

# **LIVING IN AN À LA CARTE WORLD: WHAT EUROPEAN POLICYMAKERS SHOULD LEARN FROM GLOBAL PUBLIC OPINION**

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## **SUMMARY**

- European and US leaders tend to view today's world through a lens of competing ideological and political systems, in which you are with the West or against it.
- But the results of a major public opinion poll indicate that people all over the world instead favour an à la carte arrangement, in which their governments can pragmatically choose their partners depending on the issue at stake.
- China and Russia do not compete with the West in terms of their attractiveness as a place to live or the values that people want to live by. People also tend to prefer their countries to cooperate more closely with a US-led bloc on security, but prefer economic cooperation with China. Overall, people outside the West do not want full political alignment with either China or Europe and the US.
- This is perhaps most evident when it comes to issues of war and peace. Most people in non-Western countries want Russia's war on Ukraine to end as soon as possible, even if it means Kyiv ceding territory.
- The value that people place on Western standards of living and values does not translate into faith in the European political project or the resilience of liberal societies. Many people outside the West doubt whether the EU and even liberal societies more broadly will survive.

# Introduction

Leaders in Europe and the United States often frame the 21st century world as a rivalry between competing ideological and political systems. They talk of winning over the ‘global south’ to the West and shoring up the rules-based order against its challengers.

But a major opinion poll conducted this autumn in 21 countries for ECFR and Oxford University’s Europe in a Changing World research project shows that this way of thinking misunderstands how many people outside the West look at the world.

Our poll shows that Europe and America are seen as more attractive and having more admirable values (or, as having more soft power) than both China and Russia. But this does not translate into political alignment. For most people in most countries – including some inside the EU itself – we have entered an à la carte world in which you can mix and match your partners on different issues, rather than signing up to a set menu of allegiance to one side or the other.

This second round of ECFR and Oxford polling in what we call the CITRUS countries (China, India, Turkey, Russia, and the US) and 11 European countries (Denmark, Estonia, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, and Switzerland), together with five other major non-European countries that we have polled for the first time (Brazil, Indonesia, Saudi Arabia, South Africa, and South Korea), reveals a complex geopolitical landscape in which people in great and middle powers around the world do not want to accept only one fixed set of partnerships.

After Russia’s full-scale invasion of Ukraine on 24 February 2022, Europeans and Americans tried to mobilise the world in defence of the post-cold war liberal order. But, as our first survey of the CITRUS countries earlier this year demonstrated, this hope has been sharply disappointed. Our new poll again shows that much of the rest of the world wants the war in Ukraine to stop as soon as possible, even if it means Kyiv losing territory. And very few people – even in Europe – would take Washington’s side if a war erupted between the US and China over Taiwan.

Indeed, many people outside the West regard the unique importance attributed to this European war as an example of Western double standards. Now, with the war in Ukraine continuing beyond its 600th day, another major war under way between Israel and Hamas (which erupted after our polling was completed), and a real medium-term threat of armed conflict between the US and China over Taiwan, it looks as if the world is becoming one of multiple wars as well as ever changing alliances.

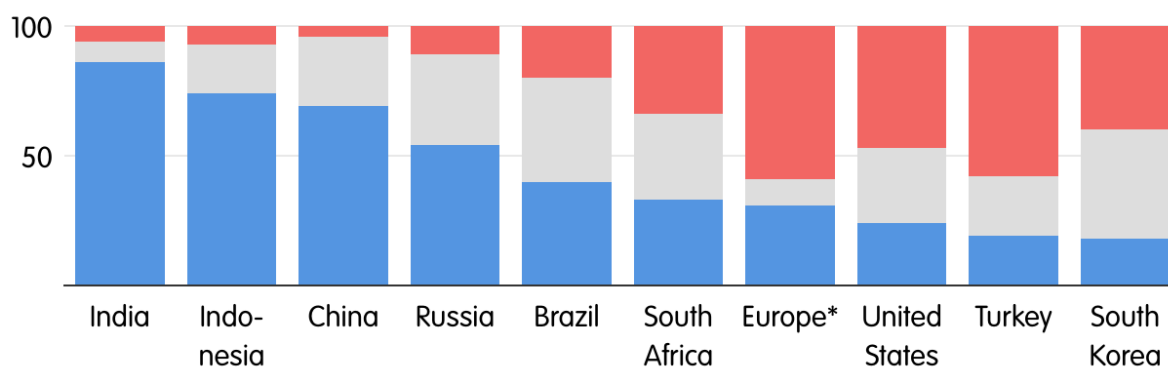
EU leaders insist on the bloc being seen as a geopolitical actor – a demand its foreign policy chief, Josep Borrell, recently reiterated in Beijing. People in much of the rest of the world, however, see the European Union as an attractive destination, but not a hard power (that is, the power that derives from military and economic means) to be reckoned with. In fact, while many people outside the West value American and European ways of life, they also seem to have doubts about whether these liberal societies will survive.

In short, people from countries all over the world still want the West in their lives for everything that it has to offer and is managing to hold onto as the world changes. But Western leaders will not maximise their potential for geopolitical leadership if they continue to frame world politics in terms of bipolar choices (“with us or against us”) reminiscent of the cold war or former US president George W Bush’s “war on terror”.

## Choices, choices

Many policymakers in the West still hope to preserve the post-cold war international order, but in other parts of the world, governments are busy adjusting to its demise and, where possible, trying to benefit from the new disorder. In terms of public opinion, the proverbial Jewish telegram “Start to worry. Details to follow” probably captures best the state of European and American feelings about how things are going. Compared to many countries around the world, people in the EU and the US are more pessimistic about their countries’ futures.

## In general, do you feel optimistic or pessimistic about your country's future? In per cent



\*We did not ask this question in Europe. For comparison, we display the average results of responses to Eurobarometer's question: "At the present time, would you say that, in general, things are going in the right direction or in the wrong direction, in your country?". We assume people are optimistic about their country if they believe "things are going in the right direction" there, and they are pessimistic if they think things are "going in the wrong direction".

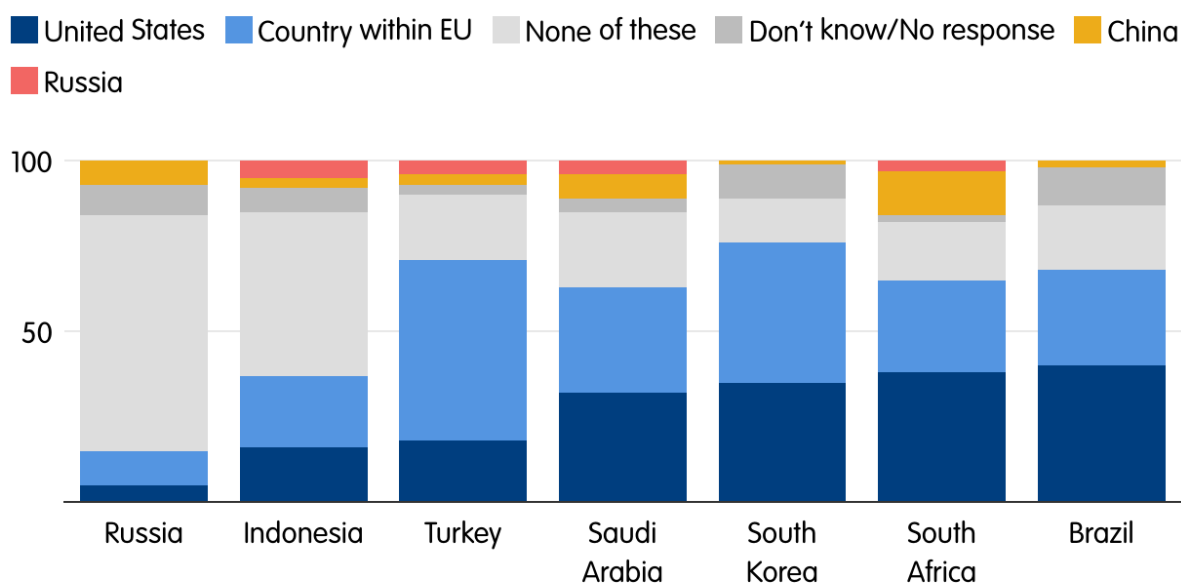
Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023; Standard Eurobarometer 99, Spring 2023.

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Despite these feelings of decline, our poll shows that Western countries – across an array of issues – have much more appeal than many of their inhabitants may think.

