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IDEAS SHAPING THE WORLD



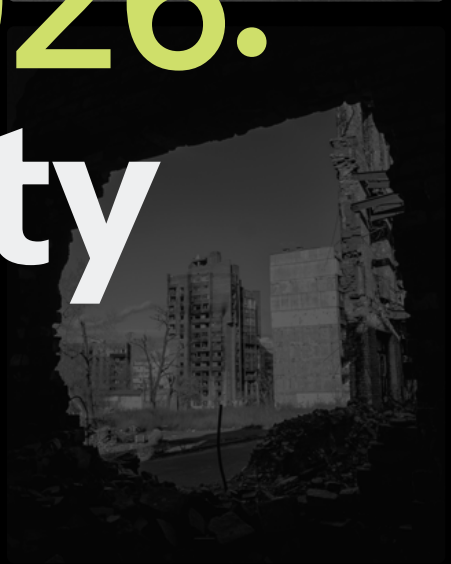






GLOBSEC Trends 2026: The Reality Check

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GLOBSEC Trends 2026

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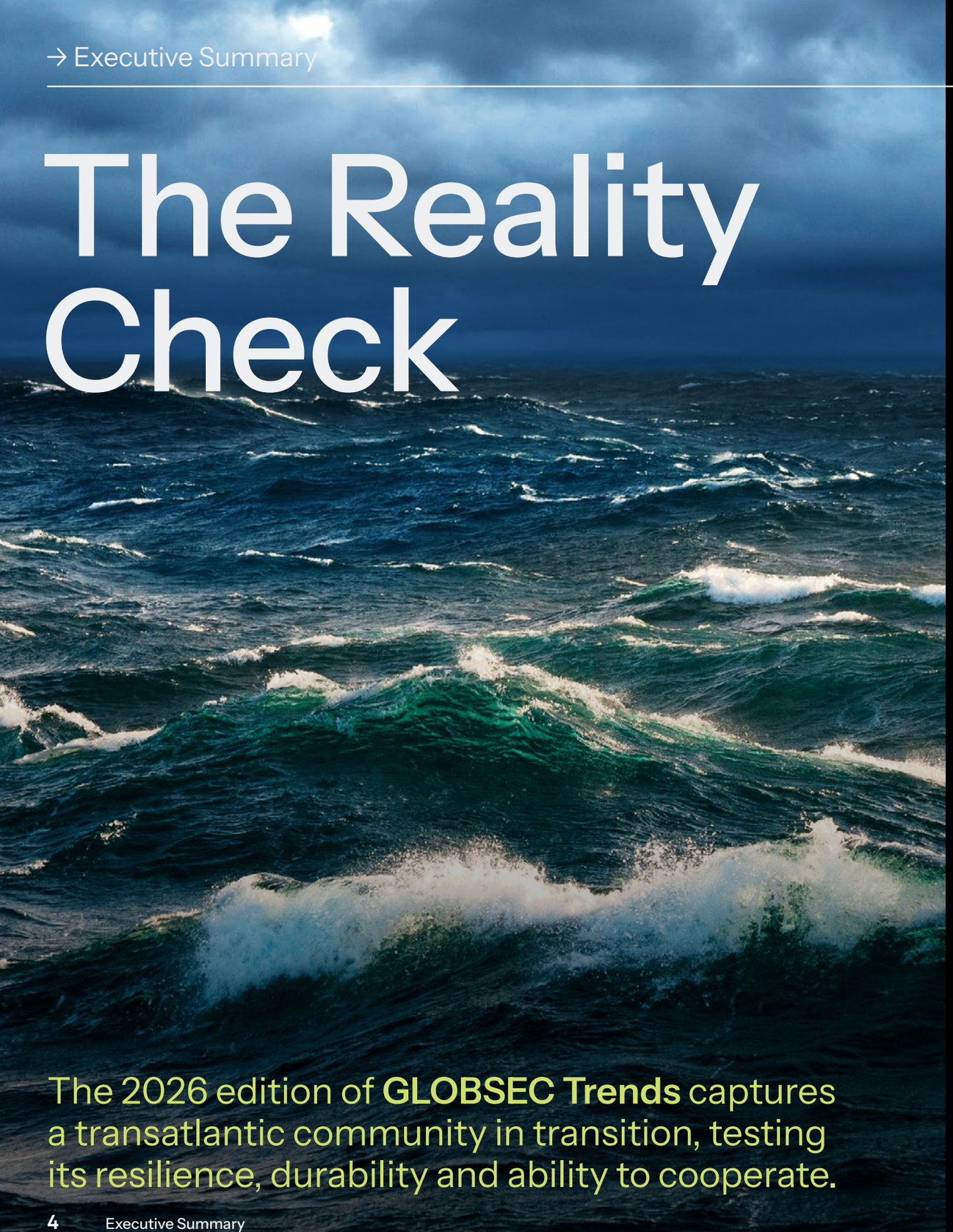
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The data collection was conducted in May 2026 by HarrisX. We would like to thank HarrisX for their support, which not only ensured continuity of the Trends but also allowed expansion beyond Central and Eastern Europe.

The Reality Check



The 2026 edition of **GLOBSEC Trends** captures a transatlantic community in transition, testing its resilience, durability and ability to cooperate.

The first test is in defence and deterrence, where the central challenge is turning political commitment into capabilities and preparedness. Four years into Russia's full-scale invasion, the war in Ukraine continues to strain Europe's security, while Moscow grows increasingly aggressive towards the Alliance. Governments are raising defence spending to levels that would have been unthinkable a decade ago, to build modern armed forces and resilient infrastructure, while also seeking to keep backing Ukraine over the long term.

At the same time, the relationship between Europe and the United States is being redefined. Long-standing assumptions about security guarantees, trade and shared values are being tested, while the US itself debates how much of the post-war order it still wants to carry. This rebalancing is also an opportunity for Europe to become a stronger and more capable ally, carrying more of the burden within a partnership that remains vital to both sides of the Atlantic.

Technology, meanwhile, is changing both geopolitics and societies. Control over critical technologies, from semiconductors to artificial intelligence, has become a source of power and an arena of competition between states. Within societies, the shift is just as profound - platforms where citizens form their views are owned by private companies whose power over public debate has outpaced the rules that hold them accountable. At the same time, AI is transforming how people work, access information and engage in politics.

Across the transatlantic space, political frictions are deepening, giving rise to actors keen to challenge democratic norms and rethink where Europe's partnerships lie. Together, these changes are rewriting the social contract: readiness cannot be built by public institutions alone, but depends on citizens who are willing to contribute and on governments that earn their trust. To understand where that support stands, GLOBSEC Trends 2026 surveyed 14 countries across the transatlantic space: Bulgaria, Czechia, Estonia, France, Germany, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Ukraine, the United Kingdom and the United States.
With major elections approaching on both sides of the Atlantic, the findings of this report serve as a reality check. They show which policies and actions societies are ready to support, and where governments and policymakers must do more to turn political ambition and rhetoric into readiness to face current and upcoming crises.

1 Europe wants to stand taller, inside NATO

Public opinion backs Europe's rearmament. 78% in EU member states want Europe to build its own defence capabilities, and 71% would welcome a European army. It does not, however, mean walking away from NATO, as 78% in European NATO member states would vote to stay in the Alliance. Support for higher defence spending is more limited. Across the European NATO members surveyed, it falls from 61% to 44% if it means cuts to healthcare or social security.





2 Willing citizens, unprepared states

Public readiness to contribute to national defence stands in stark contrast to perceived state readiness. Across the 14 surveyed countries, 62% would defend their country if it were attacked, but only 34% believe their country is prepared for a major security crisis or war. Public opinion is no obstacle to military service: majorities in 9 of the 10 countries where the question was asked back reintroducing or expanding compulsory military service.

3 US role valued, reliability questioned

77% in Europe consider the US role in European security important, and 65% view the US military presence in Europe positively. Confidence in the partnership, however, is lower, with only 54% seeing the US as a reliable partner and 35% regarding the US as a security threat to their country.

4 Europe wants to carry more of the burden

83% of EU respondents agree that Europe should take on more responsibility if the US reduces its role. Across the Atlantic, the expectation of a shift is shared: 65% of US respondents believe the US pays an unfair share of Europe's defence. Confidence, however, lags behind Europe's commitment: only 49% in Europe believe European countries could ensure their own security without strong US support.

5 US unilateral actions divide the transatlantic community

European respondents broadly reject recent US actions taken without allies: 78% oppose the US attempt to acquire Greenland, and 73% view its military interventions abroad negatively. US opinion is divided, both on these actions and on the country's role in the world: 54% want the US to uphold the post-war order of alliances and multilateral cooperation, while 46% would rather it focus on its own interests.

6 Democracy supported, but underdelivering

Democratic resilience is currently tested by a profound performance gap. While 84% say democracy based on the rule of law is good for their country, views on how it performs are mixed: only 8% consider their own democracy fully functioning, another 52% say it works despite problems, and 41% see major dysfunction or do not consider their country a democracy at all. Most see the main threats as domestic: with corruption, economic inequality, and executive overreach dominating.

7 Russia seen as a threat, yet propaganda has taken root

68% see Russia as a threat to their country's security. Yet four years into the full-scale invasion, the Kremlin's justifications for the war remain widespread. On average, 37% agree that alleged oppression of Russian speakers in Ukraine justified the invasion, and 35% believe Europe and the US provoked it. Where Kremlin-originated narratives are most widespread, support for military aid to Ukraine is weakest.



8 Support for Ukraine holds, but views on peace terms divide

62% of respondents in Europe believe Europe should continue supporting Ukraine regardless of US involvement, and 76% of US respondents agree. 82% across the surveyed countries insist that any peace settlement must provide credible long-term security for Ukraine, but opinion splits over territory. In the countries bordering Russia or Belarus, 42% accept that Ukraine should be ready to give up part of its territory for a lasting peace, compared with 59% in the other surveyed countries.

9 AI viewed positively, feared for consequences

71% are familiar with AI and 61% view it favourably, yet only 16% are excited about it. Acceptance comes with unease about the consequences. 77% believe AI will replace more jobs than it creates, a bleaker outlook than employers project, and 61% expect it to cause less global stability. Unease is highest in the West, with Central and Eastern Europe being more optimistic, especially Ukraine.

10 West and East see different threats

Russia is seen as the main threat across most surveyed countries, but views of other powers differ sharply. 60% in the US, UK, France and Germany see China as a security threat, compared with 34% in CEE, and the pattern is similar for Iran and North Korea. Respondents in the West are also more critical of the US. Around half in Germany, France and the UK see it as a security threat, compared with 31% in CEE.

1 Link defence budgets to local industrial growth

Public scepticism about the economic benefits of defence investment remains significant, particularly across much of CEE. Governments should frame the investments not only as a response to external threats, but as a driver of economic resilience and growth, contributing to local job creation.



2 Close the preparedness gap

Willingness to defend one's country is shared by a majority, but fewer respondents feel that their state and they personally are prepared for a major crisis. Governments should issue clear household emergency guidance, run regular community-level exercises and decentralise emergency stockpiles. Treating preparedness as an everyday public service built on practical steps, rather than an abstract military mandate, has the potential to rebuild civic trust and secure a coordinated civilian response in a real crisis.

3 Make energy security affordable

Support for ending Russian energy imports weakens when households face high prices, which suggests that cost weighs heavily in how the public judges security. Governments should pair decoupling from Russian supplies with measures that keep energy affordable, including targeted support for vulnerable households and faster investment in grid infrastructure, interconnections and storage. Modern and resilient grids reduce both price volatility and exposure to coercion and sabotage. Benchmarks such as the GLOBSEC Grid Transition Index[1] can help identify where investment is needed most urgently.

4 Make democratic resilience about delivery

Respondents see the main threats to democracy as internal: corruption, inequality and the weakening of checks and balances. Widespread distrust in how democracy delivers, combined with openness to non-democratic alternatives, requires a two-pronged strategy. Governments must pair tangible performance, including rigorous anti-corruption enforcement, judicial independence and visible service delivery, with proactive public communication that exposes the corruption, economic instability and repression common in authoritarian regimes.





5 Sustain trusted journalism

Social media now rivals television as a source of news, even though trust in it remains low. The challenge is not only how journalism communicates, but whether it can survive financially as audiences and advertising revenue move to platforms. Governments and institutions should support sustainable funding models for independent media, including public support schemes that safeguard editorial independence. Newsrooms, in turn, should invest in short-form video, conversational formats and audience engagement while keeping clear editorial standards. Otherwise, audiences risk being left with influencer content as their main source of news.

6 Govern AI as a societal shift

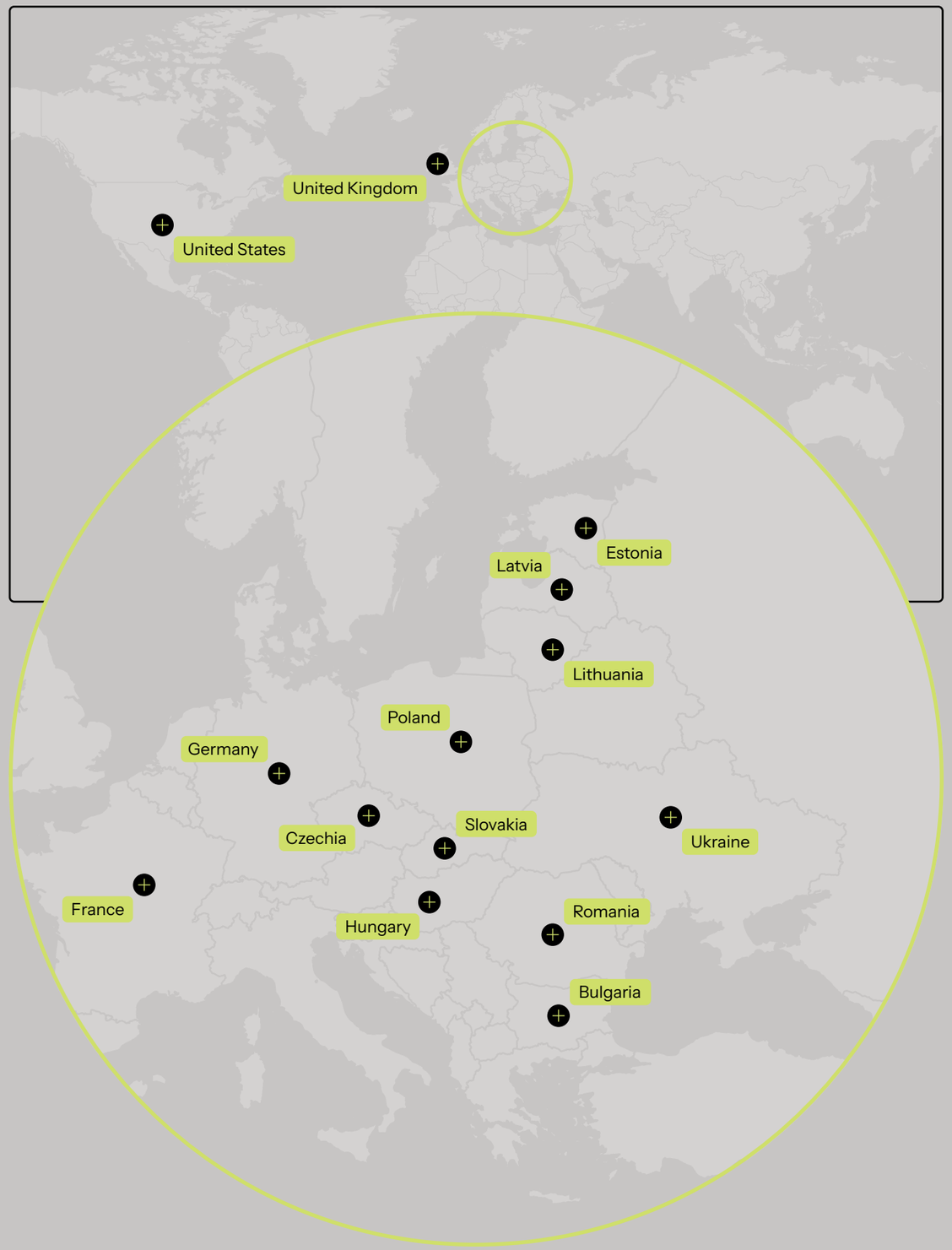
AI is changing how people work, access information and take part in public life, and respondents expect it to affect both jobs and political stability. AI governance should therefore go beyond innovation and the labour market to address its impact on the information space, elections, public services and social cohesion. Governments should involve citizens, trade unions and civil society in setting the rules from early on, alongside credible transition support for the workers most exposed and affected.



