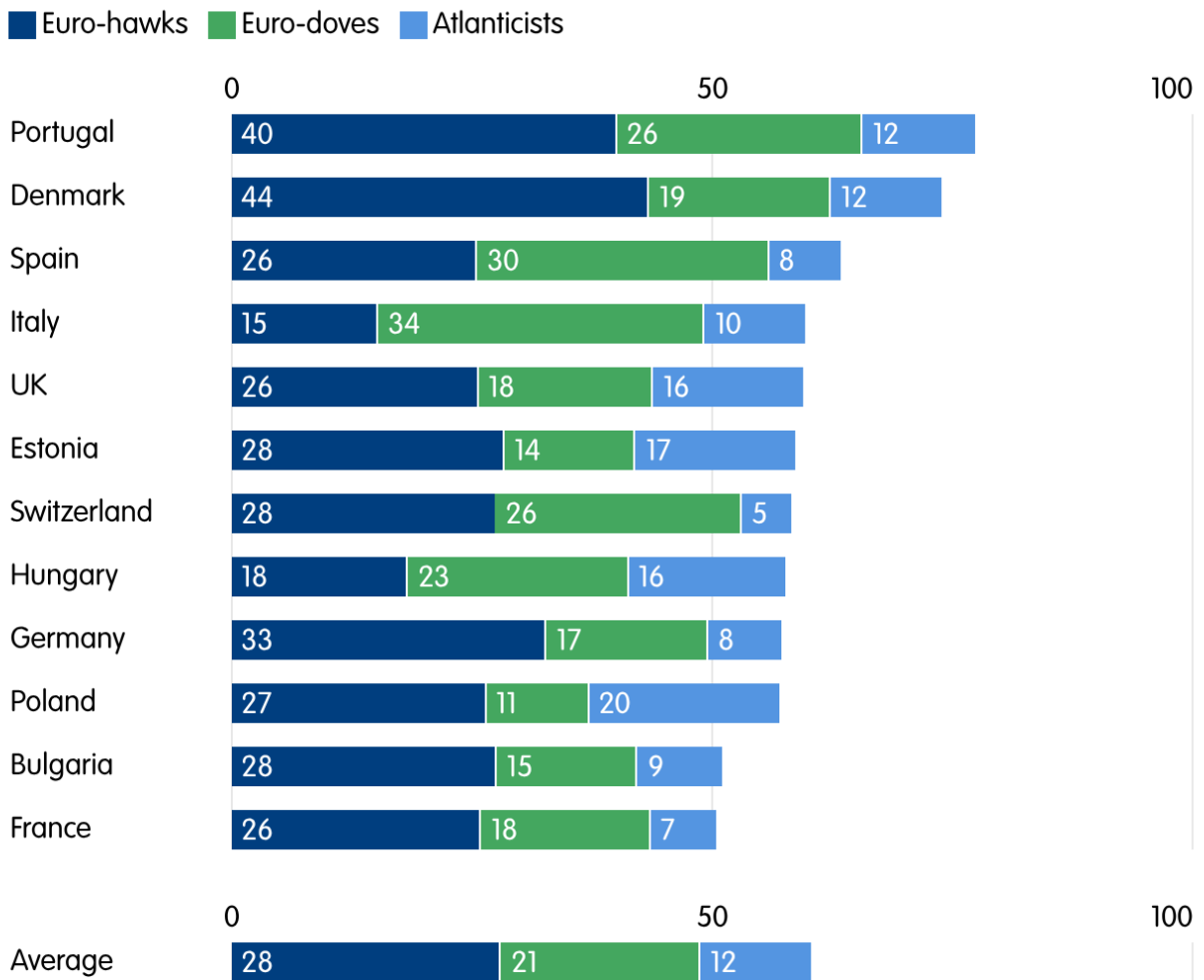


An alternative approach would be for the Euro-hawks to try and mobilise the Euro-doves. The latter do not share the former's urgency to arm the continent in the face of American withdrawal but they are, at least, allies in understanding that the US is now a predator and that the EU (to which both groups feel strongly attached) faces a grave danger from external threats.

Taken together—and potentially united by a powerful narrative of European resistance in the face of American aggression—these two groups represent almost a majority of the European public (49%). They reach the 50% threshold in five countries (Denmark, Germany, Portugal, Spain and Switzerland).

Elsewhere, where that majority is missing, these two could rally the Atlanticists, who are the strongest believers in Europe despite their continued faith in America too. Together, these three would form a strong “values coalition”, reaching more than 60% across Europe and a majority everywhere.