One of the most fundamental questions you can ask people is where they would want to live, if they were to emigrate. For people from every continent we polled, the EU and the US appear to be very attractive destinations. When asked which country they would choose if they were to move and start living outside their own country, clear majorities in Brazil, Saudi Arabia, South Africa, South Korea, and Turkey indicated the EU or the US. Russia and Indonesia were the only exceptions. But even there, as elsewhere, few people chose China or Russia. The highest cumulative result for China and Russia was 16 per cent in South Africa, still far below the 65 per cent of people who chose the EU or US in that country.

## If you were to move and start living outside your own country, which of the following countries would you choose? In per cent



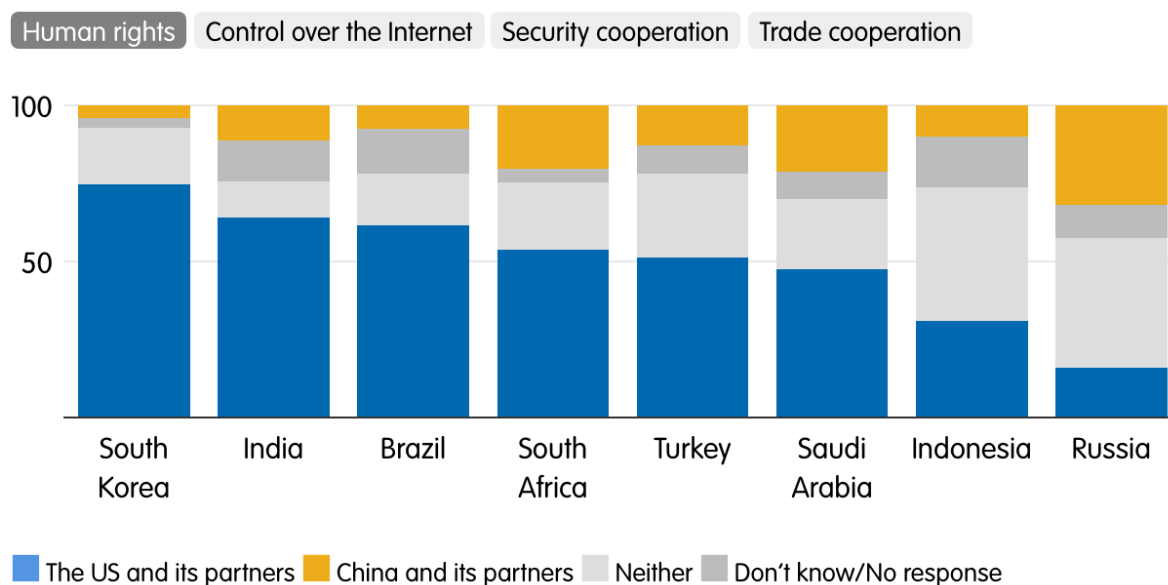
Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

Much of this appeal likely stems from their relative prosperity, including perceptions of economic opportunity and quality of life. But our poll suggests that some of their soft power also derives from the kind of liberal, tolerant, and open societies of which they are made up, and the values that underpin them.

On human rights, for example, clear majorities of people in Brazil, India, South Africa, South Korea, and Turkey would prefer their country to be closer to the US and its allies (that is, the West) than China and its partners. This is even a prevailing opinion in Saudi Arabia, where almost half of the respondents indicated a preference for their country to be closer to Western (47 per cent) instead of Chinese (21 per cent) approaches to human rights. Encouragingly, younger respondents in Turkey and Russia (those aged 18 to 34) are more inclined than older ones to favour the West, not just as a place to live but also in respect of their attitude to human rights.

Similarly, the prevailing preference of people in all the countries surveyed – except Russia – is for their country to be more closely aligned with the United States’ and its partners’ control of the internet, rather than that of China and its allies.

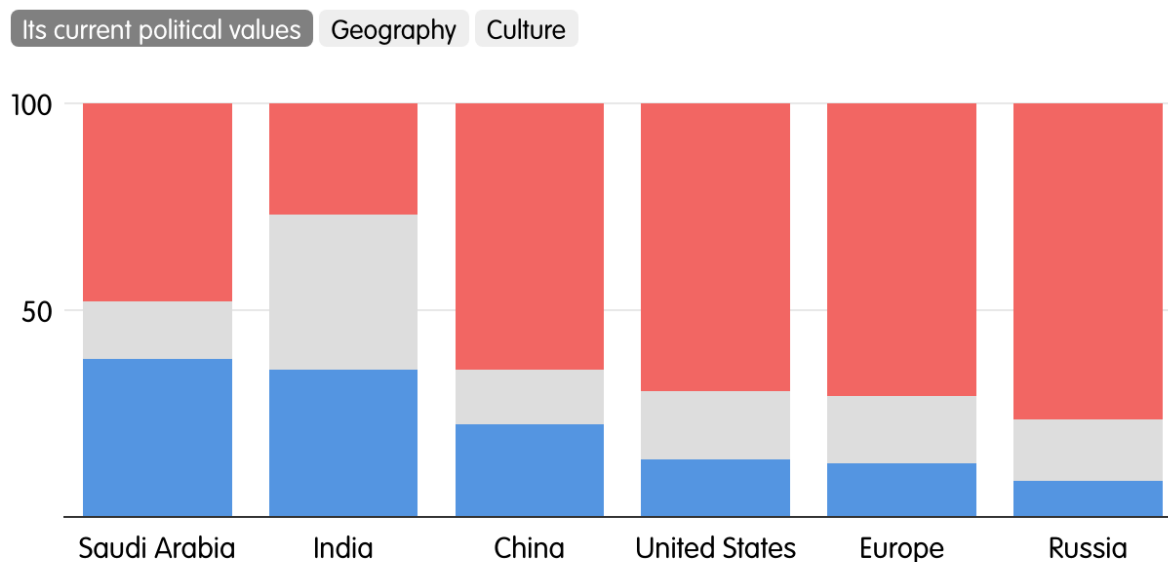
### On human rights, do you prefer your country to be closer to the United States and its partners, or China and its partners? In per cent



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

China and its allies therefore do not compete with the West on soft power; neither does Russia, as its unpopularity as a place to live compared to the US and EU shows. Moreover, for people in many countries around the world, ‘Europe’ appears to be associated not just with a geographical space, but also a set of political values – which Vladimir Putin’s Russia does not share. Clear majorities in China and Russia (and in Europe and the US), as well as 48 per cent in Saudi Arabia, believe that Russia is not part of Europe when it comes to its current political values. Only respondents in India diverge, with 36 per cent saying Russia is part of Europe in this respect, 27 per cent saying it is not, and the rest having no opinion.

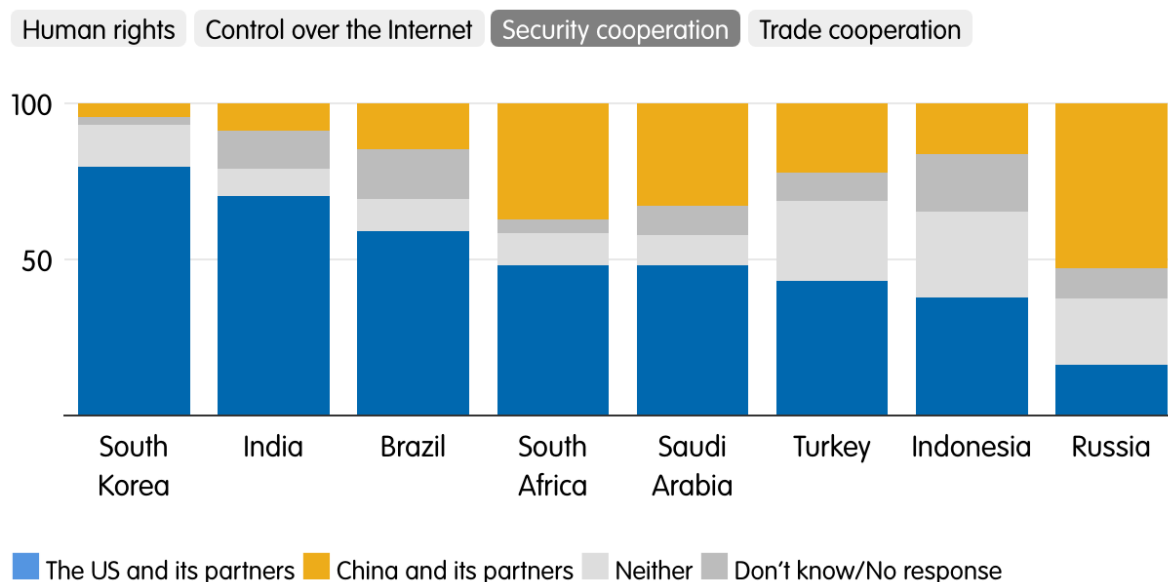
## When it comes to its current political values, would you say that Russia is or is not a part of Europe? In per cent



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

Militarily, the West's hard power seems to be as appealing to people in many countries as its soft power. Clear majorities of people in Brazil, India, and South Korea would prefer their country to cooperate on security more closely with an American bloc rather than a Chinese bloc. This is also the prevailing preference in South Africa, Saudi Arabia, and Turkey, although those three countries are more divided on this point. Russia is the only outlier, with a little over half of respondents (unsurprisingly) choosing a Chinese bloc for security, and just 16 per cent preferring cooperation with the West.