7 Build shared awareness of China, Iran and North Korea

Concern about China, Iran and North Korea is far lower in CEE than in Western countries, even though all three help sustain Russia's war against Ukraine. Larger and smaller allies should develop joint projects to close this gap. These could include shared threat assessments, exchanges of intelligence and expertise, and public awareness initiatives showing how these actors enable Russia's war and seek influence in Europe through economic leverage, critical infrastructure and information operations.

→ Countries covered by this report



→ Country Highlights

Bulgaria

Moscow before the West.

Bulgaria is the only surveyed country where Russia tops the list of strategic partners, named by 51%. Just 35% see Russia as a threat, fewer than anywhere else, while more say the same of the US. Asked about what Russia does rather than what it is, concern rises: 56% see Russian sabotage or disinformation as a risk, the lowest of any surveyed country.

Elections under suspicion.

Only 36% of Bulgarian respondents are confident their elections are free and fair, and 40% that results are reported accurately, the lowest of the countries surveyed. Weeks after the country's eighth election in five years, only 57% say democracy is always preferable to any other form of government, also the lowest share, while 32% say a non-democratic government is sometimes preferable, the highest.

In and out.

Bulgaria records the weakest support for EU membership, with only 53% potentially voting to stay. Yet, 59% see economic benefits in membership, and seven in ten want the EU to build its own defence alongside NATO and an EU army. The data hints that respondents in Bulgaria appear to value what the EU delivers more than belonging to it.

Czechia

Looking beyond Russia.

Czech respondents see threats beyond Russia more widely than their Central European peers. 45% regard China as a security threat and 53% say the same of Iran, the highest shares in CEE after Ukraine. This likely reflects years of public attribution of Chinese cyberattacks and influence operations by Czech authorities.

Sceptical all round.

Only 27% of Czech respondents want more US involvement in European security, among the lowest shares surveyed, yet just 45% believe Europe could ensure its own security without strong US support. Scepticism extends to the EU: 76% say EU policies can harm sectors such as agriculture or industry, the most of any EU country surveyed, and fewer than average say membership brings economic benefits, protects democracy or gives their country a bigger say in the world.

Democracy that works.

73% of Czech respondents believe their democracy works, the highest share among the 14 countries surveyed. Trust in the government to keep democracy functioning and confidence that elections are free and fair are also second only to Hungary. Only around a third, however, are optimistic about the future of Czech democracy.

Estonia

A high-trust democracy.

Only 16% of Estonian respondents think an autocratic system without free elections would be good for their country, the lowest share among the countries surveyed. Seven in ten say their democracy works, and 86% call democracy good for Estonia. Confidence in elections lags behind, however, with just over half sure they are free and fair.

Leaning on allies.

Fewer than half of Estonian respondents want higher defence spending, among the lowest shares surveyed, and only 28% think Estonia is prepared for a major crisis. They look to allies instead: 83% would vote to stay in NATO, and 82% want the EU to build its own defence capabilities alongside it. Low appetite for spending more may reflect how much Estonia already spends – among the most in NATO relative to GDP.

Embracing AI, with eyes open.

28% of respondents in Estonia say they are excited about AI because it is improving how they live and work, almost double the average. The optimism extends beyond daily life, with 67% expecting AI to do more good than harm for society. This optimism is not naïve, however: 79% expect AI to replace more jobs than it creates.

→ Country Highlights

France

Deepest democratic gloom.

Only 21% of respondents in France are optimistic about the future of democracy in their country, the lowest share among the countries surveyed. Unlike in most countries, corruption is ranked low among threats to democracy. Respondents point instead to inequality, global crises and falling participation in public life. No other country names the last two as often.

Alert to (not so) distant threats.

France is the only European country surveyed where Iran is seen as a threat as often as Russia, by 7 in 10 respondents. Concern about North Korea and China is also the highest in the EU. This likely reflects France's military footprint in the Middle East, where several of its bases have been targeted since the war with Iran began in 2026.

Ready to serve.

Threat awareness in France is matched by readiness: 77% of respondents support compulsory military service, more than in any other country asked. 53% also feel personally prepared for a major crisis, the highest share in Europe, and more than half would raise defence spending even at the expense of healthcare or social security.

Germany

US seen as a threat.

Germany is the only country surveyed where a majority of respondents, 52%, consider the United States a threat to national security. Just 40% see it as a reliable security partner for Europe, and 53% believe Europe could ensure its own security without strong US support. Still, four in five want US involvement in European security to stay as it is or increase. Respondents in Germany distrust Washington and believe Europe could cope, but seem unwilling to test it.

Receptive to Kremlin narratives.

40% of respondents in Germany believe Ukraine's treatment of Russian speakers justified the invasion, and 39% that the West provoked it, more than anywhere else in Western Europe. This goes hand in hand with softer support for Ukraine: just over half see its fight as important for Germany's security, and almost six in ten would accept Ukraine ceding territory for peace.

Defence in principle, not in person.

63% of respondents in Germany support compulsory military service and 72% would help defend an attacked NATO ally. Yet personal commitment lags far behind, with 47% willing to defend their own country if it were attacked, the joint lowest with Slovakia.

Hungary

A democratic spring.

55% of Hungarian respondents see their democracy as strong rather than under threat, the highest share among the countries surveyed. They also lead in confidence that elections are free and fair, and 71% trust the government to keep democracy functioning, far above the 44% average. The survey took place weeks after the April 2026 election ended Viktor Orbán's 16-year rule.

The Kremlin lens lingers.

55% of Hungarian respondents believe the alleged oppression of Russian speakers justified Russia's invasion of Ukraine, fewer than half see Russia as a security threat, and only a third back continued NATO military support for Ukraine. These views are likely a legacy of past governments' messaging.

Counting on allies.

79% of Hungarian respondents believe the US would honour its Article 5 commitments, more than in any other country surveyed, including the US itself. This mirrors strong backing for NATO: 88% would vote to stay, second only to Poland, and 84% believe membership makes an attack less likely, joint highest with Romania. Yet there is little appetite to change the arrangement or pay more for it: close to half want US involvement to stay as it is, and fewer than half welcome the US call to spend 5% of GDP on defence.

Latvia

No one to count on.

Just 23% of respondents in Latvia believe their country is prepared for a crisis or war, and confidence in outside help is no stronger. 38% think Europe could defend itself without strong US support, the lowest among the countries surveyed, while fewer than half consider the US a reliable security partner. Still, they want Europe to step up: 73% back an EU army and three in four want stronger EU defence alongside NATO.

Exposed information space.

60% of respondents get their news from social media and 20% use Telegram daily, both the highest among the EU countries surveyed. This reliance on platforms comes with low trust in mainstream media, at 31%, and suspicion of efforts to rein the platforms in, with two-thirds seeing social media regulation as censorship. Yet when Washington challenges EU online rules, respondents close ranks: 71% are opposed.

Democratic disillusionment.

Only 23% in Latvia are optimistic about the country's democratic future, while 30% trust the government to safeguard it. 44% believe elections are free and fair, and nearly one in three say a non-democratic government is sometimes preferable, one of the highest shares among the countries surveyed.

Lithuania

Betting on Europe.

82% of Lithuanian respondents would vote to stay in the EU, the highest of any member state surveyed. Europe is also seen here as a security project: 78% want an EU army, and Lithuania is the only Baltic state where a majority believe Europe could ensure its security without strong US support. When Washington steps back, 87% want Europe to step up.

Firm backer of Ukraine.

Kremlin narratives about the war find less traction in Lithuania than in any other country surveyed except Ukraine, accepted by only around a quarter. That clear view of the war comes with steady support: three quarters of respondents say Ukraine's fight matters for Lithuania's own security and back continued military aid, while 74% want Europe to keep helping Ukraine whatever the US does. Looking ahead, half want Ukraine in both the EU and NATO, joint highest with the UK.

More US, not more spending.

63% of Lithuanian respondents want the US more involved in European security, the highest of any EU or NATO member surveyed. Yet only 54% back higher defence spending, even though just 36% think Lithuania is prepared for a major crisis. Doubts about the economic case may play a part, as only half believe higher defence spending would support growth.

Poland

Ready to pay, not prepared.

79% of Polish respondents back higher defence spending, and 59% would accept it even at the expense of social security or healthcare, the highest share in the EU. 72% also expect defence spending to boost economic growth, yet fewer than half feel personally prepared for a major crisis or believe Poland is prepared.

Ukraine support softening.

While 72% believe Ukraine's fight is important for Poland's security, only 59% support continued military assistance, the widest gap among the CEE countries surveyed. 36% favour Ukraine joining both the EU and NATO, fewer than in any of the Baltic states.

Atlanticist to the core.

68% of Polish respondents view the US demand to raise defence spending to 5% of GDP positively, more than US respondents themselves. 82% also welcome the US military presence in Europe, and only 23% see the US as a security threat, even as views of Washington sour elsewhere in Europe. Poland hosts one of the largest US military presences in the region and is among NATO's highest defence spenders relative to GDP.

→ Country Highlights

Romania

Security on every front.

Respondents in Romania back every security option on the table. 82% want an EU army, the most among the member states surveyed, while 55% also want more US involvement in European security, and 84% say NATO membership protects Romania from attack.

Washington's most loyal ally.

65% of respondents in Romania name the US as a key strategic partner, the highest share in the region, and 74% consider it a reliable security partner for Europe. Warmth extends to US politics: 61% view Washington's support for conservative social actors in Europe positively, more than in any other country surveyed, the US included.

Democrats wary of the ballot box.

78% in Romania say democracy is always preferable to any other form of government, yet just 30% consider their democracy strong rather than under threat, the lowest share in the EU. Only 40% believe elections are free, fair and reflect the will of the people, after the annulment of the 2024 presidential election over a social media manipulation campaign.

Slovakia

Anchored, but drifting.

66% of respondents in Slovakia would vote to stay in the EU, and slightly more would stay in NATO. Asked to name their country's most important strategic partners, however, more choose Russia than the United States, at 38% against 23%, while only half see Russia as a security threat.

Open to the Kremlin's influence.

44% of respondents in Slovakia believe the West provoked the war in Ukraine. They are also the most willing among the countries surveyed to see Ukraine give up territory for peace, at 69%, and few would cut ties with Moscow at any cost: 63% would allow Russian energy purchases if prices rose.

Least prepared, yet open to service.

Only 19% of respondents in Slovakia believe their country is prepared for a major crisis, the lowest among the countries surveyed. Low confidence in the state's preparedness does not translate into rejecting military service: 60% support compulsory military service, even though only 47% would defend their country themselves if it were attacked.

Ukraine

AI as an instrument of resilience.

68% of Ukrainian respondents believe AI will do more good than harm, and only 52% think it will make the world less stable, the most positive outlook among the countries surveyed. It may be linked to the fact that AI has become embedded in Ukraine's defence, where it is used to detect targets, guide drones and counter influence operations.

Aiming high, ready to compromise.

68% of Ukrainian respondents want their country to join the EU, NATO or both, with membership of both the most popular option, at 46%. NATO is seen as the key to security: 65% would vote to join, and 74% believe membership would deter an attack. Yet a third would already settle for lasting guarantees from the US and allies without membership.

Trusted army, doubted governance.

87% of Ukrainian respondents trust their armed forces and 80% want to spend more on defence. The confidence extends to the country's resilience: four years into the full-scale invasion, 55% consider Ukraine prepared for a major crisis, the most in Europe. It stops short of the government, however: only 39% trust it, and 70% name corruption among the biggest threats to democracy.

United Kingdom

Ukraine's staunchest backer.

78% of UK respondents want Ukraine to join the EU, NATO or both, a higher share than in Ukraine itself. The same share backs continued NATO military support, and agrees Europe should keep supporting Ukraine regardless of US involvement. This mirrors the UK's role as one of Ukraine's most consistent backers, from the first Western commitment of main battle tanks to training Ukrainian troops on British soil.

Washington's European ally.

The US remains the UK's top strategic partner, named by 57% of UK respondents. UK respondents are also the most approving of US military interventions in Europe, and their concern about China and Iran mirrors US threat perceptions more closely than anywhere else in Europe.

But ready to stand without Washington.

At the same time, 59% of UK respondents are confident that Europe could ensure its own security without strong US support, the most of any country surveyed. That confidence comes with a readiness to invest, as 77% want higher defence spending.

A decade after Brexit, nearly two-thirds would vote to rejoin the EU.

United States

Support for the order, on thin margins.

54% of US respondents want to maintain the post-war order of alliances and multilateral cooperation, while the rest would rather focus on national interests. Europe still matters in that picture, with 79% calling the US role in European security important. Yet only 38% want more US involvement on the continent, and 56% believe Europe could ensure its own security without strong US support.

Committed to NATO, tired of the bill.

75% of US respondents say their country should help defend an attacked NATO ally, and 69% say NATO makes the US stronger. That commitment, however, comes with a grievance about burden-sharing: 65% believe the US pays too much for Europe's defence, and half say European countries have been taking advantage, with 60% backing the call for allies to spend 5% of GDP on defence.

Backing Ukraine, split on peace terms.