## The European archipelago. Values coalition, by country, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Dataprix in November 2025  
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Unlike the bayonet coalition, centred on the need to develop defence capabilities, this alliance would primarily mobilise support for an independent Europe. Its rallying narrative for the Euro-hawks, Euro-doves and Atlanticists would draw on pro-European ideals—at a time when great powers are trampling international law, global rules and norms, and seeking to push Europe around. In such a world, the argument would go, Europeans need to rearm and resist external pressures, make their principled voice more vocal, retain the freedom to be whoever they want to be, and save the EU from collapse. Macron embodied this approach in [his recent Davos speech](#), in which he said that Europeans cannot adopt a purely moral posture, nor can they accept the new colonial approach, and should instead become more autonomous and strive for an efficient multilateralism.

But voters in each of these three groups might need different entry points to such a narrative; with the Euro-hawks being mobilised most by the fear of war, the Euro-doves by the danger to Europe and its values, and the Atlanticists by the hopeful prospect that strengthening Europe can help restore some of the old geopolitical order.

While Euro-doves are sceptical of the need to spend more on defence, the other two groups will likely agree that security is a condition for the EU's survival, as well as the continent's prosperity and its capacity to stay true to its values. Such a coalition would seek to reconcile those who focus chiefly on the security challenge with the others who prioritise material considerations. Its supporters could argue that Europe cannot be prosperous without being secure, and cannot be secure without being prosperous.

Two other lines of argument could be used to win over Euro-doves: industry and solidarity. On industry, pro-European voters unpersuaded of the defence case for greater military spending might be more convinced by the prospects of new jobs, growth and technological progress through that investment. On solidarity, one could make the case that—even if their countries do not feel at risk from outside attack—that investment is needed to protect other Europeans in peril (“do unto others as you would have them do to you”). However, that latter strategy would depend on a local sense that Europe *did* provide solidarity in past crises, like the euro-zone or migration ones. That is not the case everywhere.

Spain serves as a thought experiment about the usefulness of such a values coalition. As indicated earlier in this paper, a government of the PP and Vox after the next election could conceivably demonstrate greater ambition on defence compared with the current left-leaning government. But bringing the far-right into a coalition in one of Europe's largest member states would likely create other dangers—and, therefore, can hardly be considered a best-case scenario. Meanwhile, Pedro Sánchez's important role in Europe on standing up to Trump should not be discounted lightly. The question is rather about the arguments that could convince him—and help him convince his own electorate—of the need to spend more on defence too. Tapping into the Euro-doves' despair with Trump, and with the more dangerous world he is engendering, could do that trick.