## On security cooperation, do you prefer your country to be closer to the United States and its partners, or China and its partners? In per cent



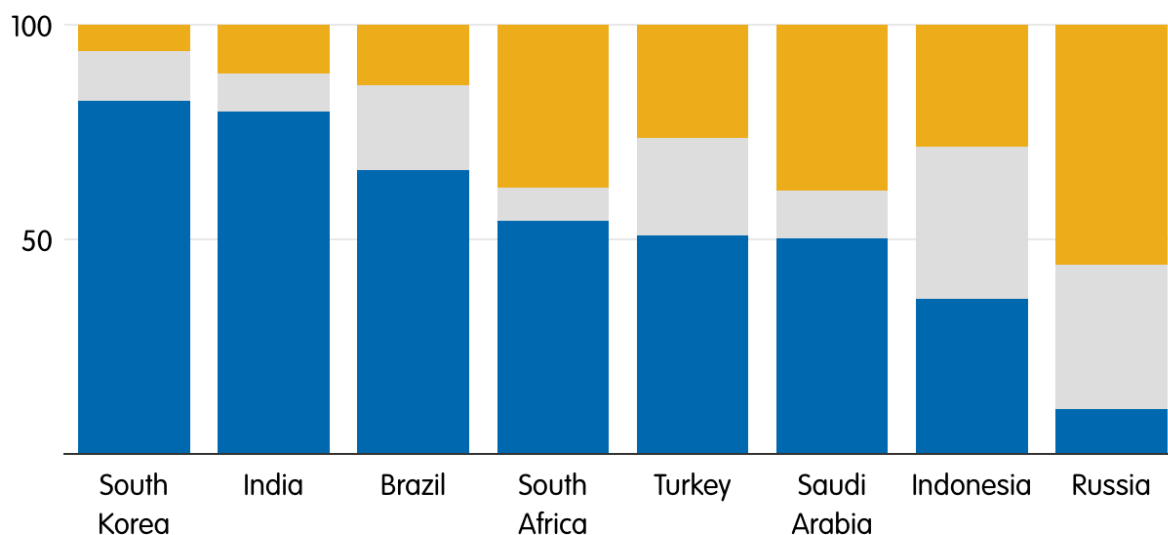
Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

In fact, the only facet of hard or soft power in which China and its allies pip the West is their appeal as economic partners. When asked if they prefer their country to be closer to the American or Chinese bloc on trade, respondents in many countries we polled chose the latter. This is a majority opinion in Russia, but also in Indonesia, Saudi Arabia, South Africa, and Turkey. People in South Korea are divided on this point, while only in Brazil and India did respondents prefer closer trade with a US-led bloc.

Overall, if they were forced to choose, people in almost all of the countries we polled would prefer to be part of an American bloc rather than a Chinese bloc. This is the prevailing view among the people we polled in Brazil, India, South Africa, South Korea, and Turkey. Again, Russia is the only outlier, with a majority of 56 per cent choosing the Chinese bloc. Respondents in Indonesia were divided on this point, with around a third of respondents choosing the US and China, and another third saying “I don’t know”.



**If your country was forced to choose between being part of an American or a Chinese bloc of countries, which would you prefer it to end up in? In per cent**



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecfre.eu

But what is most striking about the results of the poll is that so many people in such a variety of countries appear to think that they can get away without having to choose. Instead, it seems as though they would prefer to combine a Western way of life and US-led security cooperation with China as an economic partner.

That is, they seem to prefer an à la carte arrangement, in which their governments do not have to align and where they can pragmatically pursue their own national interests with different partners on different issues. The US and the EU on one side and China on the other are thus not perceived as competitive political models that a country needs to emulate, but as other great powers with which you can either cooperate or compete – depending on the issue concerned.

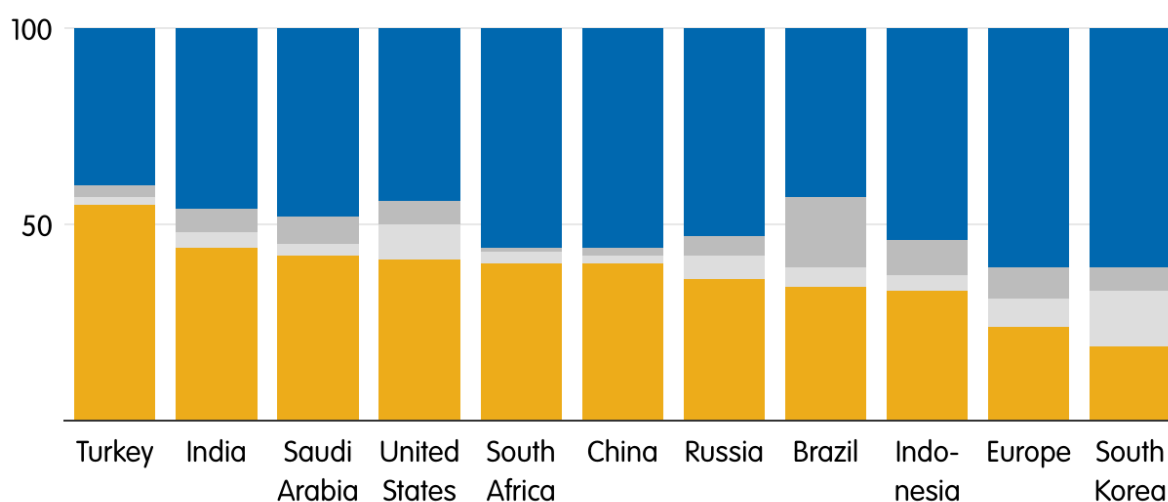
This explains why a degree of dissonance exists between some European and American policymakers and many of the people that we polled around the world. Western policymakers sometimes assume that because other countries have benefited from the existing order, they will be partners in upholding it. Whereas for other countries, the changes that seem like disorder for Western policymakers may look like a reordering that they can use to their own

advantage.

That said, most people in most of the countries we surveyed (except Turkey) say good leaders will prioritise international cooperation over national independence. Europeans and South Koreans stand out as expressing the strongest preference for international cooperation (both at 61 per cent), while respondents in the US are almost equally divided between those prioritising international cooperation and those favouring national independence. (We may imagine which response Donald Trump and his MAGA compatriots would give.)

### A good leader is one who...

■ ...always stands up for my country's independence   ■ Neither   ■ Don't know/No response   ■ ...seeks the best for my country through international cooperation



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

Yet, these findings should give no grounds for Western complacency. In a world in which people in many countries prefer to choose their partners depending on the issue, the insurgent or challenger power does not need to be as attractive as the established one. It just needs to exist to provide a choice. If your government does not think that the West or China will be able to force it to choose sides, then the presence of a Chinese option simply puts it in a better position to bargain with the US and the EU. This strategy is practiced not just by powers outside Europe, but also by European countries such as Serbia, and even EU member states such as Hungary under prime minister Viktor Orban. They all conclude that in an à la

carte world you can have a major economic relationship with China and security relations with the US, while also enjoying what Europe has to offer.