81% of US respondents hold Russia primarily responsible for the war, and 71% want NATO countries, the US included, to keep arming Ukraine. Views split on the terms of peace, however: 51% would accept Ukraine giving up territory, even as 79% say any settlement must offer credible long-term security.

Defence



77%

of respondents in NATO member countries would vote to stay in the Alliance, and 78% of EU respondents want the EU to develop its own defence capabilities alongside it.

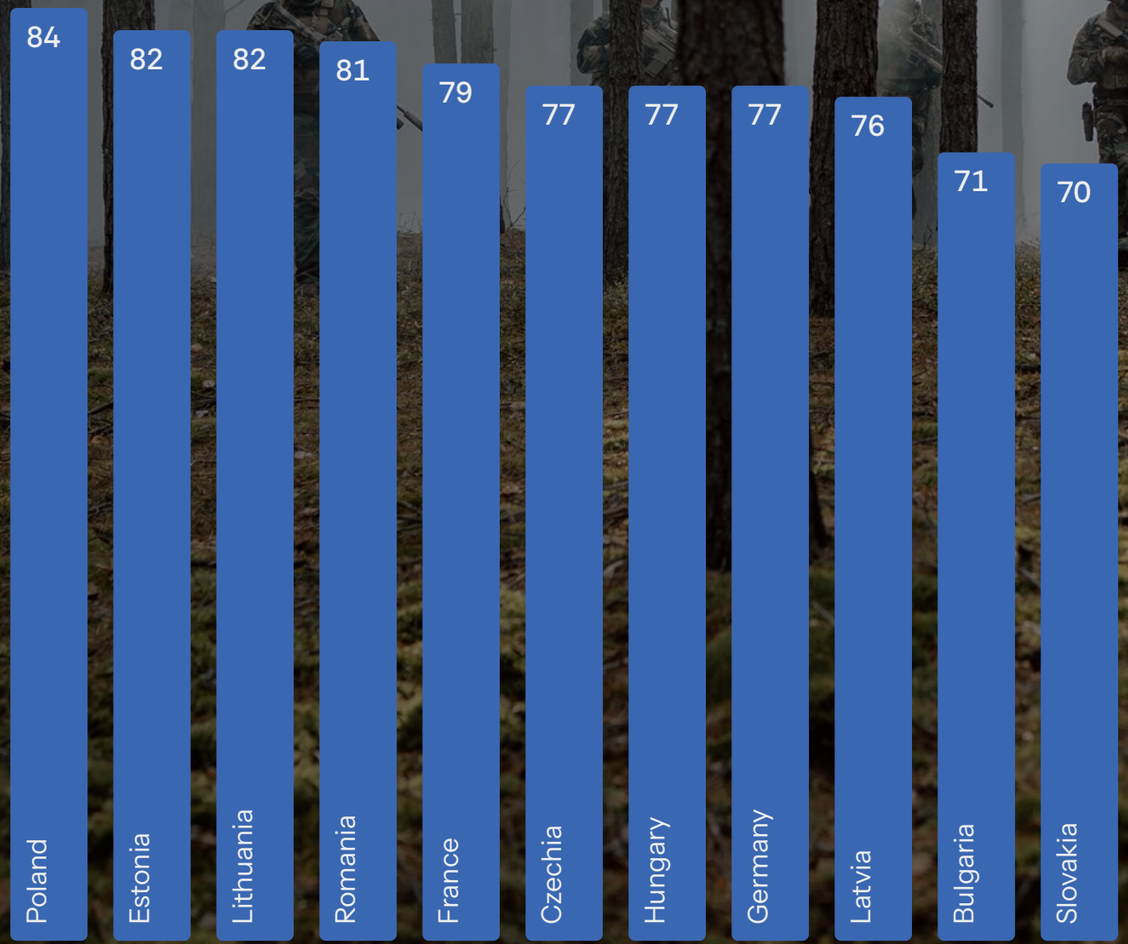
Europe has entered one of the most consequential decades for its defence readiness, and public opinion broadly aligns with the direction of government policy. 78% of respondents across the EU want the bloc to develop capabilities of its own alongside NATO, and - in every country but Hungary – majorities support the return of compulsory military service. In most countries, trust in the armed forces remains high and stable, as does support for increased defence spending and the individual willingness to fight for one's country. The political will to act on the rearmament of Europe, this data suggests, is therefore unlikely to founder on public resistance, though that support softens once social and economic trade-offs are taken into account. What is less settled is the relationship with Washington. While NATO itself commands broad legitimacy — 77% of respondents in member countries would vote to remain in the Alliance — differences arise over expectations of the US and its role. Support for higher defence spending is shared by 61% of respondents in European NATO members, but only 50% see the US demand for higher spending positively — a demand that 65% of US respondents feel is justified, agreeing their country pays an unfair share of the burden for Europe's defence. Respondents outside the US want continued US involvement, what has become uncomfortable, as the Transatlantic Relations chapter shows, are the terms.

More autonomy wanted

Few areas of European policy have developed as far, as fast, as defence. Amid the transatlantic rupture and the drive to strengthen Europe's deterrence against potential Russian military escalation[2], defence spending is rising to levels that would have been unthinkable a decade ago. EU countries are projected to spend EUR 454 billion by the end of 2026 - amounting to 2.4% of the bloc's GDP.[3]

With defence at the centre of the political agenda, public opinion is broadly supportive of a stronger Europe. 78% of respondents across the EU countries polled believe the EU should develop its own capabilities alongside NATO, and 71%, on average, would welcome an EU army. Support for the latter tends to be stronger along the Eastern Flank, as well as in France, where President Emmanuel Macron has consistently and publicly championed greater European defence autonomy.[4]

% Those who agree that the EU should develop its own defence capabilities alongside NATO.



While proposals for a standing European force appear unrealistic for now, given the absence of a command structure and clear lines of authority[5], the broad support for a European "army" creates an opportunity to deepen cooperation under Permanent Structured Cooperation (PESCO) or expand troop deployments on the Eastern Flank under NATO command.



64%

of respondents in countries without compulsory military service would welcome its return.

% Those who agree that the EU should have its own army.

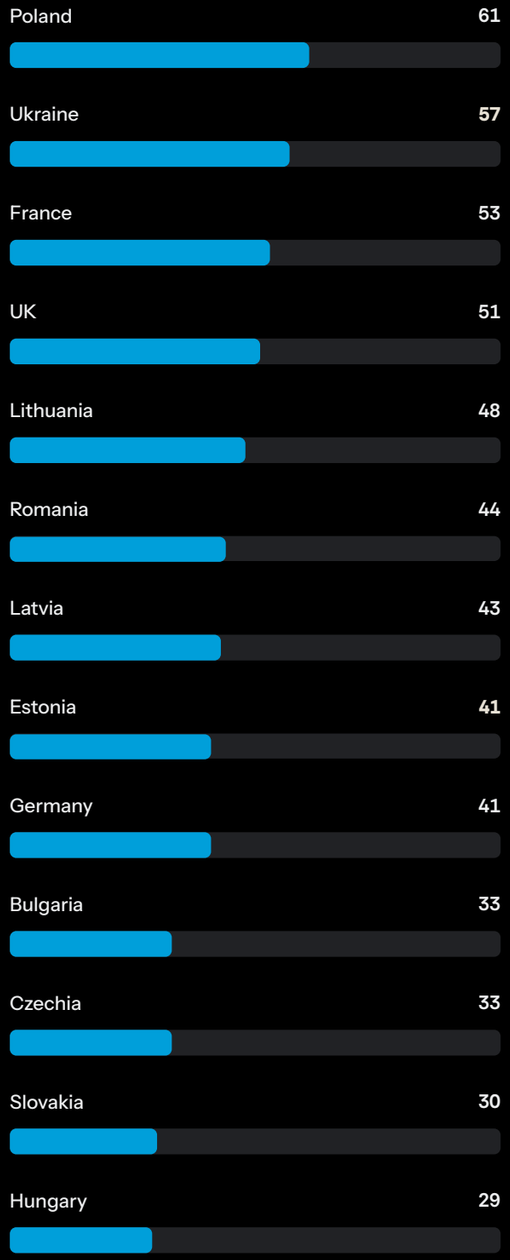


Nuclear doubt

Nuclear weapons remain a sensitive issue, and in most surveyed countries they are not seen as a deterrence capability Europe should invest in. Opinion is divided in Lithuania, the UK and France – with the latter two being the only independent nuclear-armed states in Europe. Clearer support emerges in Ukraine, which surrendered its nuclear arsenal in 1994 under the Budapest Memorandum in exchange for security guarantees that ultimately failed, and in Poland, where a cross-party consensus has formed around an ally-provided nuclear umbrella or developing an independent capability.[6]



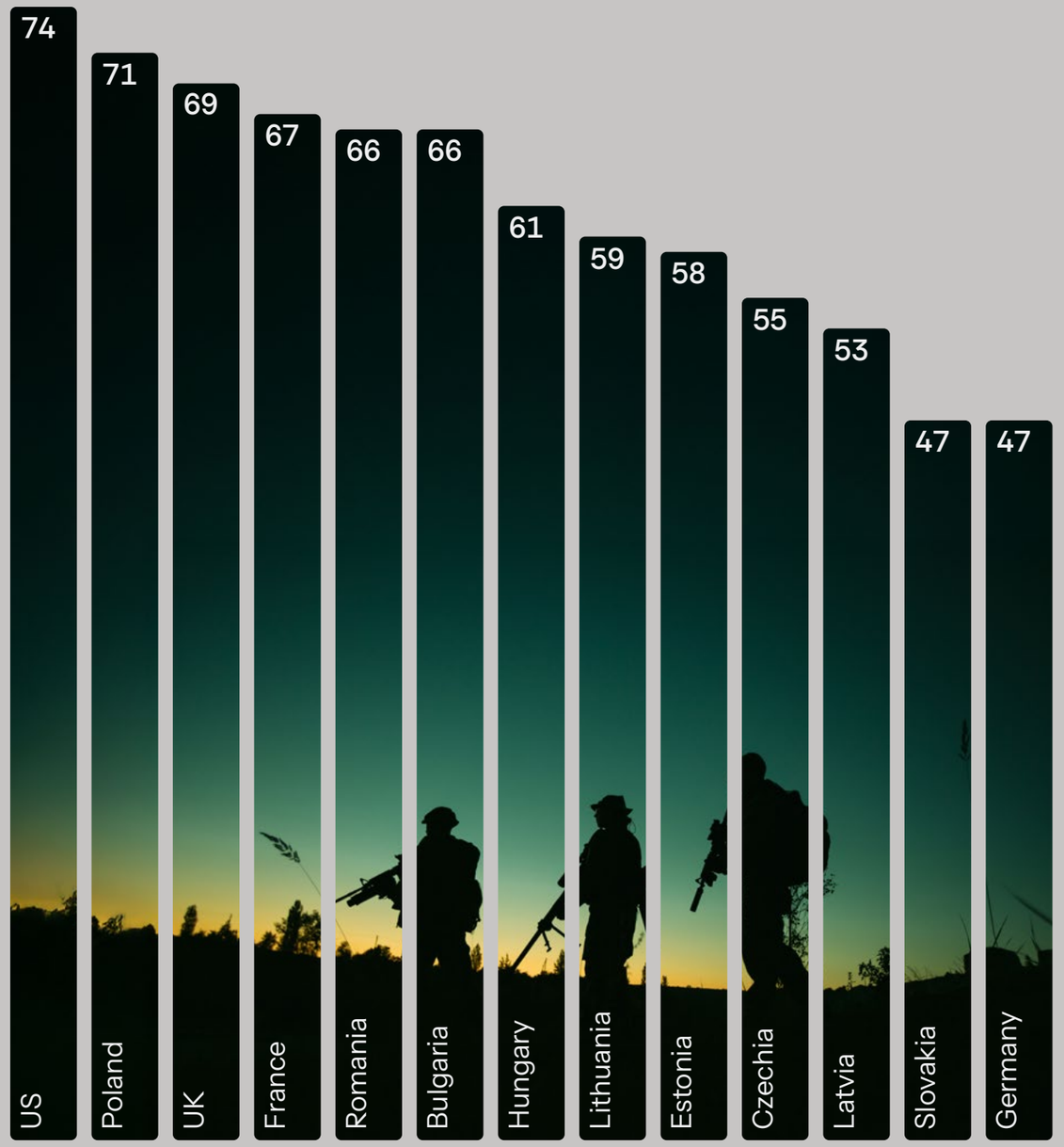
% Those who believe more EU countries should develop nuclear weapons to strengthen Europe's security.



Ready to fight?

Heightened security threats coincide with a notable willingness to contribute to national security and resilience. Majorities in every surveyed country except Slovakia and Germany say they would be willing to fight for their country if attacked. This inclination across most of the CEE region, Slovakia aside, was also recorded in GLOBSEC Trends 2025.[7]

% Those who would be willing to defend their country in the event of an attack.



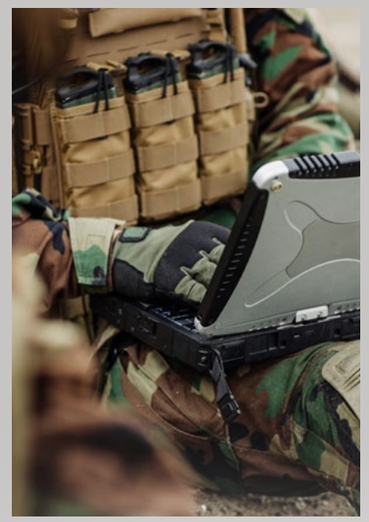
Bring conscription back

Since the 2014 invasion of Ukraine, several European countries have reintroduced compulsory or voluntary military service[8], while others have opened debates on models suited to strengthening their civilian and military resilience.[9] The findings show that political reluctance to reintroduce conscription cannot be attributed to insufficient public support: a majority in every polled country except Hungary backs the return of compulsory military service.

In Germany, Slovakia, Czechia and France, considerably more respondents support conscription than say they would be willing to fight for their country. Reintroducing military service in these countries might build the skills and confidence that could, in turn, strengthen willingness to defend one's homeland.

64%

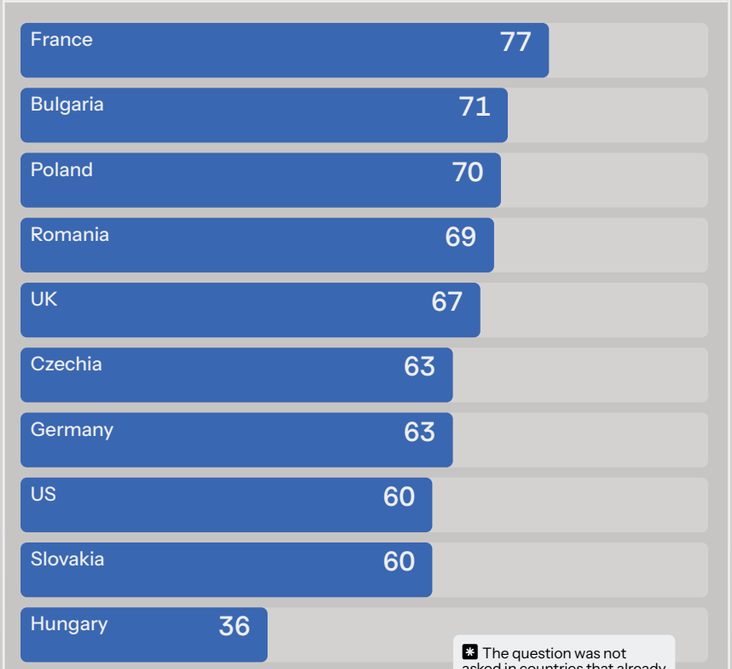
of respondents in countries without compulsory military service would welcome its return.