## The Eurosceptic coalition

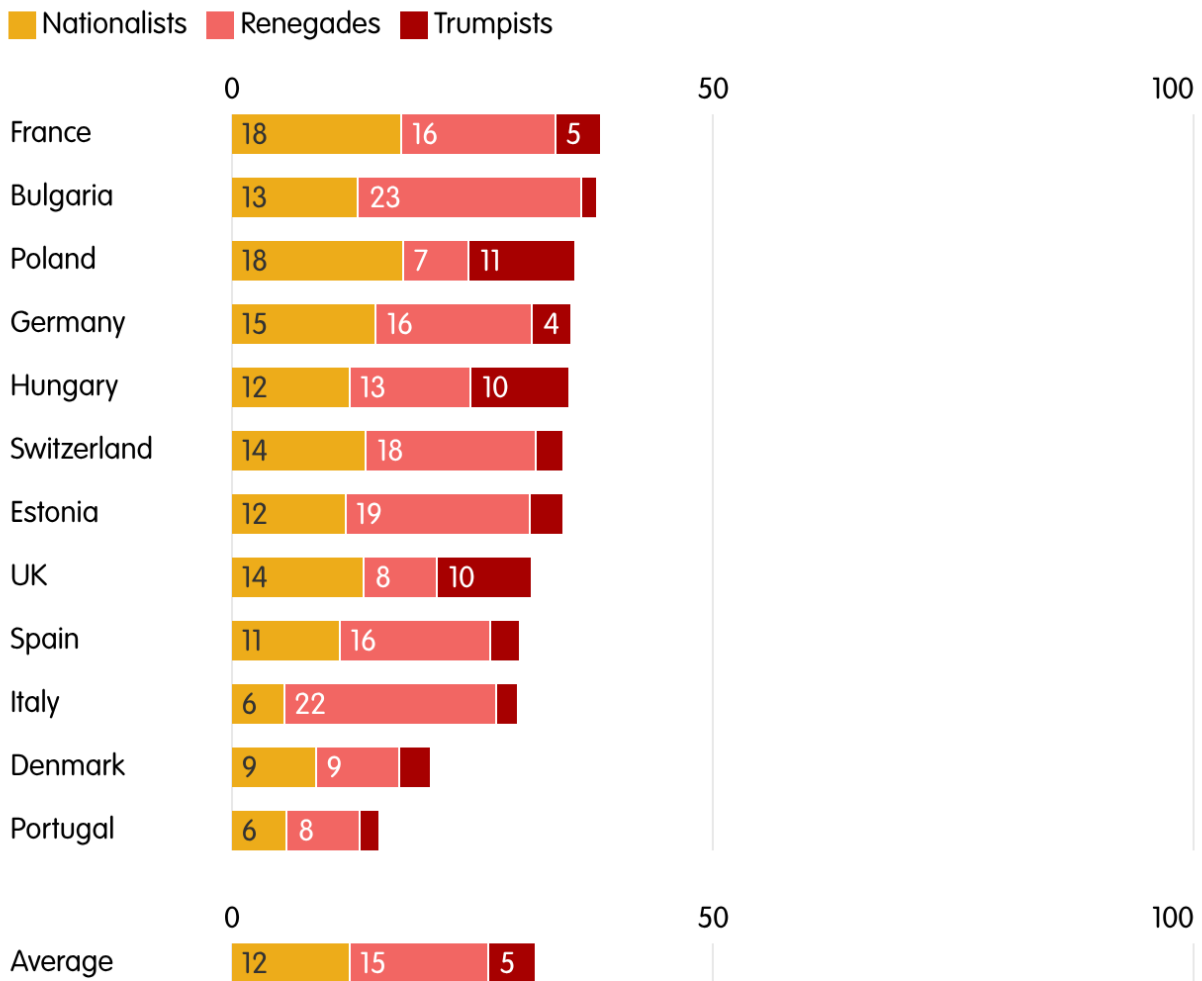


But possible coalitions do not end here. A third one would assemble the Eurosceptic crowd: the Renegades, the Nationalists and the Trumpists.

One dislike unites them all: disapproval of the EU. And those who are worried about Trump's culture war against Europe should not feel too easily relieved seeing the small size of the Trumpist group in most countries. After all, the US president and his MAGA crowd have shown an appetite to build bridges with all sorts of Eurosceptics, whether they are predominantly Nationalists (like RN), a mix of Nationalists and Trumpists (Fidesz, PiS, Reform UK) or dominated by Renegades (Afd). In a way, the very fact that Trump and his allies manage to find a common language and purpose with European parties so different in their policy outlook is making the emergence of the anti-European coalition more imaginable.

For the moment, in no country would such a coalition command a majority. And in some states it would not even be possible; like Bulgaria, where the parties in question are too mutually opposed to work together. But then, anti-Europeans do not necessarily need a majority. It would be enough for them to enter the government to do lasting damage; sabotaging any effort at a concerted EU approach to Trump, undermining the bloc's capacity to stand up for its values, leading to its institutional paralysis, and gradually (or not so gradually) eroding it. As Steve Bannon recently put it, "The third really big element to kill the EU [after Brexit and Donald Trump's presidency]... I think will be the election of Marine Le Pen". Not an unlikely and not too distant a scenario.

## The European archipelago. Eurosceptic coalition, by country, in %



Source: ECFR-commissioned public opinion survey, conducted by YouGov, Norstat and Datapraxis in November 2025  
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## A new map

Climb the tower. Look through the telescope. Survey the archipelago. Imagine the bridges.

Do European leaders have the luxury of treating the bayonet and the values coalition as equally appealing options? Can they nurture both at the same time? The authors of this paper believe the answer to both questions should be “no”.

Admittedly, European politics is changing. Nationalists are gaining ground. So, in time, the bayonet coalition may be the only option in some places—like France, Poland or Spain, all of which could see the new right make gains in elections due in 2027. But for now the values coalition is the most realistic and useful. It best corresponds to the essentially pro-European

outlooks of most existing leaders. It may be more politically realistic, as unlike the bayonet coalition it does not try to fuse nationalist and Europeanist tendencies that are innately in tension. And it works across an array of challenges: not just the continued Russian threat but also that of an increasingly aggressive Trump and the need for Europeans to collaborate more closely on everything from trade and defence to technology and diplomacy. For example, increased military spending will only have its full enabling and deterrent effect if it is properly coordinated at the European level—which better fits the make-up of the values coalition than the bayonet one.



But building that values coalition would require its three constitutive islands in the European archipelago to join up.

Countries with a Euro-dove bent, for example, such as Italy or Spain, will need to increase their defence spending. Simply put, the scale of Europe's necessary defence catch-up is such that the continent cannot afford two large member states opting out from that effort.