## Selective alignment in a war-torn world

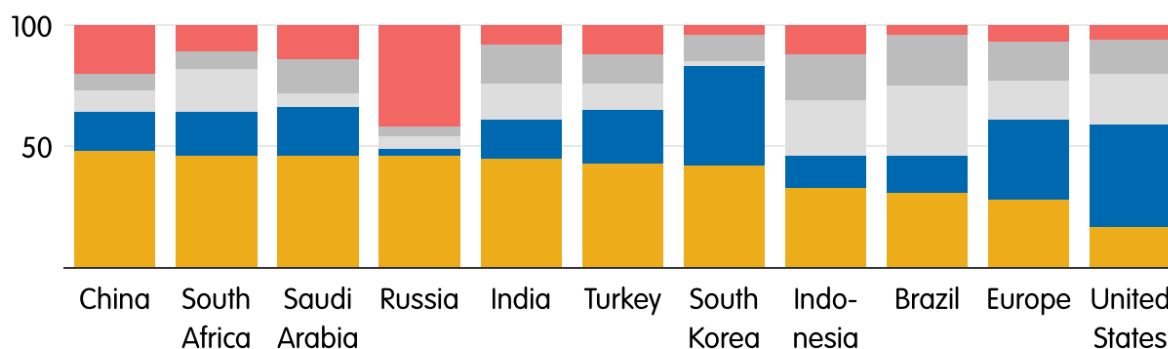
The disconnect between the attractiveness of Western countries (including the political values they espouse), and the willingness of other states to fully align with them, is clearest when it comes to matters of war and peace. Many Western leaders were shocked that their counterparts around the world did not assign the same existential importance to Russia's war on Ukraine as they did, rallying round the US and the EU to protect not only Ukraine but also the principles of the Western-led international order.

The appeal of Western countries and values demonstrated in this poll often does not translate into support for Western policies. As in our previous poll of the CITRUS countries, there remains a clear preference in China, India, and Turkey (and obviously Russia) that the war should end as soon as possible, even if Ukraine has to relinquish control of some of its territory. Our new poll shows that this is also the prevailing view in Brazil, Indonesia, Saudi Arabia, and South Africa.

But this does not mean people in those countries think the war in Ukraine is an occasion to push against the Western dominance of the world; this argument remains popular solely in Russia and nowhere else. But – except for in South Korea – there is equally weak support for the transatlantic proposition of supporting Ukraine for as long as it takes. (Europeans themselves, though, tend to disagree on this point.)

## Which of the following best reflects your view? In per cent

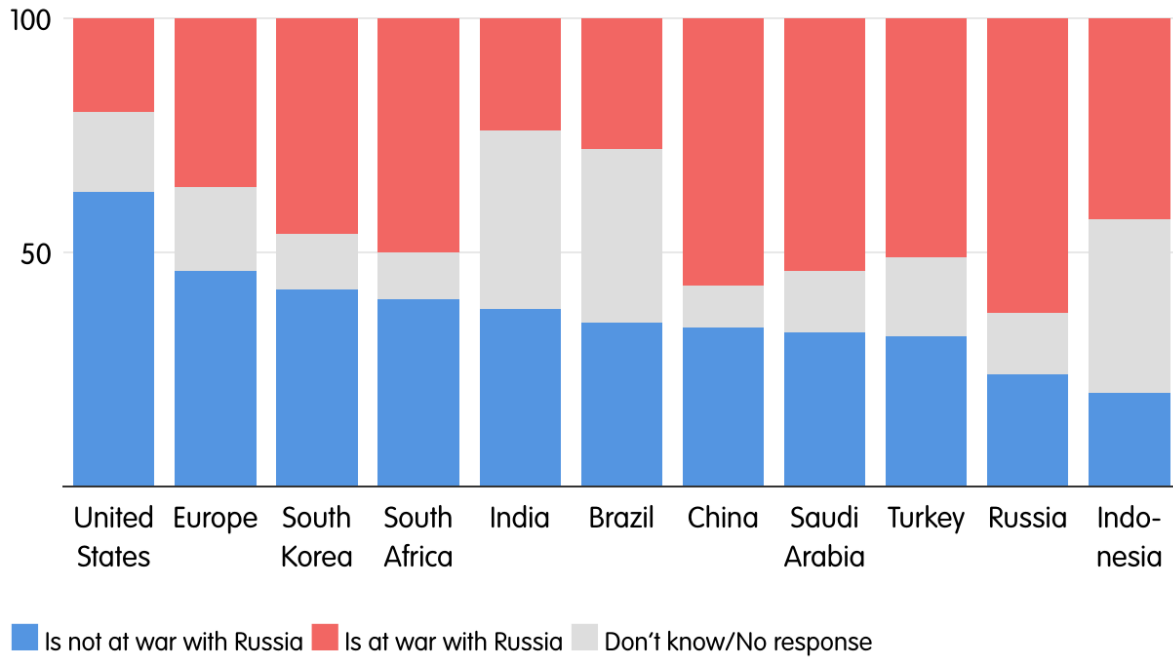
■ The conflict between Russia and Ukraine needs to stop as soon as possible, even if it means Ukraine giving control of areas to Russia 
 ■ Ukraine needs to regain all its territory, even if it means a longer war or more Ukrainians being killed and displaced 
 ■ None of these 
 ■ Don't know/No response 
 ■ Western dominance of the world needs to be pushed back, even if it means accepting Russian territorial aggression against Ukraine



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

Overall, it seems that large numbers of people outside the West appear to think that the war in Ukraine could be less of a moral struggle than a proxy war between great powers. Majorities in China, Russia, Saudi Arabia, and Turkey believe the US and Russia are at war. People in the US and Europe are joined only by those in India and Brazil in having a prevailing view that the US is not at war with Russia (though there are countries in Europe where the opposite view prevails).

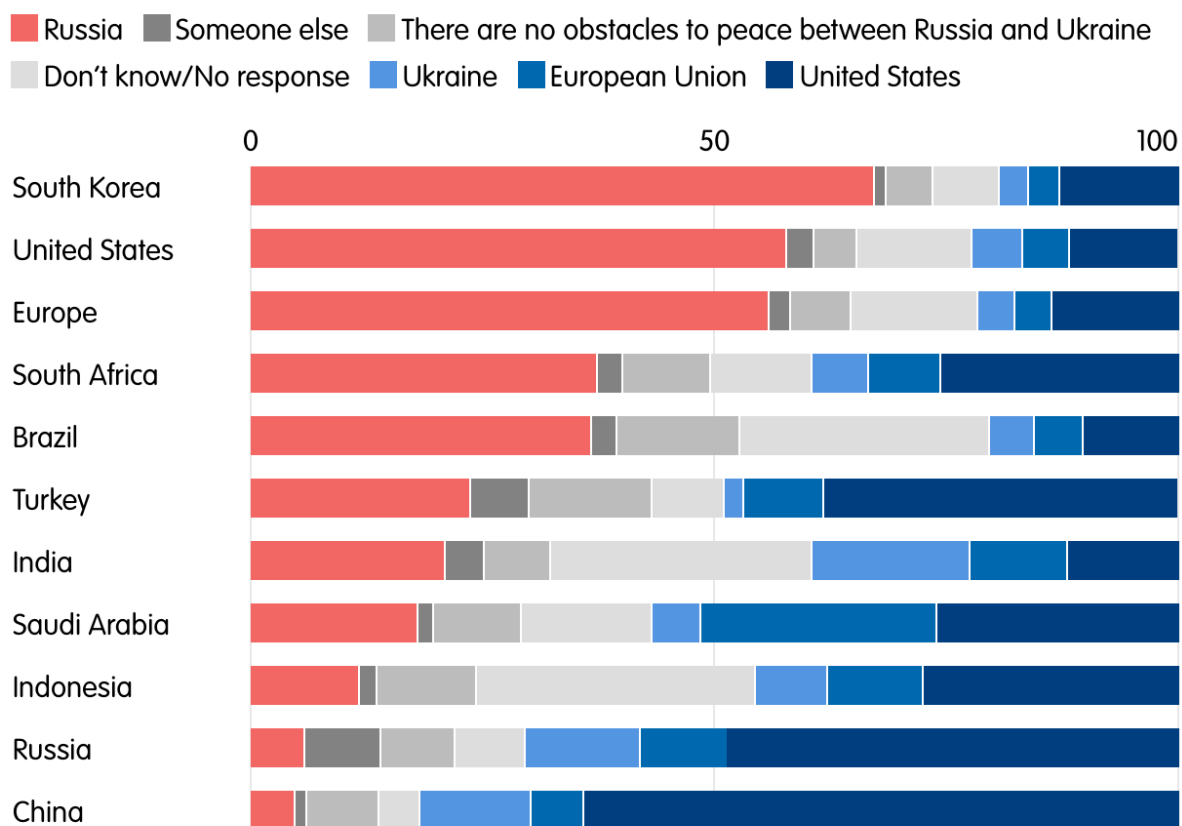
## Is the United States at war with Russia? In per cent



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

People in many of these countries also do not accept that Russia is at fault for perpetuating the war. Indeed, Europe, the US, and South Korea are the only places where a clear majority of respondents say that Russia constitutes the biggest obstacle to peace between Russia and Ukraine. The West (Ukraine, the EU, or the US) is seen as a bigger problem not just by people in Russia and China, but also by those in India, Indonesia, Saudi Arabia, and Turkey.