Hungary and, to a lesser degree, the US represent the opposite case: in both, more respondents say they would defend their country than favour compulsory service. This suggests that stated willingness to fight does not necessarily depend on formal conscription structures — in place in Latvia, Lithuania and Estonia – and may rest on other sources of public motivation.

% Some European countries have recently reintroduced or expanded compulsory military service. Do you think your country should do the same?

Those who support their country doing the same. *



* The question was not asked in countries that already have compulsory military service, or in Ukraine.

Willing but feeling unprepared

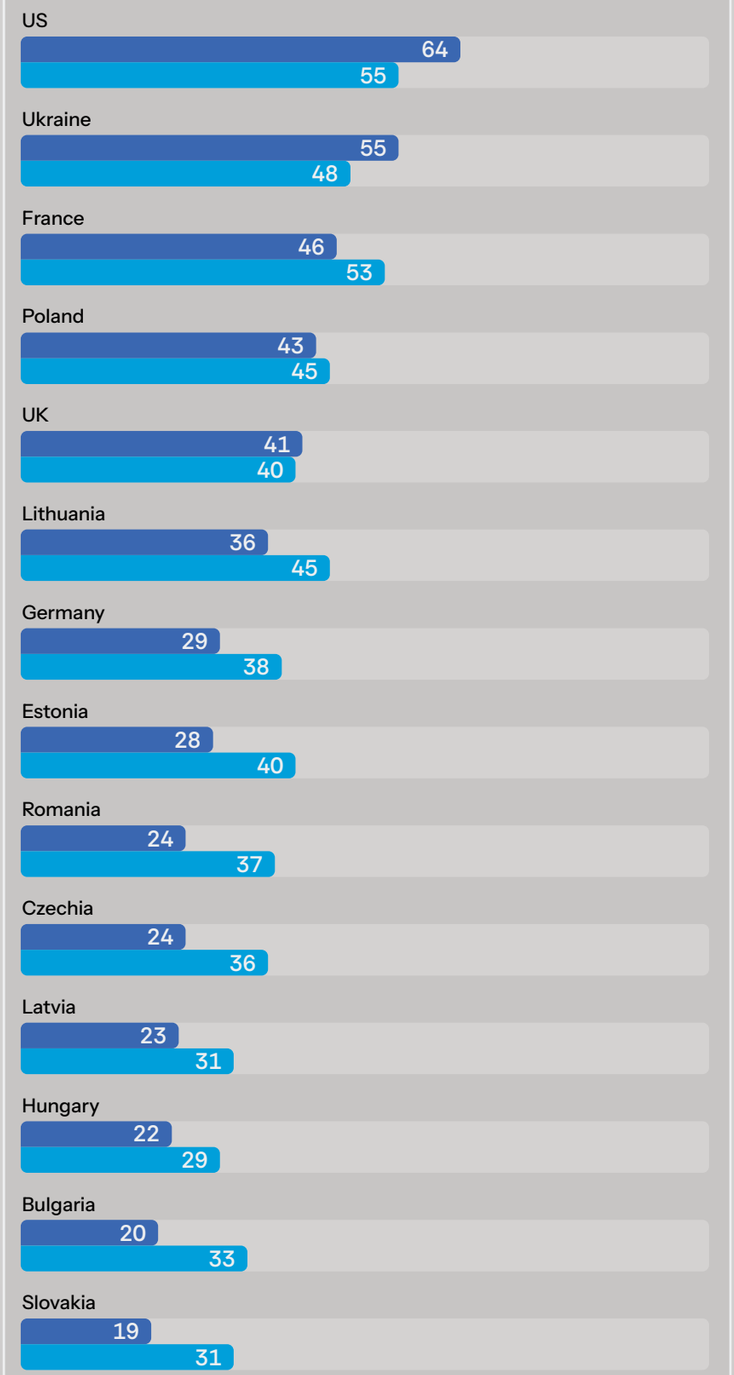
Outside the US and Ukraine, majorities of respondents do not believe that their state is well prepared for a crisis or war. In the US, this perception may be linked to the country's long-standing role as security guarantor and military power, whether within NATO or through its position as the world's largest defence spender in nominal terms[10].

While Ukraine has invested heavily in its own defence and preparedness since 2014, and particularly since 2022, this appears to show more clearly in confidence in national preparedness (55%, second only to the US) than in personal readiness, where Ukrainians are split roughly in half (48%), though even this is among the highest levels recorded across the surveyed countries.

At the same time, everywhere except the US, Ukraine and the UK, respondents feel personally better prepared than they believe their country to be. Low confidence in national preparedness may stem from — or contribute to — weaker trust in government[11], a combination that can complicate crisis response. However, willingness to fight for one's country shown on the previous pages persists even where respondents doubt both their own readiness and that of their state.

% Those who agree with the following statements:

- I feel that my country is prepared for a major security crisis or war
- I feel personally prepared for a major crisis or security emergency



Let's spend, but...

Meeting the Hague commitment to dedicate at least 3.5% of GDP annually to core defence by 2035[12] requires a major ramp-up in most countries, with Poland and the three Baltic states leading NATO spending tables[13]. Backing for increased defence spending remains strong in most surveyed countries, but opinion divides in Slovakia, Latvia and Estonia, where slightly less than half of respondents support it.

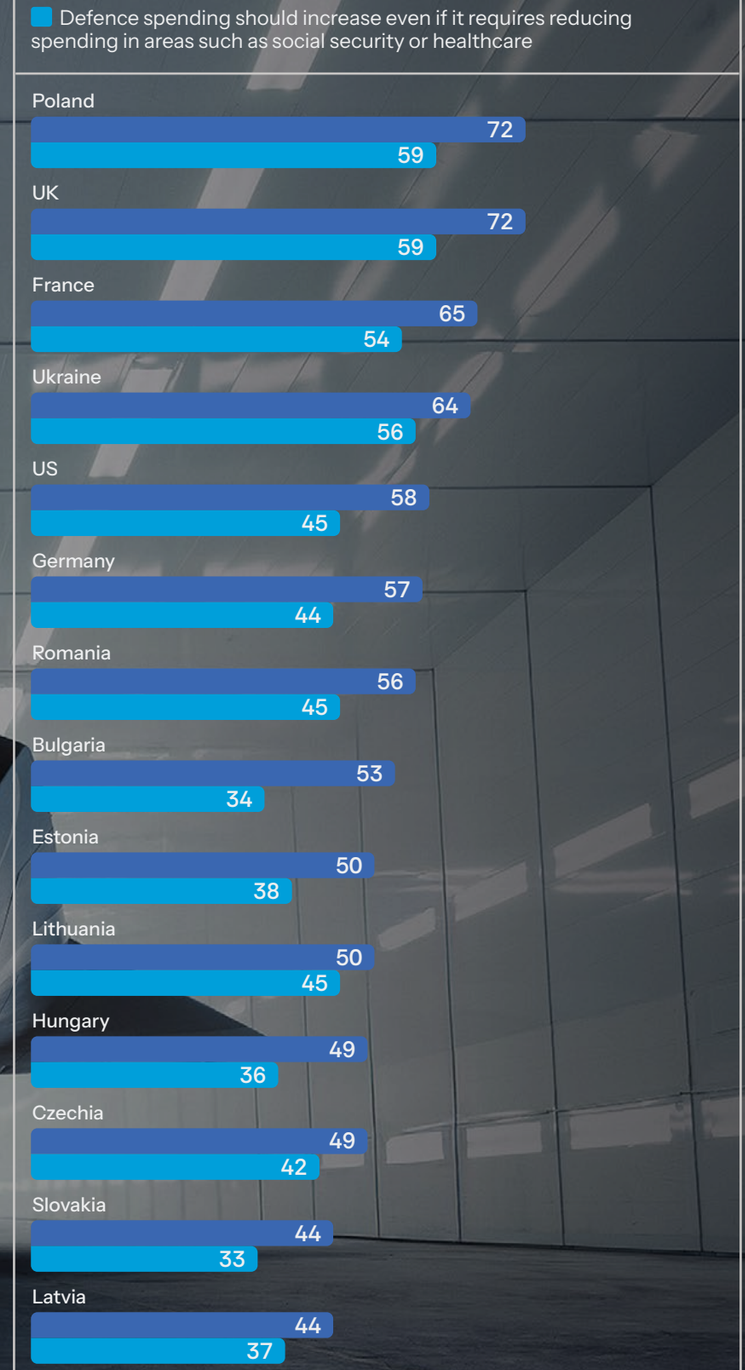
One possible factor is scepticism that defence spending contributes to GDP growth. Across most of CEE, Poland and Ukraine excepted, the findings reveal a window of opportunity to raise awareness of what investment in the defence industry can generate for local economies, job creation included.[14]

With the exception of Ukraine, at war, respondents from countries with some of the lowest GDP per capita in the EU – Bulgaria, Latvia, Slovakia or Hungary[15] - also tend to be the least supportive of increasing defence spending at the expense of social benefits.

→ % Those who agree that their country should increase its current defence spending.



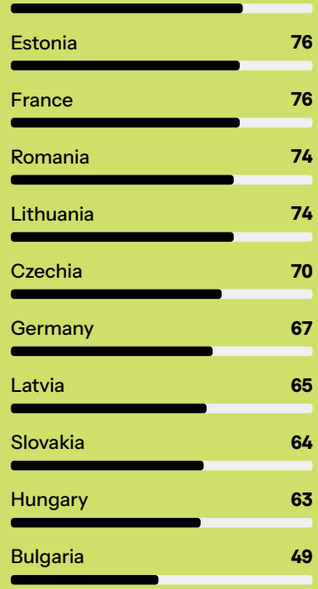
→ % Those who agree with the following statements:



Armed forces trusted

Against the backdrop of intensified debate on the need for Europe to boost its defence capabilities and deterrence, trust in the armed forces in most countries remains strong and stable, consistent with long-term measurements in past GLOBSEC Trends editions.[16]

→ % Those who trust the armed forces in their country.



The Transatlantic Defence Alliance



NATO: a backbone

65%

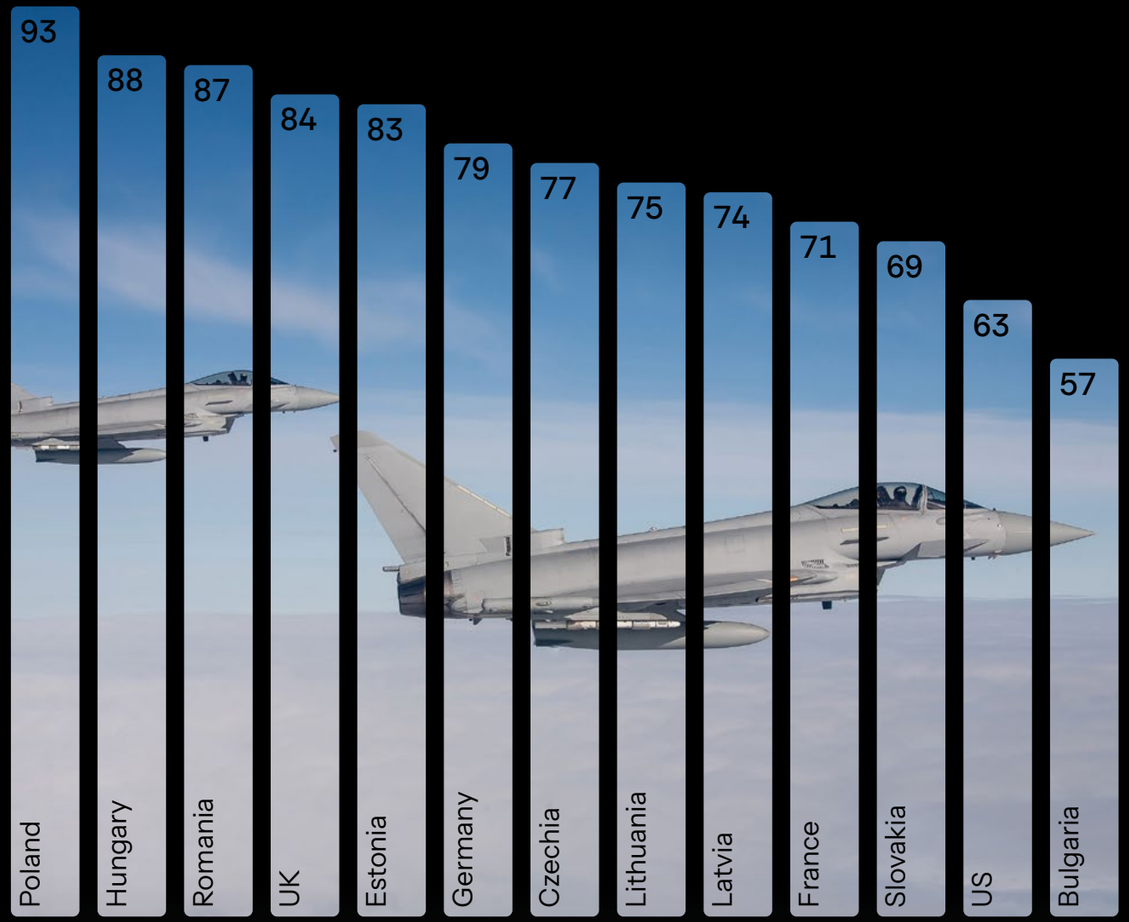
in Ukraine would vote to join NATO in a referendum, and 74% see it as a deterrent.

Despite tensions within the transatlantic alliance, NATO continues to be viewed as crucial: 77% of respondents in polled NATO member countries would vote to remain in the event of a referendum, and 72% see the Alliance as a tool of deterrence. While differences between countries remain stark, results across CEE broadly reflect past GLOBSEC Trends polls,[17] with Poland, Hungary and Romania at the top and Bulgaria and Slovakia at the bottom.