More Atlanticist countries, such as Poland and Estonia, will need to admit that the American pressures on European allies are a real danger—and cannot be dismissed just because Europe remains reliant on US weaponry and security guarantees.

All this also means that Euro-hawk countries (by evolution, like Germany with its recent *Zeitenwende*, or by tradition, like France with its Gaullist instincts) need to coordinate fully with their European peers. They must tell the story jointly, rather than imposing it on others. That would help convince some of the more sceptical publics, east and south, that this is a collective effort in the name of a common goal—rather than a cynical bid to fill the coffers of French and German defence firms.

Offering such a narrative about Europe and the transatlantic relationship would present voters with a clearer and, ultimately, more optimistic vision of the future. It could give them a way out of their current gloom, help to restore confidence in the EU, perhaps even slow the voter

migration to the extremes, and serve as a shared map. It is time for leaders to build bridges across the archipelago.

## Methodology

This report is based on a public opinion poll of adult populations (aged 18 and over) conducted in November 2025 in 13 European countries (Bulgaria, Denmark, Estonia, France, Germany, Hungary, Italy, Poland, Portugal, Russia, Spain, Switzerland and the UK).

The polls were conducted online by Datapraxis and YouGov in Bulgaria (1,020; 5-21 November); Denmark (1,029; 5-13 November); France (1,518; 5-18 November); Germany (2,028; 5-14 November); Hungary (1,020; 5-14 November); Italy (1,501; 5-19 November); Poland (1,525; 5-14 November); Portugal (1,030; 5-17 November); Spain (1,566; 5-13 November); Switzerland (1,104; 5-14 November), and the UK (2,034; 5-15 November). Polls were conducted online by Datapraxis and Norstat in Estonia (1,018; 7-19 November).

In Ukraine, polls were conducted by Datapraxis and Rating Group in Ukraine (1,501; 8-11 November) via computer-assisted telephone interviews, with respondents selected using randomly generated telephone numbers. The data were 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 level of representativeness of the survey and generally reflects the attitudes of Ukrainian public opinion in wartime conditions.

The segmentation of the European public described in this report is based on the following questions: (a) Generally speaking, thinking about the US, which of the following best reflects your view on who they are to the EU\*? (\*or, in the case of Switzerland and the UK, "...to your country?"); (b) At the current time, would you support or oppose your country increasing national defence spending?; and (c) Do you feel the EU has been doing a good or a bad job on the values that you consider important?

Depending on answers to these three questions, respondents were sorted into the six segments, namely:

- “Euro-hawks” – if they did not identify the US as an ally; saw the EU as doing a “good” or at least “neither good nor bad” job on the values front; and supported increased defence spending;

- “Euro-doves” – if they did not identify the US as an ally; saw the EU as doing a “good” or at least “neither good nor bad” job on the values front; and did not support increased defence spending;
- “Atlanticists” – if they identified the US as an ally; and did not identify the EU as doing a “bad” job on the values front;
- “Renegades” – if they did not identify the US as an ally; did not identify the EU as doing a “good” or at least “neither good nor bad” job on the values front; and did not support increased defence spending;
- “Nationalists” – if they did not identify the US as an ally; did not identify the EU as doing a “good” or at least “neither good nor bad” job on the values front; and supported increased defence spending;
- “Trumpists” – if they identified the US as an ally; and saw the EU as doing a “bad” job on the values front.

The remaining respondents, who responded “Don’t know” to at least two of the three questions, were not allocated to any of the six segments—and were instead put in the residual “Rest” group.

Assessments of different party electorates presented in this paper are based on the voter intention question (“If the next parliamentary election was held tomorrow, how would you vote?”). The one exception was France, where they are based on the electoral sympathy question (“Which political party best defends your ideas?”). The analysis includes only those parties whose supporters meet a minimum sample size of 100 respondents. For the parties whose sample was between 76 and 99 respondents an asterisk (\*) indicates that readers should treat those results with greater caution. The authors also decided to include one party—Macron’s Renaissance, as France’s governing party—even though the sample of its supporters was lower than 76. In that case, a double asterisk (\*\*) signals that its results merit even-greater caution.

## About the authors

Célia Belin is a senior policy fellow at ECFR and head of its Paris office. She is a former visiting fellow at the Center on the United States and Europe at the Brookings Institution in Washington, DC, and she briefly served as its interim director in 2022. She also served as an adviser on US affairs in the policy planning unit (CAPS) of the French foreign ministry between 2012-2017. She holds a PhD in political science/international relations from the University

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

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