## Which of the following, if any, is the biggest obstacle to peace between Russia and Ukraine? In per cent



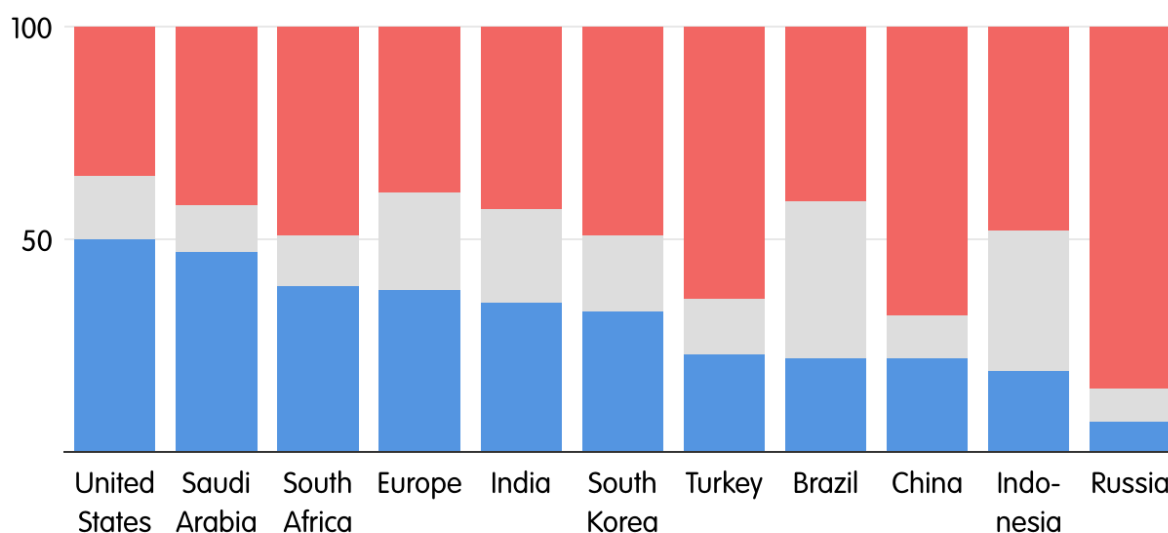
Source: Datapraxix and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxix and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

But the problem is not just that many people appear not to support the West's cause. It is also that they seem to doubt its ability to determine the outcome. Majorities in Russia, China, India, Indonesia, Saudi Arabia, South Africa, and Turkey believe it is likely that Russia will win its war in Ukraine within the next five years.

Only in the US does a view clearly prevail that Ukraine will win this war. Even in Europe, 30 per cent of respondents expressed a view that Russia is likely to win the war within five years, while only 38 per cent say that Ukraine is likely to win. This is sobering news not just for Ukrainians, but also for everyone who believes that a Ukrainian victory is essential for the future of European and international order.

## How likely or unlikely it is that, within the next 5 years, Ukraine wins the war with Russia? In per cent

Click to change view: **Ukraine wins** Russia wins

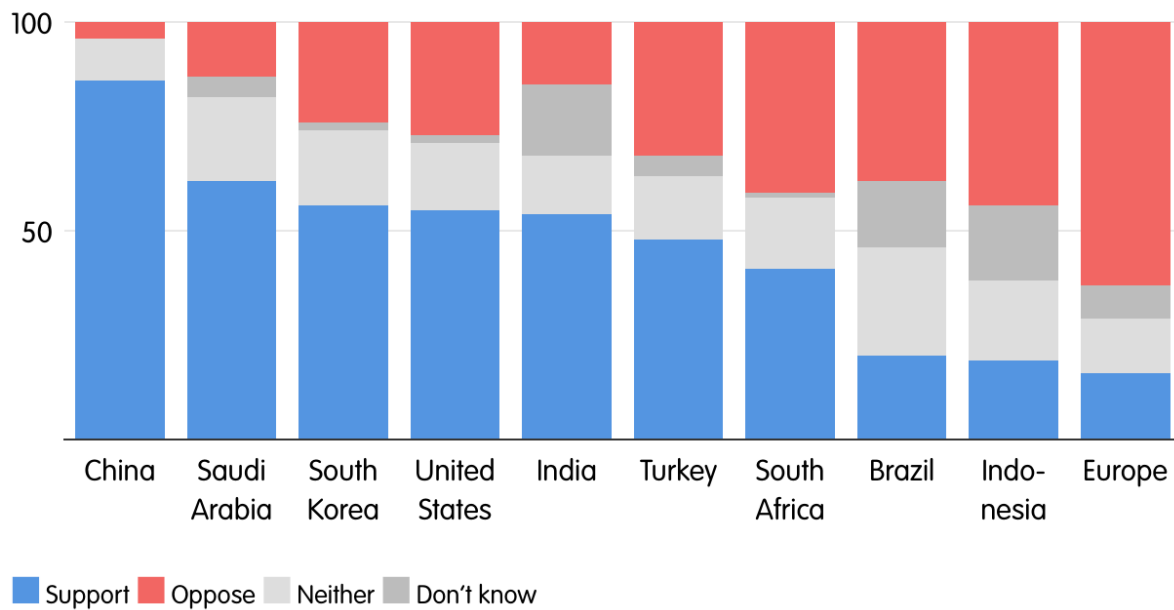


Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

This general sense of global insecurity and loss of faith in the West to order the world has implications well beyond Ukraine. Many people support their countries having access to nuclear weapons, perhaps seeing this as the only sure way to protect their national sovereignty in this more dangerous world. Ukraine, after all, gave up its nuclear weapons in the 1990s in return for security assurances from the US, Russia, and the United Kingdom. The spectacle of Russia's brutal violation of those assurances may have contributed to people believing that only nuclear weapons can ensure their country's security.

In recent months, two powerful EU member states, France and Germany, have been locked in a bad-tempered argument about the acceptability of even civil nuclear power. Meanwhile, majorities in China, India, Saudi Arabia, South Korea, and the US believe that their own country should have access to nuclear weapons. Only in Brazil, Europe, and Indonesia does a clear majority oppose gaining nuclear weapons.

**To what extent, if at all, do you support or oppose your country having access to nuclear weapons?**

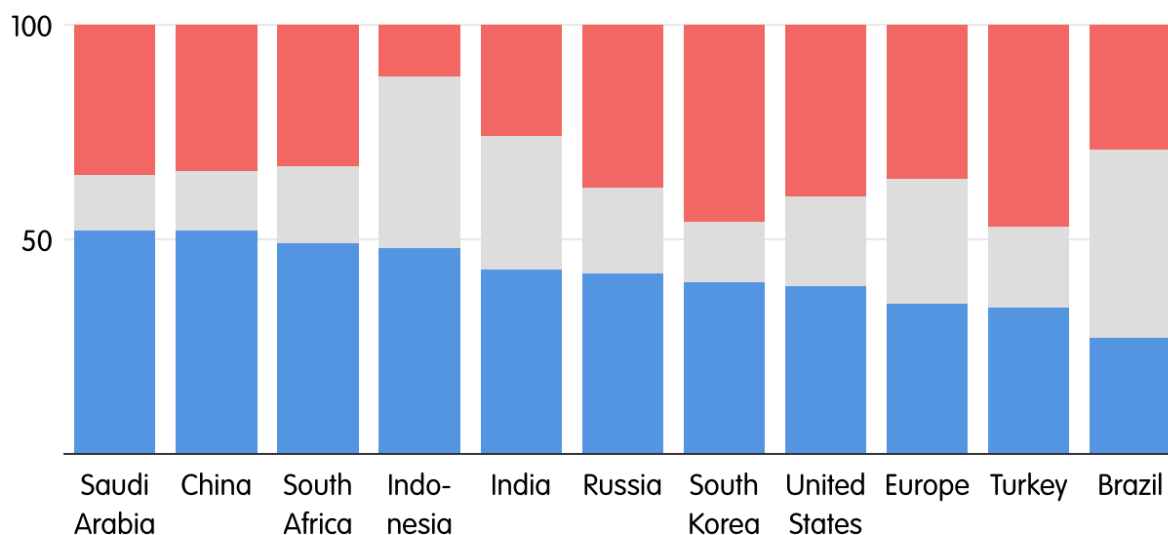


Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

This loss of faith in the West will likely also resonate in other theatres as well. There is, after all, a third potential major war, an armed conflict between the US and China over Taiwan. No less than 52 per cent of Chinese believe this is likely, as do 39 per cent of Americans and 35 per cent of Europeans.