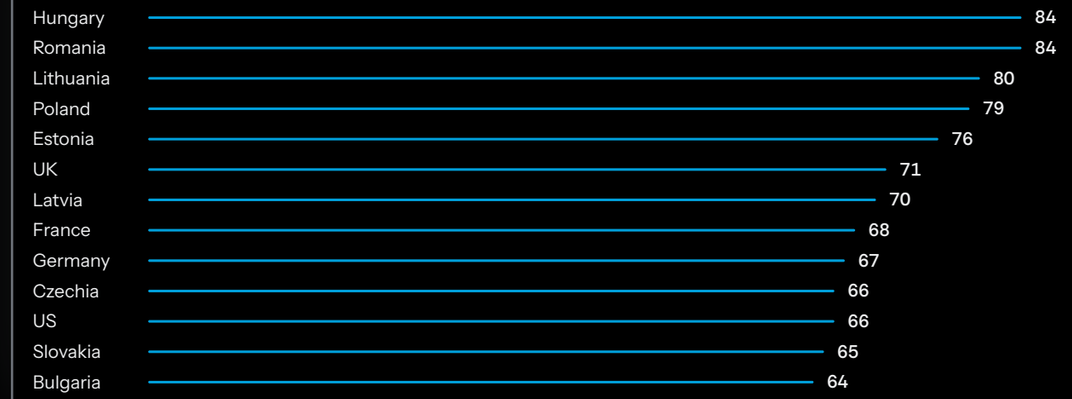
The results from the US warrant particular attention, given the country's central role in Europe's security. Lower support for NATO in the US has also been recorded by other surveys this year. A Pew Research Center survey from March 2026 found that 59% of respondents in the US say the country benefits from NATO membership, though the figure falls to 38% among Republican respondents,[18] pointing to a division running primarily along party lines.

Nonetheless, in a separate question put to the US public in this survey, 69% of respondents said that the US is stronger because of its NATO membership. As the data in the following pages also show, and in contrast to most European countries, US respondents appear to place greater confidence in NATO's core principles of collective security and solidarity than in the institution itself.

→ % Those who would stay in NATO if a referendum were held today.



→ % Those who agree their country's membership in NATO makes it more likely that a foreign nation will NOT attack them.



In Article 5 we trust

The principle of collective defence enjoys broad public backing: majorities in all polled countries agree that their country should help defend a NATO ally under attack. Confidence that the US would honour that commitment is lower: a notable finding, given that Washington remains the key security guarantor within the Alliance.

In the US, backing for Article 5 stands apart from the support for NATO membership, which sits at 63%. Stronger backing for the collective defence principle than for the institution itself may reflect an awareness among respondents that the US plays a central role in European security, as discussed in the next section. The finding is consistent with other polling, in which majorities (81%) express favourable attitudes towards defending allies, including when asked specifically about Poland or the Baltic states[19].

74%

of respondents in NATO member countries say their country should honour Article 5. 68% in NATO believe the US would honour it.

→ % Those who agree with the following statements:

If a NATO country is attacked, my country should help defend it together with other NATO members.

The United States would honour its Article 5 obligations in case a NATO member country is attacked.



Not happy with the push

The limited appreciation of the need for a more balanced approach within the Alliance, hinted at in the previous section, becomes more pronounced on the question of investment. Majorities in Hungary, Czechia, Bulgaria and Slovakia — countries whose respondents show generally lower enthusiasm for increased defence spending, greater scepticism towards an EU army, and more reluctance on expanding Europe's nuclear arsenal — do not view the US call for Europe to spend more on defence positively. Part of this scepticism, particularly in Bulgaria and Slovakia, may also stem from a comparatively negative perception of the US overall, recorded in past editions of GLOBSEC Trends.[20]

The ranking, however, does not follow the logic of threat proximity alone. It tracks more closely whether a country's security identity is currently built around close bilateral cooperation with the US. Poland, Lithuania, Estonia and the UK, whose governments have aligned their defence postures closely with Washington[21], view the demand more favourably. France, where an independent nuclear deterrent and a long doctrinal tradition of strategic sovereignty have shaped how defence decisions are framed[22], sits considerably lower. So does Germany, where public support for defence investment has risen steadily since 2022 but confidence in the US as an ally has fallen[23].

The pattern suggests the question captured approval of a demand and its source at least as much as support for spending itself. The distinction indicates that in parts of the Alliance, the case for higher spending might be received more favourably if it were made in European terms.

→ % Those who view the US demand that NATO members raise defence spending to 5% of GDP positively.



Poland	68
US	60
Lithuania	60
Estonia	59
UK	57
Romania	53
France	49
Germany	49
Latvia	47
Hungary	45
Czechia	39
Bulgaria	36
Slovakia	33

68%

in Poland welcome the US call for 5% of GDP on defence, more than in the US itself.

Soldiers, don't go

Attitudes similar to those in previous sections apply to the US military presence in Europe, estimated at between 80,000 and 100,000[24] troops, with Germany hosting the largest share of active-duty personnel, at around 35,000.[25]

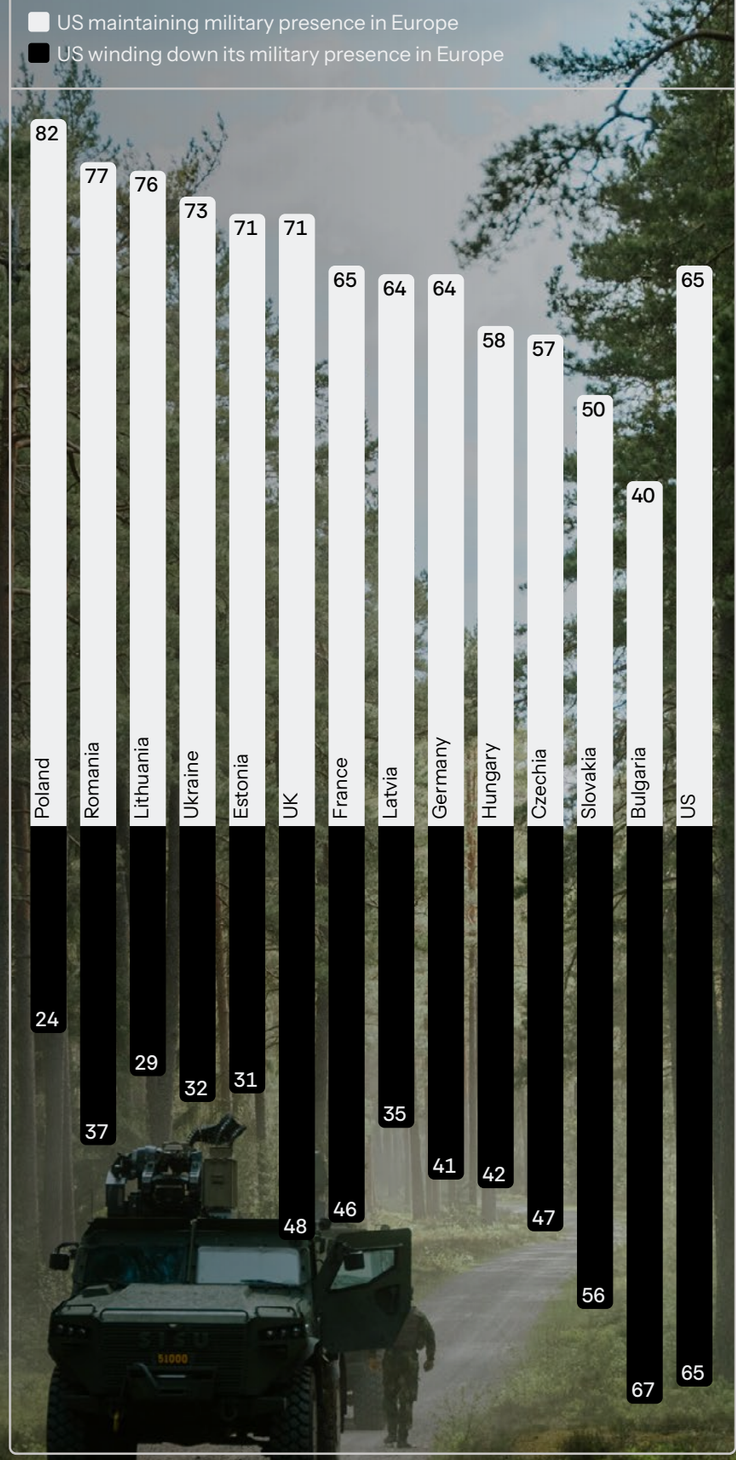
That presence is viewed positively by 65% of respondents overall. Against a backdrop of successive US announcements signalling a reduction of forces in Europe[26], majorities across the continent view a winding down of the presence negatively — the exceptions being respondents in Bulgaria and Slovakia, the most US-sceptical in the sample, and the US itself.

Among US respondents, the proportion viewing the maintenance of the presence positively and the proportion viewing the drawdown positively are identical, at 65%. This tolerance for withdrawal may be linked to a perception of unfairness: in a separate question, 65% of US respondents agreed that their country pays an unfair share of the burden for Europe's defence.

65%

of US respondents believe the US pays an unfair share of the burden for Europe's defence.

→ % Those who view the following positively:



US is part of Europe's security

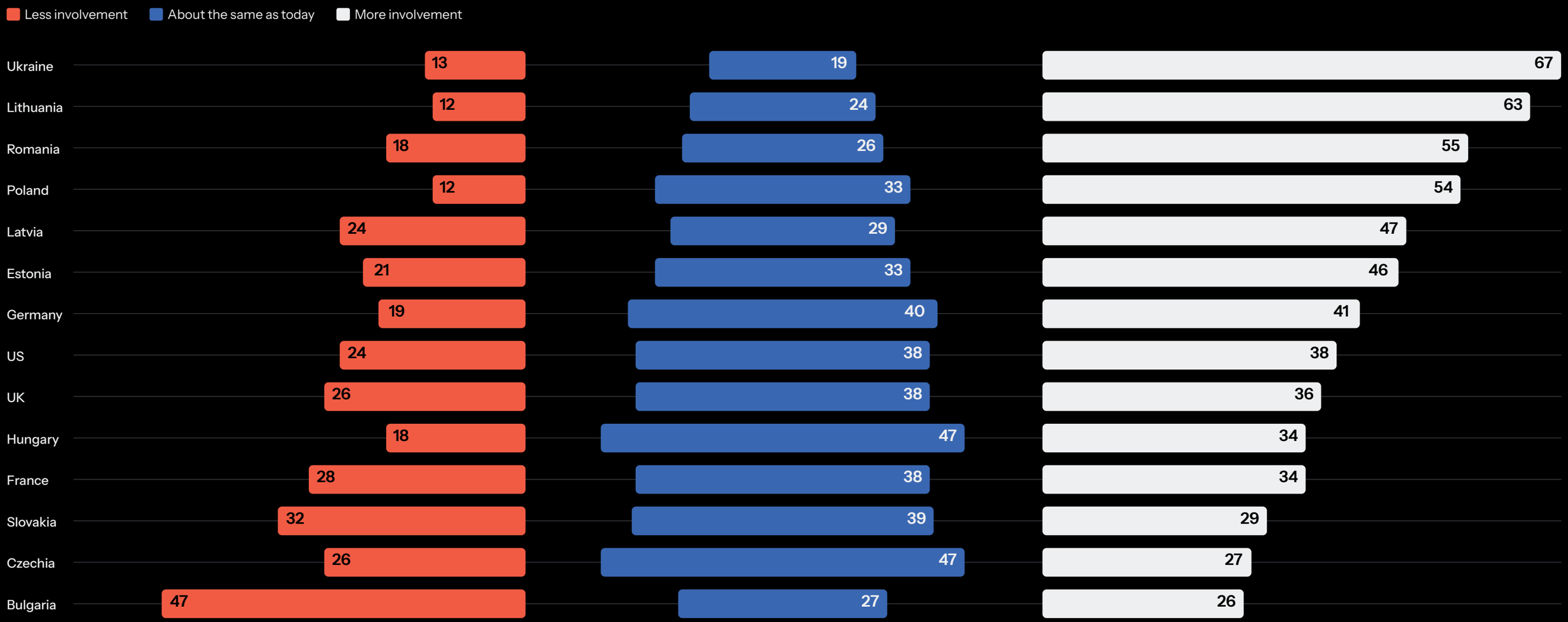
Despite the divisions documented in the Transatlantic Relations chapter of this report, respondents across the transatlantic space converge on the view that the US matters for European security. Nowhere does a majority favour a reduced US role, and in Poland, the Baltic states and Ukraine at least relative majorities want more of it. Read against the scepticism recorded earlier towards US demands for higher spending, the pattern points to a specific distinction: respondents in Europe are not, for the most part, questioning the importance of the US presence, but a substantial share question the terms on which it is offered.



% Those who believe the US role in maintaining security in Europe is important.



% To what extent do you think the US should be involved in European security in the future?



The European Union



71%

of respondents from EU countries support their country's membership in the European Union.

The EU remains broadly valued across the surveyed countries, though support coexists with criticism. 7 in 10 respondents in the surveyed EU member states would vote to remain in the Union, and majorities associate membership with economic benefits, democratic stability and greater influence in world affairs. The highest and the lowest support are both recorded in CEE, from 82% in Lithuania down to 53% in Bulgaria. The Union's appeal is visible from outside it as well, with 64% of respondents in the United Kingdom saying they would vote to rejoin a decade after the referendum and 59% now describing departure as the wrong decision. At the same time, 67% agree that EU policies can negatively affect certain sectors of the economy, and in several countries close to half agree that membership may threaten traditional values and sovereignty.

No appetite for exit

Support for EU membership remains strong across much of CEE, with respondents in Lithuania, Hungary, Estonia, Romania and Poland expressing higher levels of support than those in Germany and France. Several factors may help explain the difference. Economic returns may be more visible where accession brought tangible gains within a single generation. The EU may also be read through a security lens, rather than an economic one alone. And for smaller states, membership may be seen to amplify national influence rather than dilute it. Dissatisfaction with Brussels may run high in domestic politics, but does not necessarily translate into a desire to leave.

The EU also holds appeal beyond its member states: nearly two thirds of respondents in the UK say they would vote to rejoin, a decade after the country voted to leave. Several factors may be relevant, including economic strain[27], domestic political instability (six prime ministers in ten years), and a security environment reshaped by the war in Ukraine and growing doubts about Washington[28].