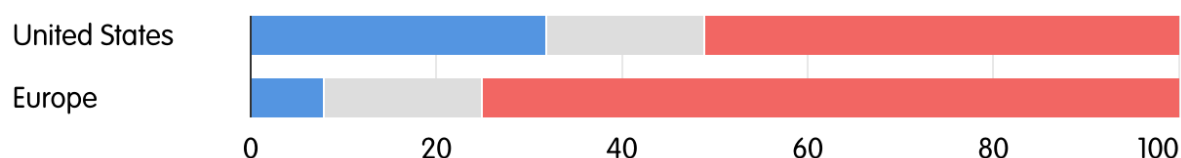
**Looking ahead, how likely or unlikely it is that, within the next 5 years, the United States and China enter into a direct military confrontation over Taiwan? In per cent**



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

But when it comes to a potential conflict with China over Taiwan, not even Europeans are ready to commit to their transatlantic ally. In fact, previous ECFR polling, conducted earlier this year, showed that an average of 62 per cent of people across 11 EU member states would prefer to remain neutral in such a conflict – while only 23 per cent would be ready to support the US. In the latest poll, just 8 per cent of Europeans said they would support troops from their country fighting in a future war over Taiwan, compared to 32 per cent of Americans, although in both places a majority opposed such a scenario.

## To what extent, if at all, would you support or oppose troops from your country fighting in a future war over Taiwan? In per cent



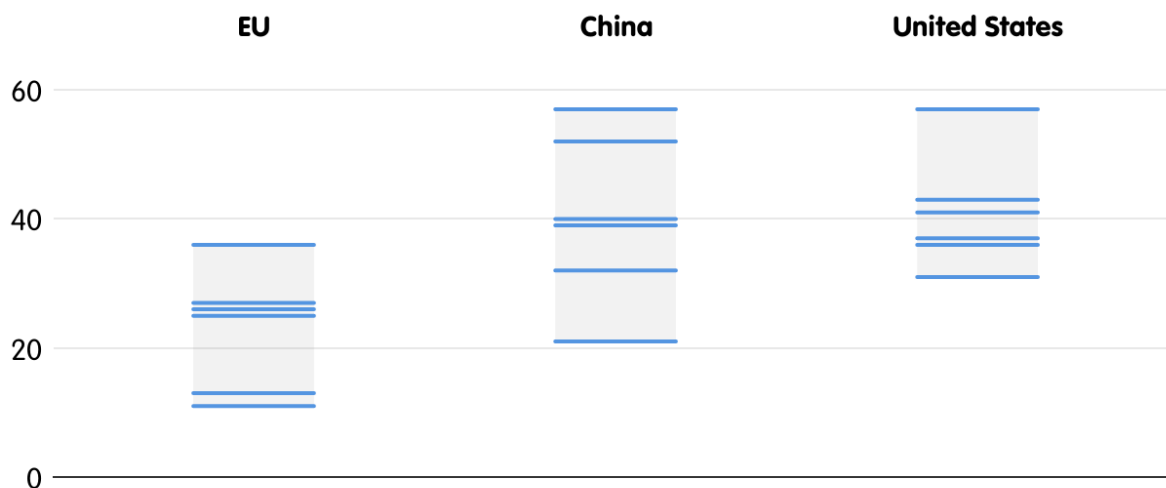
Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023.  
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## When soft power is not enough

Some Europeans experience the current geopolitical shifts not simply as a crisis of the international order but also as an identity crisis. In the post-cold war period up to 2022, they had hoped not only that their continent would now truly be one of peace, but also that it was going to shape the rest of the world in its own image – a model of post-national, law-abiding multi-level governance. Little remains of that hope, and our polling indicates that (when Europe is separated from the US) people in the rest of the world appear to be distinctly unimpressed by the EU’s hard power and the bloc as a geopolitical actor.

When asked in an earlier ECFR poll what word best describes various countries and regions, respondents from across the world rarely described the EU as “strong”. In every country polled, respondents were less likely to view the EU as “strong” than the US and China. In fact, the US was above all seen as “strong” in all countries except for Russia. People in China itself, as well as India, Russia, and Turkey usually described China as either “strong” or “rising” (or both in India). Meanwhile, responses concerning the EU were usually more dispersed, with relatively fewer people indicating they consider the bloc as “strong”.

## Which of the following words do you think best describe the EU, China, and United States? "Strong", in per cent



Respondents could pick up to 2 out of 11 available options: rising, declining, peaceful, strong, weak, trustworthy, untrustworthy, aggressive, hypocritical, principled, do not know / none of these.

Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain), Datapraxis and Norstat (Estonia), Gallup International Association (China, India, Russia, Turkey, United States), December 2022/January 2023.

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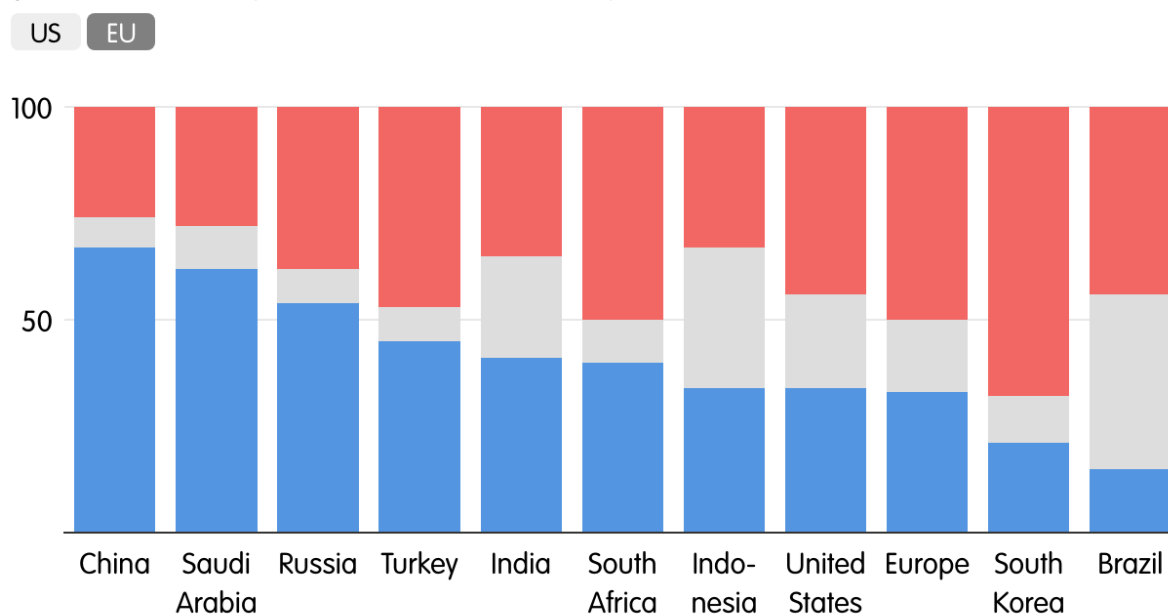
Nevertheless, our new poll shows that the EU has huge reserves of soft power. None of the non-Western great powers can compete with it when it comes to the power to attract. But it is also clear from [other research](#) by Oxford's Europe in a Changing World project that most people in the CITRUS countries see Europe not as a single homogenous unit, let alone simply as the EU, but above all as a number of major European countries, such as France and Germany – also usually including the UK, despite its departure from the EU.

Unfortunately, even this power to attract could now be a problem for Europe, as resistance to immigration [likely contributes](#) to driving voters in some countries towards xenophobic populist nationalist parties. The attractiveness of western European countries' prosperity is also sucking people from countries like Lithuania and Bulgaria. Unless the war in Ukraine ends with a clear victory and a huge effort of reconstruction, the same may also be true, on an even larger scale, for Ukraine.

Moreover, our findings suggest that people outside Europe distinguish sharply between the attractiveness of Europe as a place to visit and live, and the power and resilience of the EU as a political project. This is evidenced in the fact that a remarkably large number of people

outside Europe believe the EU will fall apart within the next 20 years. This is a majority view in China, Russia, and Saudi Arabia – but elsewhere many people believe this too, including no less than a third of Americans. Shockingly, a third of the Europeans we polled also believe this – although 50 per cent disagree. Interestingly, the EU is not seen as uniquely vulnerable. Many people across the world – including majorities in China and Saudi Arabia, and over 40 per cent in Russia and Turkey – also believe that the US could stop being a democracy within the next two decades.

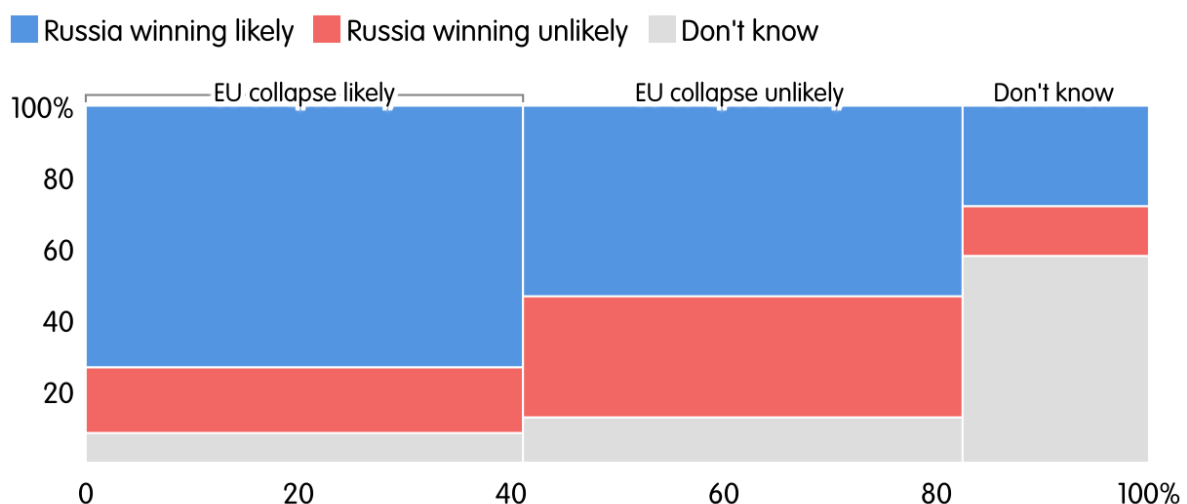
### Looking ahead, how likely do you think it is that in the next twenty years the European Union will fall apart? In per cent



Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

How people in the rest of the world feel about the EU’s future correlates with whether they believe Russia is likely to win its war in Ukraine or not. Outside Europe, 73 per cent of those seeing EU collapse as likely also expect a Russian victory, compared to 53 per cent of those who see EU collapse as unlikely. While the majority of both groups expect Russia to win, this is a much more dominant perspective among those who also expect the EU to collapse. This correlation is most noteworthy in China, South Africa, South Korea, and the US, but it is also visible in Brazil, Saudi Arabia, and Turkey. Moreover, the 14 per cent of non-European respondents who see the EU’s collapse as “very likely” also stand out in seeing, in their majority, a Russian victory as “very likely” too (52 per cent).

### Outside Europe: Perceived likelihood of Russia winning based on whether EU collapse seen as likely or not. In per cent

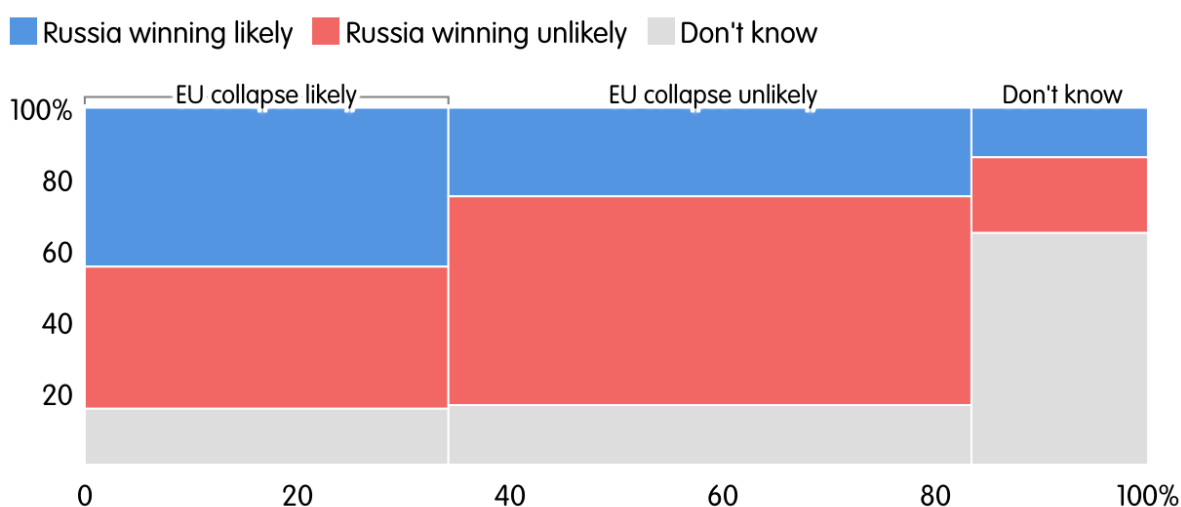


Taking jointly respondents from China, India, Russia, Turkey, United States, Brazil, Indonesia, Saudi Arabia, South Africa, and South Korea.

Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecfre.eu

It is therefore plausible to argue that the EU's own credibility is at stake in the outcome of the war in Ukraine. And this is not just its credibility in the eyes of the rest of the world, but also in those of Europeans themselves. While the majority of European respondents who do not think the EU will fall apart in the next 20 years also doubt the likelihood of Russia winning in the next five, a plurality of those who believe the EU will fall apart also think that Russia will win the war.

### Inside Europe: Perceived likelihood of Russia winning based on whether EU collapse seen as likely or not. In per cent

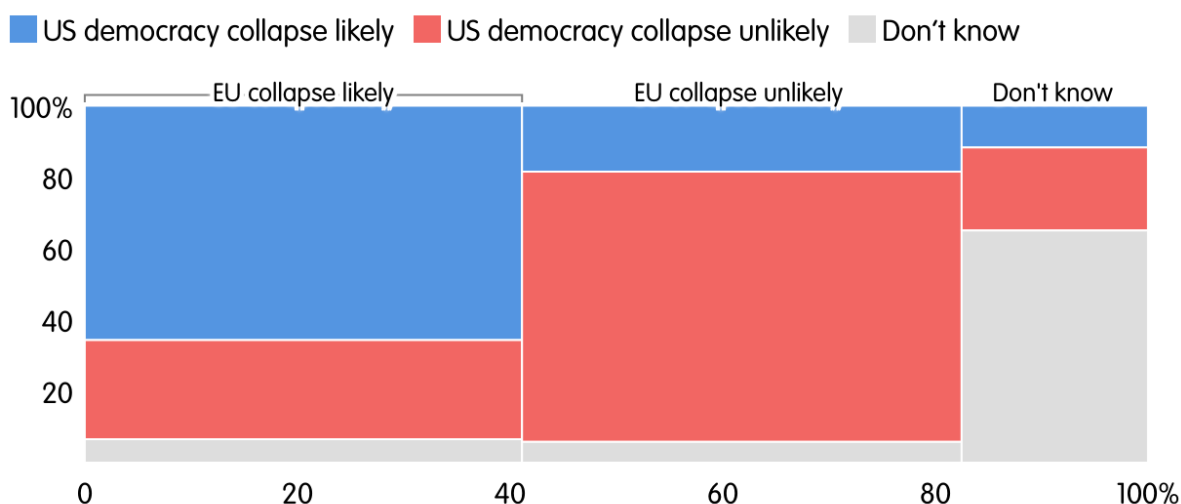


Taking jointly respondents from China, India, Russia, Turkey, United States, Brazil, Indonesia, Saudi Arabia, South Africa, and South Korea.

Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023.  
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An even stronger correlation exists, both inside and outside Europe, between people's expectation of the EU falling apart and the United States' democracy collapsing. Among the non-European public, two-thirds of those expecting the EU to fall apart are also of an opinion that the US could stop being a democracy in the next two decades. Meanwhile, among those who doubt the EU will fall apart, three-quarters see the US democracy as resilient too. This pattern is particularly stark among the publics of China, India, Indonesia, Russia, Saudi Arabia, South Africa, and Turkey – but it is also visible elsewhere, including in Europe. These opinions therefore could be connected to a general perception of Western political systems, whether America's democracy or Europe's union.

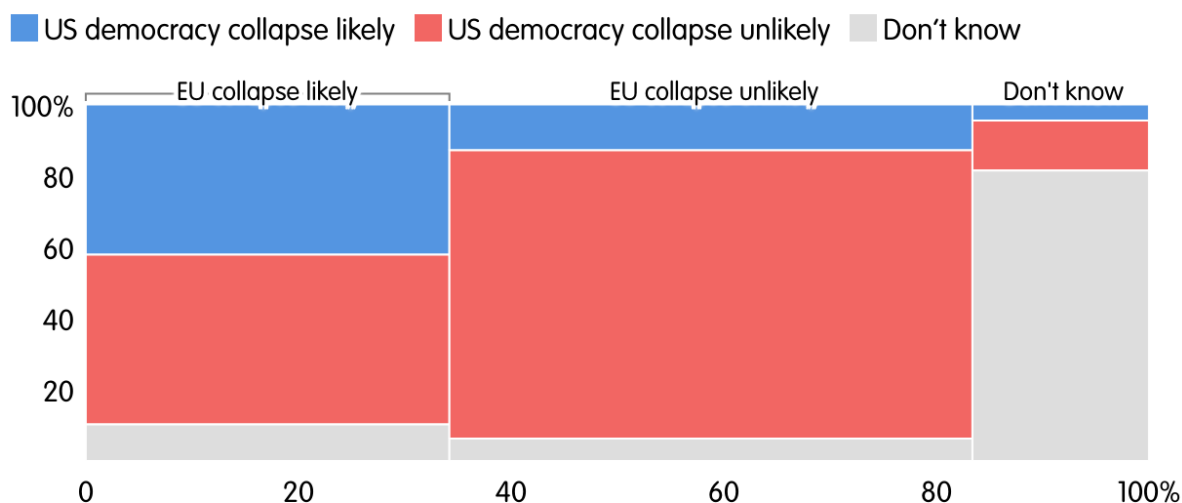
### Outside Europe: Perceived likelihood of US democracy collapsing based on whether EU falling apart seen as likely or not. In per cent



Taking jointly respondents from China, India, Russia, Turkey, United States, Brazil, Indonesia, Saudi Arabia, South Africa, and South Korea.

Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023.  
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## Inside Europe: perceived likelihood of US democracy collapsing based on whether EU falling apart seen as likely or not. In per cent



Taking jointly respondents from China, India, Russia, Turkey, United States, Brazil, Indonesia, Saudi Arabia, South Africa, and South Korea.

Source: Datapraxis and YouGov (Denmark, France, Germany, Great Britain, Italy, Poland, Portugal, Romania, Spain, Switzerland), Datapraxis and Norstat (Estonia), Gallup International Association (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, United States), September/October 2023. ECFR · ecf.eu

## Conclusion

For people across the world, European countries seem to be very attractive in terms of their way of life and value systems. But, when considered independently from their partner across the Atlantic, they appear to lack the accompanying hard power to protect European interests and values in a world of competing great and middle powers – and of wars.

Both Russia's war against Ukraine and the Israel-Hamas war will affect Europe more directly than they will the US. A Russian victory in Ukraine would be experienced as an existential threat by most central and eastern European countries, while the conflict in the Middle East could threaten the internal stability of western European countries with sizable minority populations.

“A geopolitical EU” remains little more than a slogan. And, when push comes to shove, people turn back to the US for ultimate reassurance: an ECFR poll from 2020, for example, demonstrated that a majority of Europeans continue to consider the US security guarantee as



necessary to be safe from military invasion. But in an à la carte world, no single great power will be able to impose its wishes on the rest of the world.

At the moment, Europeans are caught between two rival strategies. On the one hand are those who cleave to the idea of a bipolar world of democracies versus autocracies, and think Europe's destiny is to align as closely as possible with the US, the power with which they share the most values. But while the Biden administration has been crucial in defending Ukraine, and the US will continue to be the most like-minded great power, our polling suggests that the world is unlikely to split into two clear-cut camps.

Moreover, US domestic politics continues to be hyperpolarised, and future US presidents will likely be less attuned to European values and interests. That would become dramatically apparent if Donald Trump were re-elected next year for a second term. Even if Trump is not re-elected, the United States' shifting focus to China will mean that it is by necessity less invested in Ukraine than Europeans, in whose continent that country lies.

On the other hand, those who call for 'strategic autonomy' are more likely to divide Europe than to unite it. The slogan has come to be seen as anti-American and to reveal a preference for acting alone rather than in concert with its transatlantic partner. In any case, the EU's insistence on being a strong and autonomous geopolitical player is certain to backfire if it is divorced from any real capacity to make a difference.

At ECFR, we have suggested that an alternative approach might be to pursue a policy of "strategic interdependence". On the one hand, this recognises that the EU will never be capable of self-sufficiency and has a desire for interdependence in its DNA. On the other hand, the EU needs to do much more to make itself into a geopolitical actor. With the war in Ukraine revealing Europe's energy dependence on Russia and the covid-19 pandemic revealing its dependence on supply chains from China, the EU cannot be naive about the vulnerabilities that come from asymmetric dependence. This is why it makes sense to diversify its relationships and develop a response to China's dual circulation and the United States' industrial policy. This is the economic aspect of hard power.

It is also high time that Europeans invest more in the military and security dimensions of hard power, building on what they have already done to support Ukraine. A successful further eastward enlargement of the EU, even before the war in Ukraine has reached a conclusion, would also make the EU more powerful and credible in a world of fierce geopolitical and geoeconomic competition.

Rather than clinging to an old set menu of alignments, European policymakers need to seek new partners on crucial issues in this à la carte world.

## Methodology

This report is based on a public opinion poll of adult populations (aged 18 and over) conducted in September and October 2023 in 11 European countries (Denmark, Estonia, France, Germany, Italy, Poland, Portugal, Romania, Spain, Switzerland, and Great Britain), and 10 non-European ones (Brazil, China, India, Indonesia, Russia, Saudi Arabia, South Africa, South Korea, Turkey, and the US). The total number of respondents was 25,266.

Outside Europe, the polls were conducted by Gallup International Association through a network of independent local partners and cross-country panel operators as an online survey in Brazil (1,003; 19 September – 3 October; through Voices!), China (1,006 respondents; 19-28 September 2023; through Distance/Dynata), Indonesia (1,000; 8 September-3 October; through DEKA), Russia (1,000; 19-27 September; through Be Media Consultant), Saudi Arabia (1,012; 19-27 September; through Distance/Dynata), South Africa (1,005; 19-28 September; through Gallup International GmbH), and South Korea (1,000; 18-27 September; through Gallup Korea), Turkey (1,000; 19-29 September; through Distance/Dynata), and the US (1,033; 19 September; through Distance/Survey Monkey), and through face-to-face surveys in India (1,126; 18 September-3 October; through Convergent). The choice of face-to-face surveys in India was directed by the poor quality of internet in India's smaller cities.

In Brazil, Indonesia, Saudi Arabia, South Africa, South Korea, Turkey, and the US the sample was nationally representative of basic demographics. In China, the poll included panelists from the country's four biggest agglomerations only: Beijing, Guangzhou, Shanghai, and Shenzhen. In India, rural areas and tier-3 cities were not covered. And in Russia, only cities of more than 100,000 inhabitants were covered. Therefore, data from China, India, and Russia should be considered as representative only for the population covered by the poll. Last but not least, considering the poll's scope and questionnaire, the results from China, Russia, and Saudi Arabia need to be interpreted with caution, bearing in mind the possibility that some respondents might have felt constrained in expressing their opinions freely.

In this policy brief, the results for 'Europe' correspond to a simple average across the above-mentioned 11 European countries, unless stated otherwise.

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