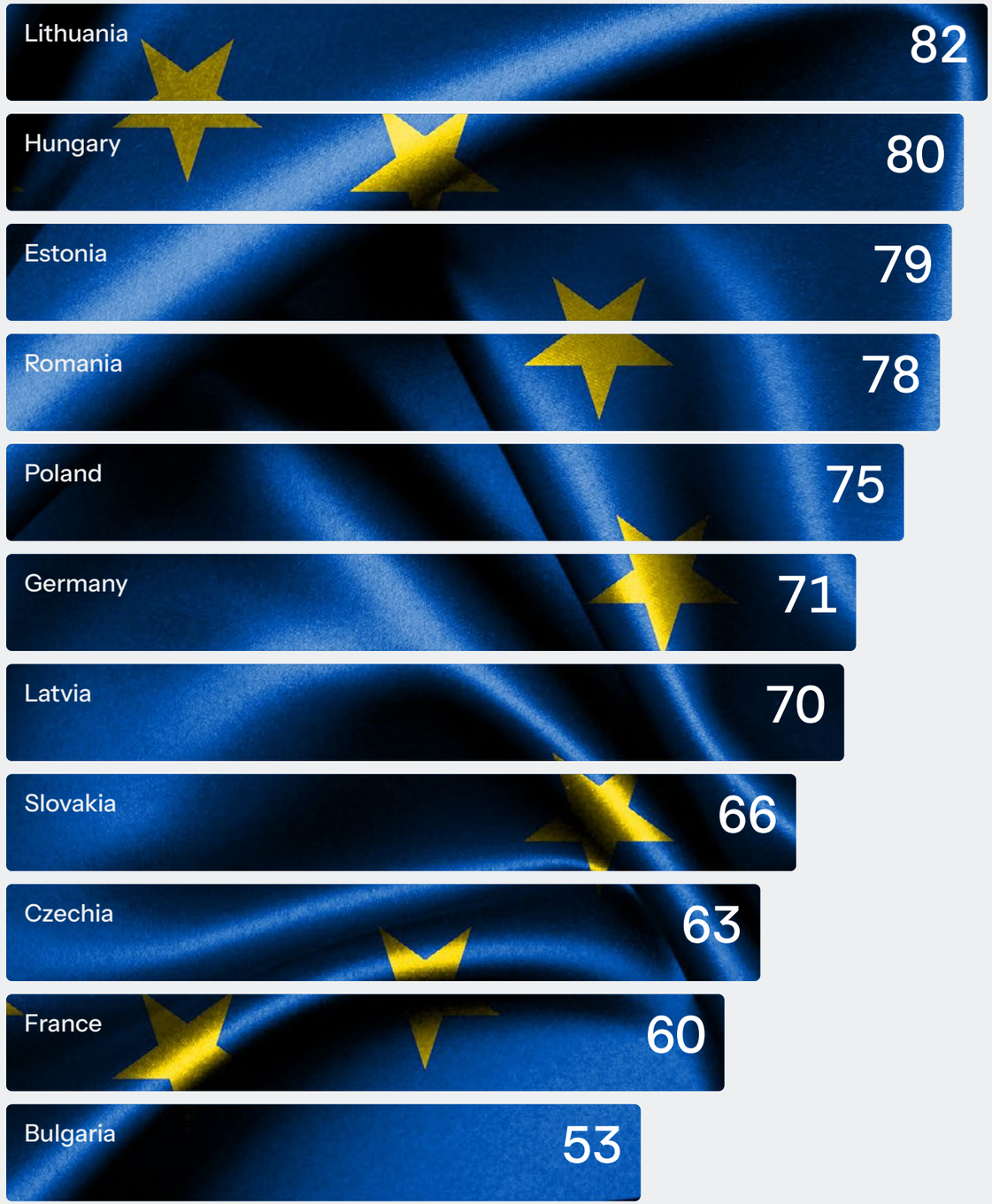
Back to the EU?

% If possible, I would vote to rejoin the European Union.





% If a referendum were held today on your country's membership in the European Union, how would you vote? Those voting to stay:



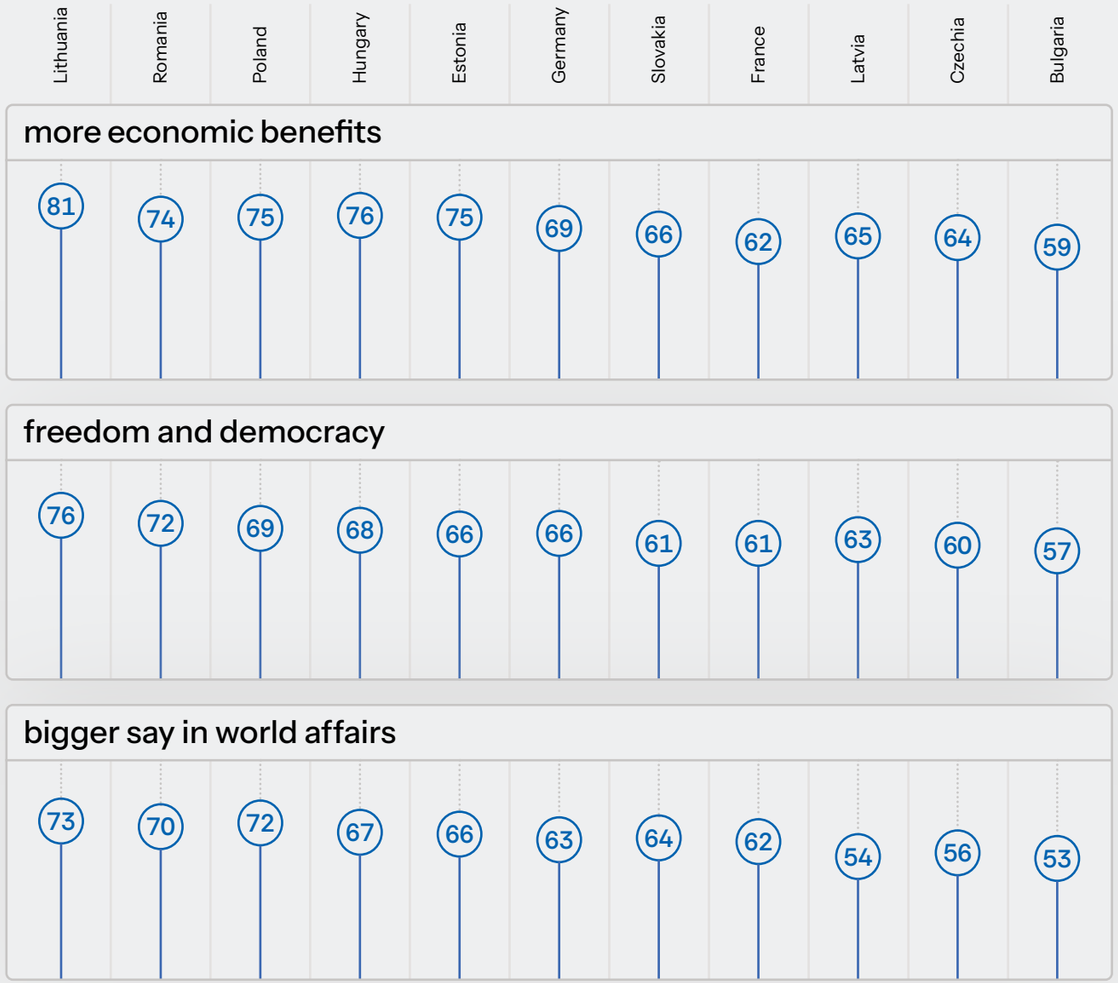
Membership benefits

Majorities in every country value all three tested benefits of EU membership. Within that consensus, a consistent order emerges: agreement is highest on economic benefit in almost every country and lowers on the statement that membership helps the country stay free and democratic. This suggests the EU is still understood primarily as an economic proposition, with its political and security dimensions trailing behind — even in CEE, where the Union's role as a Western security anchor might be expected to weigh more heavily.

70%

of respondents in the EU believe that the Union membership brings economic benefits to their country.

% Thanks to the membership in the EU, my country has:



Economics over sovereignty

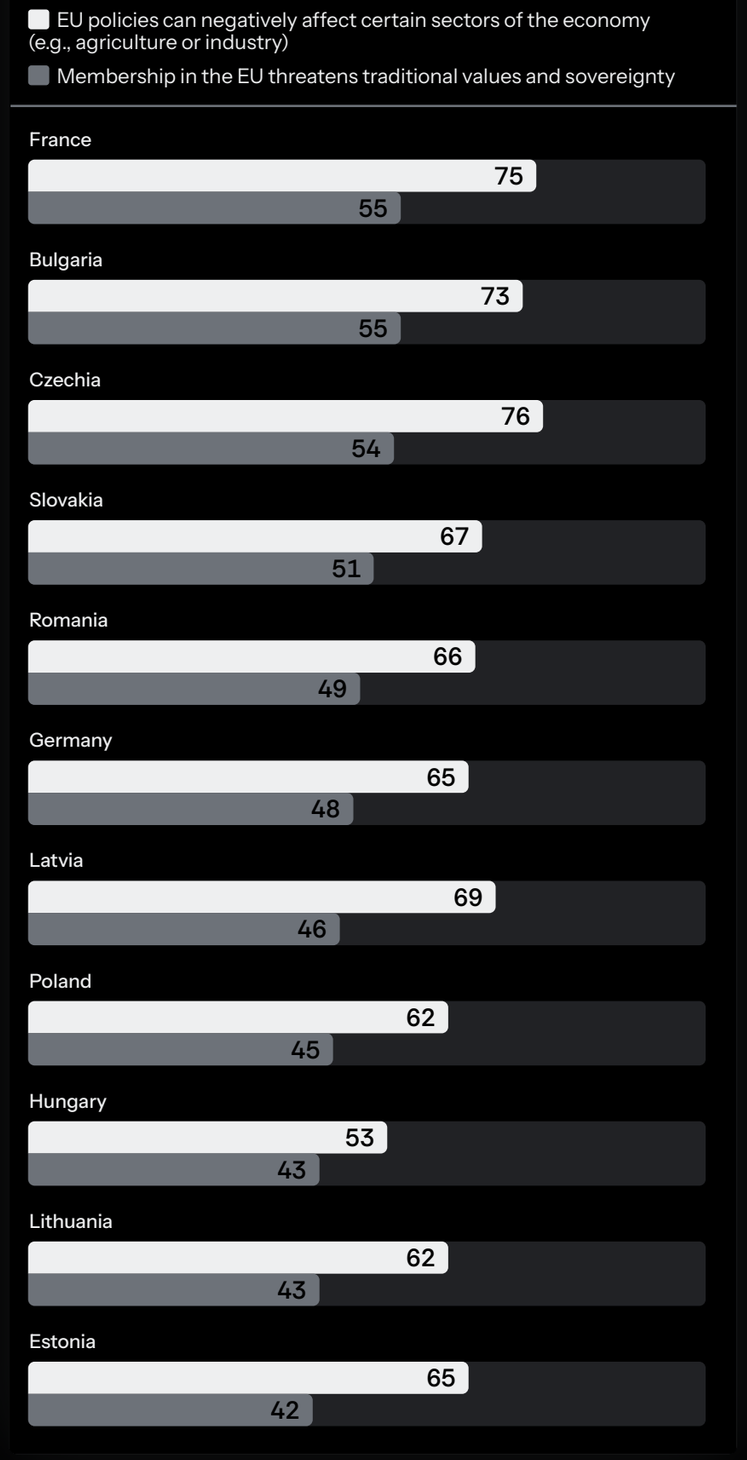
Support for membership coexists with substantial criticism, and economic considerations dominate both the positive and critical responses. Around two thirds or more in most countries agree that EU policies can negatively affect specific sectors of the economy, consistent with pushback from parts of the population against policies such as the Green Deal in several European countries[29].

Sovereignty and traditional values, which tend to be featured prominently on the agenda of far-right parties[30], appear to be less of a concern: reaching a narrow majority in only four countries.

67%

of respondents from the EU believe its policies can negatively affect certain economic sectors.

% Those who agree with the following statements:



Geopolitics

68%

of respondents, on average, see Russia as a security threat, while Germany and the US are the most widely named strategic partners.



The continuing war in Ukraine, uncertainty over the transatlantic relationship and instability across the Middle East have sharpened the basic questions of who counts as a partner and who as a threat. Across the 14 surveyed countries, the answers divide sharply between West and East.

Germany and the United States are the two most widely recognised strategic partners across the surveyed countries. Among the 4 Western countries surveyed, partnerships are largely mutual: respondents in France and Germany name each other's countries, as do those in the US and the UK.

Russia is the most widely perceived security threat by a wide margin, considered as such by more than two thirds of respondents on average and standing well ahead of China, Iran and North Korea. The divide between West and East is stark: Western societies register more concern about every external actor tested, and markedly more about China, Iran and North Korea. Proximity to the war thus does not, by itself, explain who feels most exposed. Asked about concrete actions, such as energy leverage, sabotage, the ownership of infrastructure and media, and the manipulation of information, rather than about countries in the abstract, more respondents voice concern, including in countries where neither Russia nor China is widely named as a threat.

One picture, two perspectives

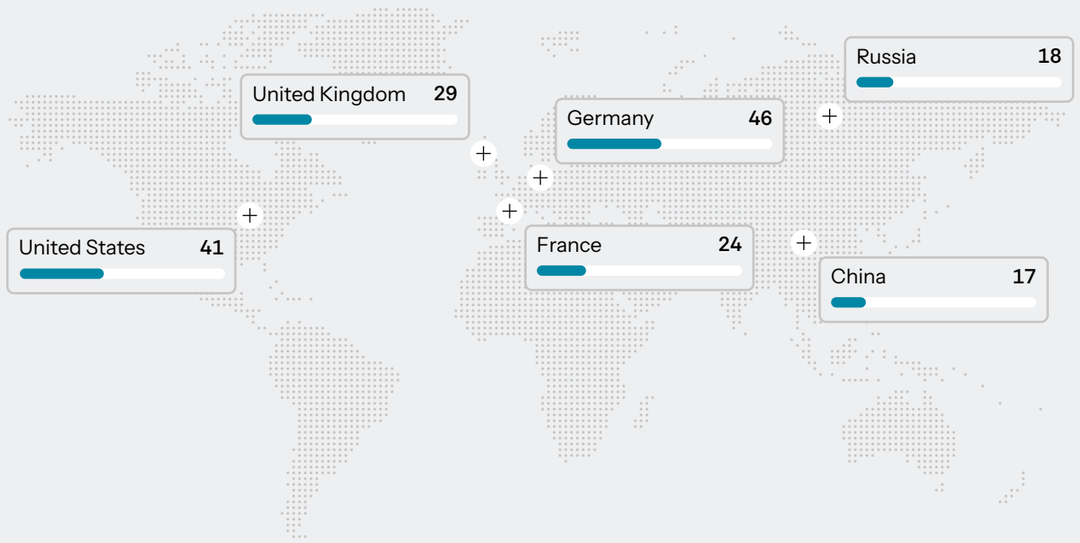
On average, Germany and the United States are the two most widely recognised strategic partners across the surveyed countries – though the picture divides between the Western and CEE perspectives.

In the West, partnership runs in pairs: France and Germany, and the US and the UK name each other first.



% Which of the following actors do you consider to be the most important strategic partners for your country today?

Average of all surveyed countries



Partners in pairs

Among the four Western countries, partnership is largely mutual, resolving into two bilateral relationships rather than a single bloc. France and Germany name one another first, likely reflecting more than seventy years of European integration. The US and the UK mirror it, in a relationship built on a common language and history alongside decades of close intelligence, nuclear and defence cooperation[31]. The bond was on display in the reciprocal state visits of recent years - President Trump's to Windsor in 2025 and King Charles's to Washington - each framed around shared history, kinship and security[32].

The pairs differ in how far each country looks beyond its immediate partner. The UK looks both ways, anchored across the Atlantic yet still placing significant weight on France and Germany. The US looks least towards continental Europe, with closest perceived ties running to London and then to China, which ranks ahead of every continental European partner. At 31%, the US figure for China is the highest recorded in any surveyed country, though it does not straightforwardly signal warmth. In US public debate China is at once rival, trading partner, and systemic competitor, and respondents may be reflecting that salience rather than expressing a preference. Germany, by contrast, is the one actor recognised across the entire Western group, and in CEE as well.

% Top three strategic partners for:

United States

#1	United Kingdom	58
#2	China	31
#3	Germany	23

United Kingdom

#1	United States	57
#2	France	37
#3	Germany	34

France

#1	Germany	59
#2	United Kingdom	46
#3	United States	33

Germany

#1	France	55
#2	United Kingdom	34
#3	United States	33

CEE: agreement with exceptions

CEE shows greater agreement: in 6 of 10 countries in the region, Germany and the US are recognised as the two most important strategic partners. Romania is the only one to place France above Germany, which may reflect France's role leading NATO's multinational battlegroup on Romanian soil, the Cincu-based Mission Aigle[33], a long-standing Franco-Romanian relationship of linguistic affinity through the Francophonie and a strategic partnership dating to 2008[34].

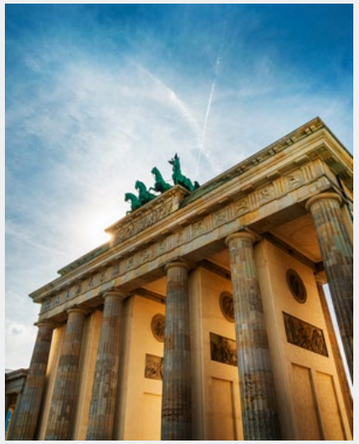
Ukraine is the only CEE country to place the UK above the US. The UK made the first Western commitment of main battle tanks after the full-scale invasion and has trained Ukrainian forces on British soil since[35].

Hungary, Slovakia, and, above all, Bulgaria stand apart, with high proportions of respondents naming Russia as one of their country's most important partners. The findings correlate with favourable attitudes towards Russia evidenced across this report, and may also be linked to a pragmatic assessment of the policies of current and former governments towards Russia[36], rather than personal preferences.

For respondents in **Bulgaria** and **Slovakia**, Russia is one of the two most important strategic partners.

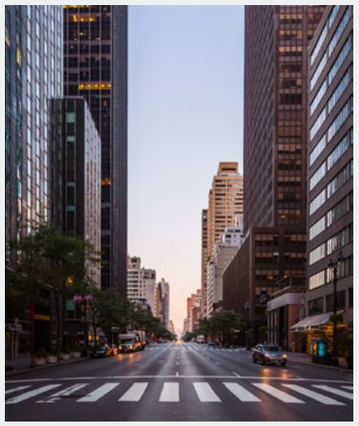
% Which of the following actors do you consider to be the most important strategic partners for your country today?

	Germany	US	UK	France	Russia	China
Bulgaria	40	24	9	14	51	25
Czechia	63	29	21	27	13	14
Estonia	50	42	37	16	14	12
Hungary	52	45	15	15	30	26
Latvia	48	39	29	16	20	16
Lithuania	68	44	26	18	9	8
Poland	37	62	32	26	7	12
Romania	28	65	12	34	11	12
Slovakia	50	23	13	19	38	18
Ukraine	44	38	49	22	6	8



Germany

Germany is the most widely recognised strategic partner overall. In CEE its weight has been mostly economic: it sits at the centre of a manufacturing bloc running through the car industries of Czechia, Slovakia, Hungary and Poland[37]. But recognition may extend beyond trade. It is strongest in Lithuania, where Germany's security commitment has taken its most concrete form – Germany activated its 45th Armoured Brigade in Vilnius in May 2025, its first permanent deployment of a combat unit abroad since 1949.[38]





United States

The US follows Germany closely, though its recognition comes from a different set of countries. Romania, among the least drawn to Germany, gives the US the strongest recognition of all. Romania and Poland host the region's most substantial US military presence: in Romania it centres on the Black Sea, anchored by the Aegis Ashore missile-defence site at Deveselu and rotational forces near the coast.[39] Recognition of the US is lowest in Bulgaria and Slovakia, both with historically less favourable attitudes towards the US recorded in previous GLOBSEC Trends[40].



United Kingdom

The UK's recognition is highest where its post-Brexit security role has been most tangible. Beyond the US, Ukraine and France, discussed above, it is strong in Estonia, where the UK has led NATO's multinational battlegroup at Tapa since 2017[41]. Elsewhere in the region, the UK's standing thins in step with that presence: moderate in Poland and the other Baltic states, where the UK contributes forces without leading them[42], and it is weakest in Romania, Slovakia and Bulgaria, where it has no comparable footprint.

France

Like Germany, France is named most by its reciprocal counterpart and neighbour. The UK follows, a bond built on decades of bilateral defence cooperation formalised in the 2010 Lancaster House Treaties[43]. Romania ranks third: there, France is the framework nation of NATO's multinational battlegroup at Cincu, part of the same reinforced Black Sea posture that lifts US recognition there[44]. Elsewhere French recognition sits at a modest level. It is weakest in Hungary and Bulgaria, where French security engagement is least visible.

In Bulgaria, more people name Russia a strategic partner than a security threat, 51% against 35%.

Russia

Perception of Russia as a key strategic partner varies widely across the 14 surveyed countries, with three outliers: Bulgaria, Slovakia, and Hungary. In Bulgaria, Russia is often viewed through historical liberation narratives, the memory of Russian intervention against Ottoman rule sustaining a degree of popular sympathy with few equivalents in the region[45]. That narrative has been reinforced by a political environment in which pro-Russian parties won elections[46], blocked reform coalitions, or opposed weapons transfers to Ukraine[47].

In Slovakia, a pan-Slavic sense of kinship supports a source of a broadly Russia-friendly disposition among part of the population[48], one that has not met resistance but rather encouragement from the top. Since returning to office in 2023, Prime Minister Robert Fico has met with Vladimir Putin three times and was the only EU leader to travel to Moscow for Victory Day[49].

Hungary lacks that kinship, but under the 16 years of Orbán-led government, it has come to be widely regarded as Russia's closest partner in the EU, repeatedly weakening EU sanctions[50] while maintaining significant economic ties with Moscow[51].





31%

of US respondents name China as one of the most important strategic partners.

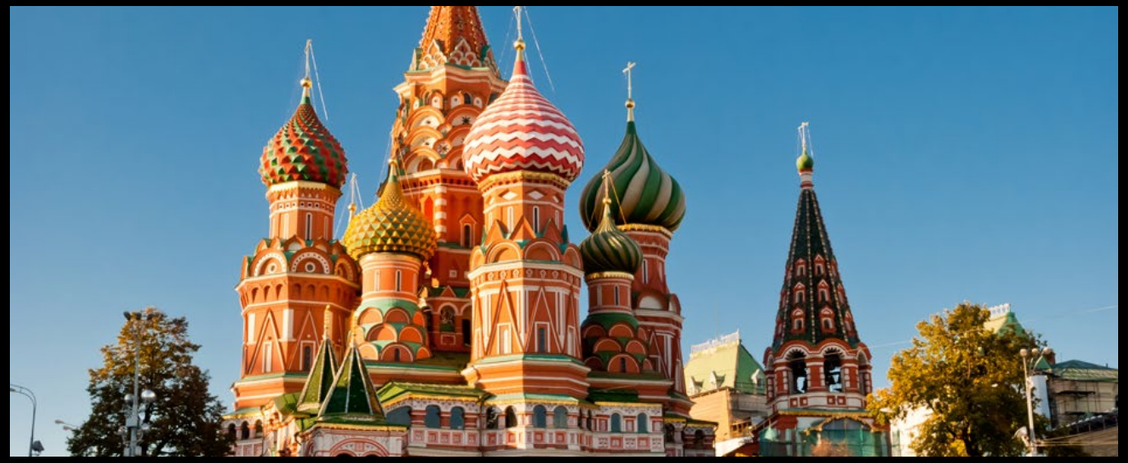
China

Beyond the US case discussed on p.43, around 1 in 4 respondents in Hungary and Bulgaria perceive China among their most important strategic partners. In Hungary, the data may reflect deep economic entanglement: since 2020, China has been the country's largest source of foreign investment, with major manufacturing facilities from CATL and BYD now operating or under construction[52].

In Bulgaria, the driver appears more political than economic: limited attention to China as a strategic rival, influence advancing through media and local academic and business partnerships, public opinion inclined to view China as a partner rather than a threat[53].

Both cases fit a documented pattern of Chinese influence-building in Europe: economic presence comes first, political goodwill and dependency follow, and the resulting leverage is then used to shape narratives and decisions.[54] The European Parliament has documented this trajectory, including investments in European media and stakes in more than twenty European ports[55]. This survey tests such activities directly - ownership of strategic infrastructure, co-ownership of media, and economic pressure to shape political decisions all feature in the threat perception section below, where they are regarded as security risks by, on average, around 61% of respondents across surveyed countries.

Perception of Threats



The West-CEE threat divide

Across the surveyed countries, Russia is seen as a security threat by more than two-thirds of respondents.

Iran ranks second, and here the West-East divide is at its sharpest: threat perception exceeds 70% in the US, UK and France, but averages 41% across CEE. This coincides with military involvement - the US is directly engaged in the war against Iran, and France and the UK maintain bases in the Middle East, several of which have been targeted since the war started in 2026.[56]

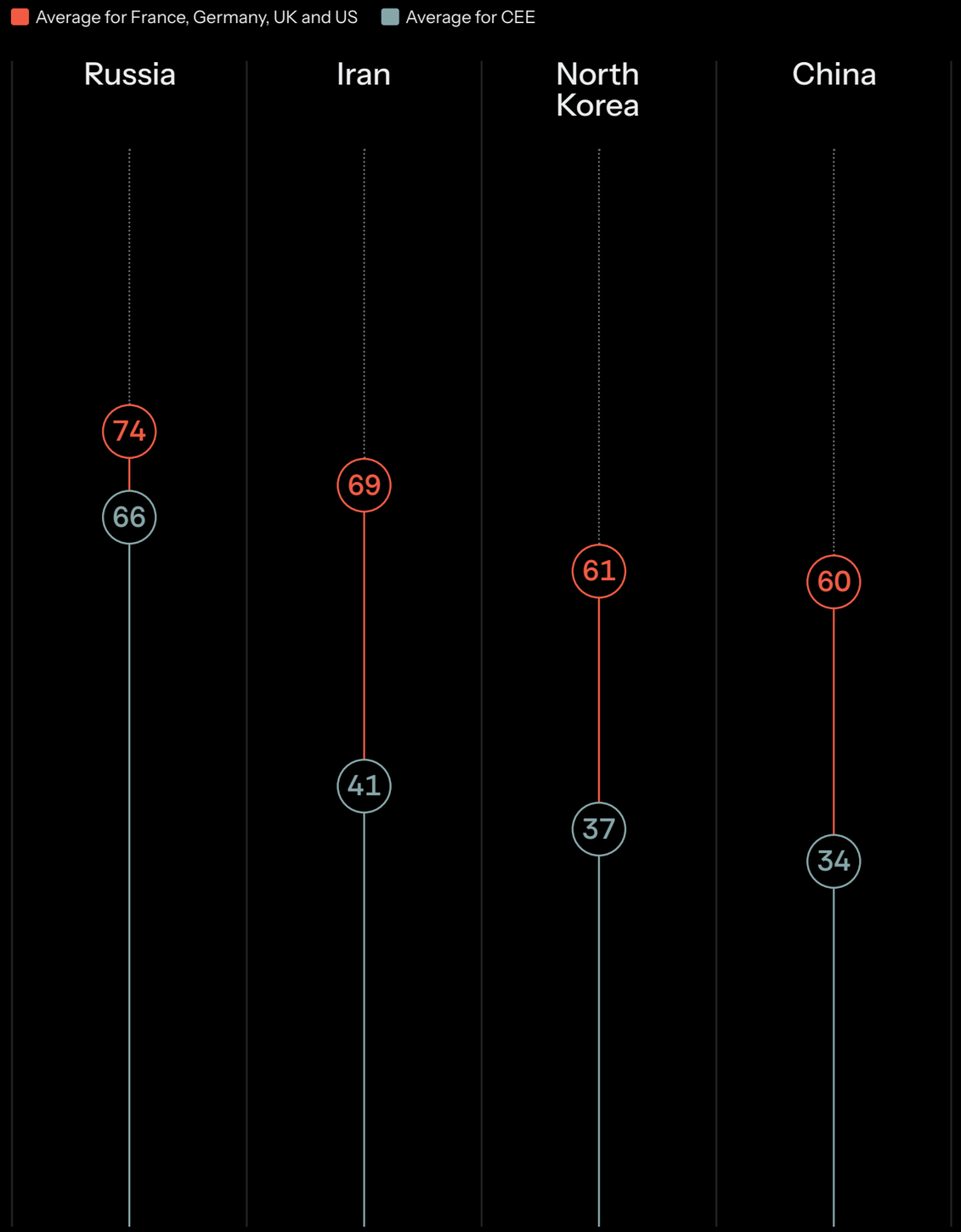
China is the least feared of the four autocracies surveyed, and here too the spread is wide - from 71% in the US to 20% in Bulgaria, showcasing that Beijing's activities draw far less concern from the CEE public than from respondents in Western countries.



69%

of respondents in the US, UK, France and Germany see Iran as a security threat, against 41% in CEE.

% Those who consider the following countries a security threat to their own country.



China: feared mostly in the West

China is identified as a security threat by 42% of respondents on average, well below Russia's 68%. That average conceals a wide gap between the US and Western Europe (60%) and CEE (34%).

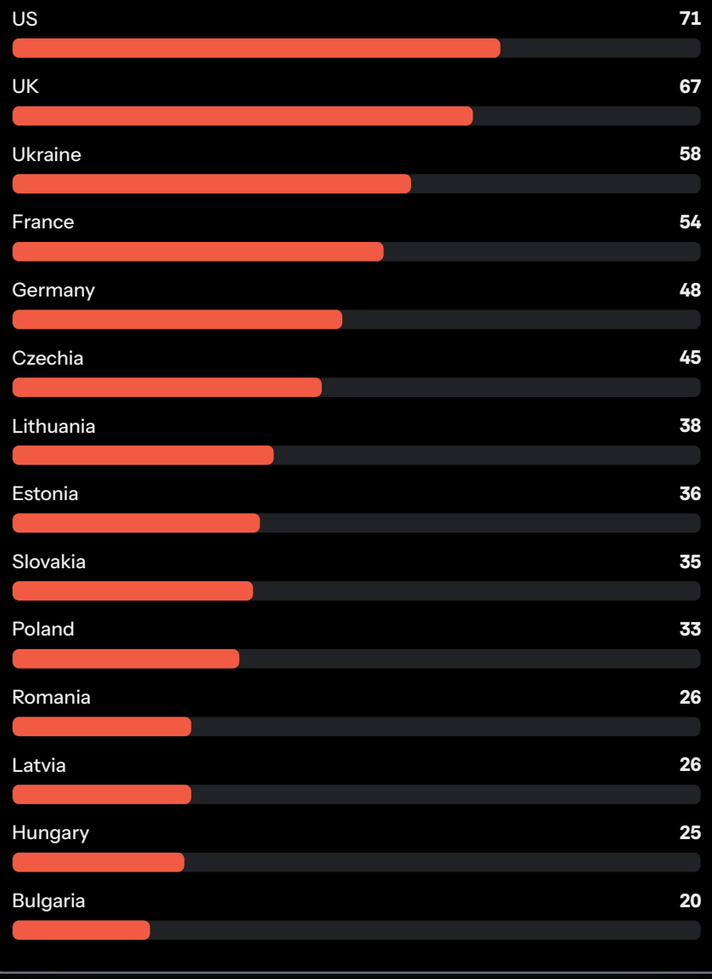
The gap reflects how differently China is read across political contexts. Western concern rests on accumulating first-hand experience of Chinese intelligence and influence activity, for example, through a German espionage conviction in September 2025 that prosecutors called the most serious such case in the country[57].

In much of CEE, China's economic presence is concentrated in Hungary and the Western Balkans, and thin elsewhere[58], with fewer and less publicised incidents.

Czechia and Lithuania are the exceptions, and in both, governments have made China a standing security concern. In Czechia, a multi-year cyber campaign against the foreign ministry was attributed to Chinese state-linked actors[59], and the authorities disclosed a plot against Taiwan's then vice-president-elect, Hsiao Bi-khim - conduct Czech intelligence described as unprecedented in Europe[60]. Lithuania, for its part, withdrew from the 17+1 format and faced the economic coercion that followed its opening of a Taiwanese Representative Office[61]. Elsewhere, incidents such as Poland's 2019 Huawei espionage case[62] have not translated into comparable threat perception, which across most of CEE remains dominated by Russia.



% Those who consider China to be a security threat to their country.



Chinese activities as security risks

% Those who consider the following Chinese activities a risk to their country's security (average of surveyed countries).

Use of economic leverage to influence political decisions (e.g., trade restrictions, investment pressure)	63
Provision of technology for telecommunications and digital infrastructure (e.g., network equipment, data systems).	62
Ownership or financing of critical infrastructure projects (e.g., ports, railways, telecommunications networks).	60
Efforts to spread misleading or manipulative information in media and social media.	59
Co-owning media organisations across Europe	58

Across the five specific activities tested, average concern ranges from 58% (media co-ownership) to 63% (economic leverage). With the exception of Ukraine, CEE respondents register lower concern than those in Western Europe on every one, by margins of 10 to 12 percentage points.

The US records the highest level of concern on every activity - consistent with a public debate in which China has for years featured as the primary rival for geopolitical and technological dominance[63]. Ukraine ranks second in concern, with economic leverage among its highest concerns, set against the trajectory of the relationship since the full-scale war, during which Beijing has become the principal external supplier sustaining Russia's economy[64]. Respondents in the UK, France and Germany cluster between 63 and 70%, with Czechia in the same band and highest among CEE countries on all five actions.

Economic leverage draws the highest concern, reflecting an escalating reality: China's tightening of export controls on rare earths and related technologies through 2025 directly affected European defence, automotive and clean-technology supply chains,[65] and the ECFR has documented how Beijing's coercive leverage works by constraining Europe's policy and business space[66].

Telecommunications and digital infrastructure, next in the ranking, tracks ongoing policy debate: in January 2026 the European Commission proposed mandatory rules to phase high-risk suppliers, including Huawei and ZTE, out of critical infrastructure across the EU[67]. This sits within a broader securitisation of China visible in national strategy documents — the UK's 2023 designation of China as an "epoch-defining and systemic challenge"[68], Germany's first China strategy, codifying the shift towards de-risking[69], and Czechia's 2023 Security Strategy, which named China explicitly for the first time as a fundamental systemic challenge attempting to change the existing international order.[70]

At the other end, Latvia and Bulgaria record the lowest figures across all five activities - Latvia as low as 38% on information manipulation, the lowest figure for any country on any of Beijing's actions in the survey. Hungary also sits below most of its CEE peers. These are also the CEE countries which have among the highest levels of recognition of Russia as a strategic partner, suggesting a pattern in which lower concern about China co-exists with more accommodating attitudes toward non-Western actors generally.



Russia: a near-universal threat

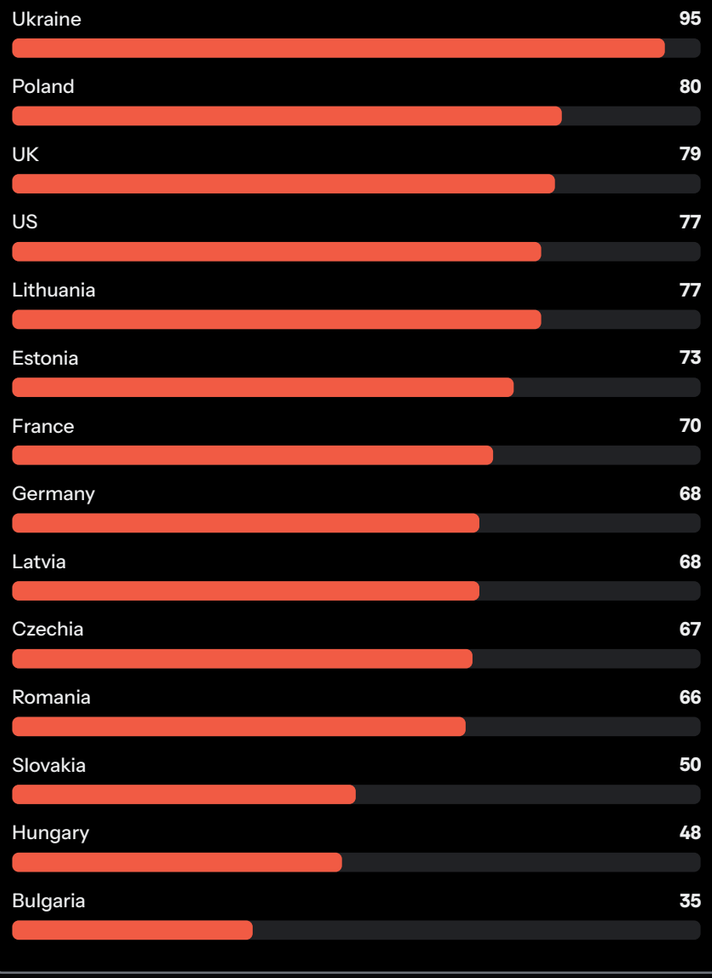
Russia is the most widely recognised security threat in 12 out of 14 surveyed countries, though the degree of concern varies enormously.

Concern is not confined to frontline states. Respondents in the UK and the US register higher threat perception than every surveyed country except Ukraine and Poland, and well above most of CEE. This tracks documented activity rather than distant solidarity: GLOBSEC and the International Centre for Counter-Terrorism identified 110 kinetic incidents in Europe attributable to Russia between January 2022 and July 2025, with Poland most frequently targeted, followed by France and Germany[71].

In 11 of 14 surveyed countries, a majority sees Russia as a security threat.



Those who consider Russia to be a security threat to their country.



Russian actions as security risks

Those who consider the following Russian activities a risk to their country's security (average of surveyed countries).

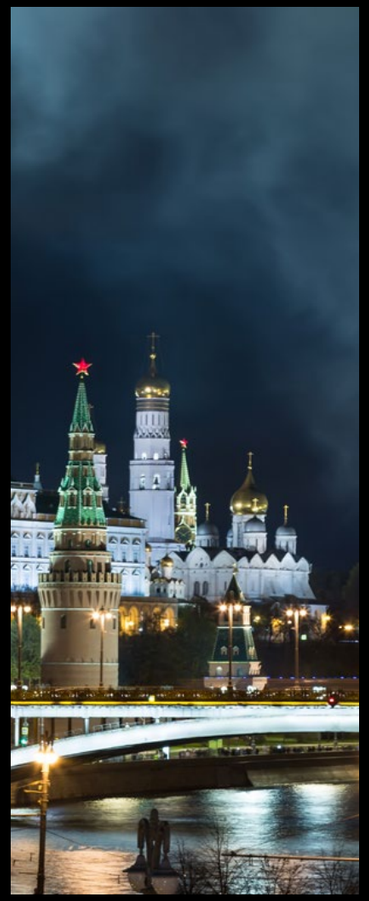
Using oil and gas exports for political and economic leverage.	76
Efforts to spread misleading or manipulative information in media and social media.	74
Cooperation with criminal networks to evade sanctions.	73
Sabotage or disruption of infrastructure in Europe (e.g., arson on arms depots, logistics hubs, derailing a train).	73
Financing political actors or groups.	72
Threatening to use nuclear weapons against Europe.	71

When respondents are asked about specific Russian activities rather than about Russia as the state, threat perception rises substantially and becomes more uniform. Across all six areas questioned, average responses cluster between 71% and 76%, with much smaller variation between countries.

Energy leverage records the highest concern, at 76% - a finding grounded in two decades of lived experience. Russia has used energy supplies as an instrument of pressure since the gas cut-offs of 2006[72] and 2009[73], which left parts of Central and Southern Europe without heating in mid-winter, and its throttling of gas exports from 2021 imposed direct costs on households and governments across the continent[74].

The sabotage figure is notable against a documented escalation in Russian hybrid activity. As GLOBSEC and ICCT note, many incidents become publicly attributable once investigations conclude, so each confirmed case — an arson, a derailment, a parcel-bomb plot — adds to a growing and increasingly visible body of evidence.[75]

Concern about nuclear threats is similarly grounded. Russia's nuclear signalling has long predated the full-scale invasion:[76] Moscow has used implicit and explicit references to its arsenal as an instrument of intimidation, and this messaging has intensified since 2022[77]. Such fears have a domestic dimension too - for example, during the 2022 debate on Slovakia's Defence Cooperation Agreement with the US, several political figures claimed the treaty would mean stationing nuclear weapons on Slovak territory[78].



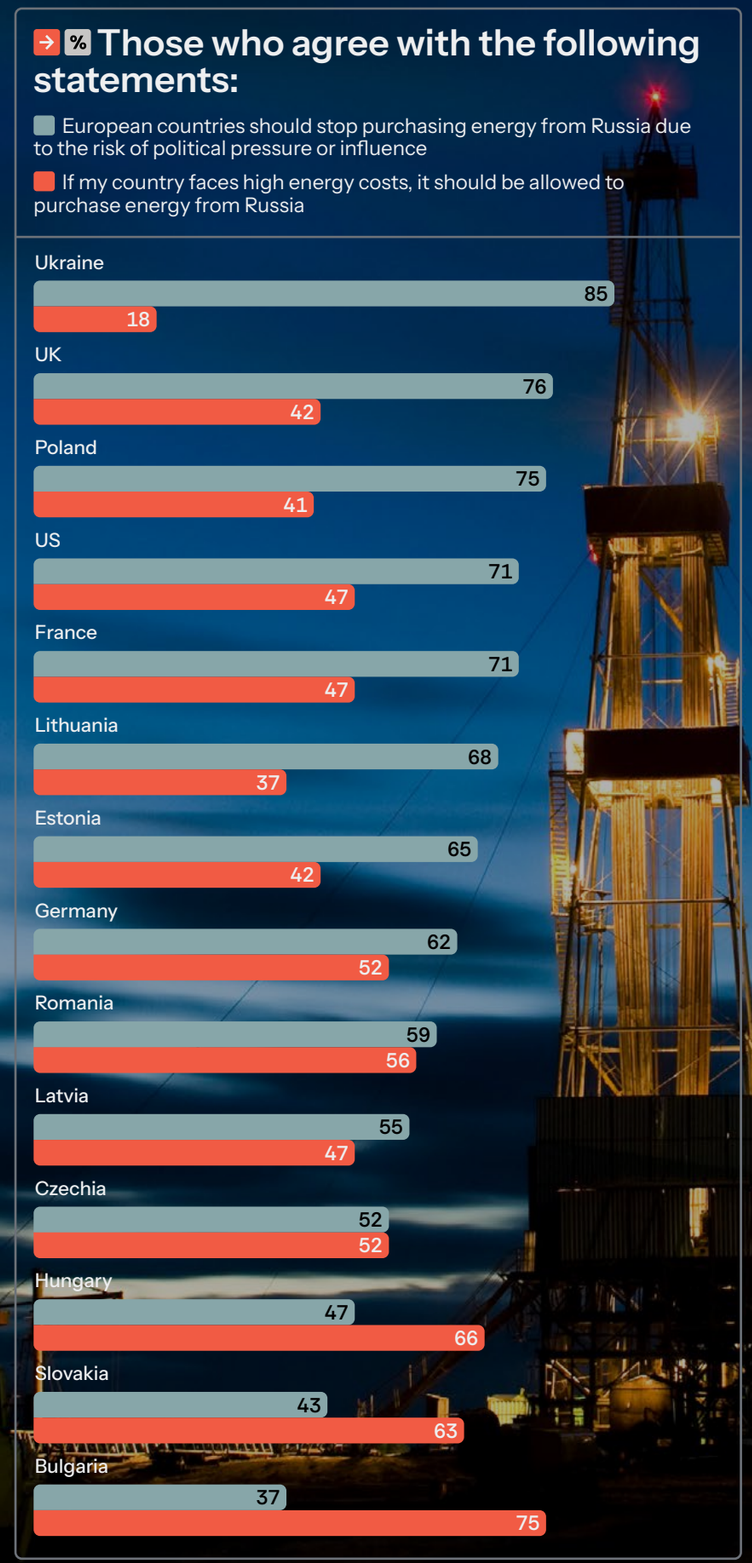
Recent crises have prompted diversification that sharply reduced European dependence on Russian supplies, but public opinion remains split between principle and price. While 62% agree that European countries should stop purchasing Russian energy given the risk of political pressure, 49% would still permit their own country to buy from Russia if energy costs ran high – rising to 75% in Bulgaria, 66% in Hungary and 63% in Slovakia.

Majorities in six countries would allow their country to buy Russian energy if prices ran high.

% Those who agree with the following statements:

European countries should stop purchasing energy from Russia due to the risk of political pressure or influence

If my country faces high energy costs, it should be allowed to purchase energy from Russia



Distant threats

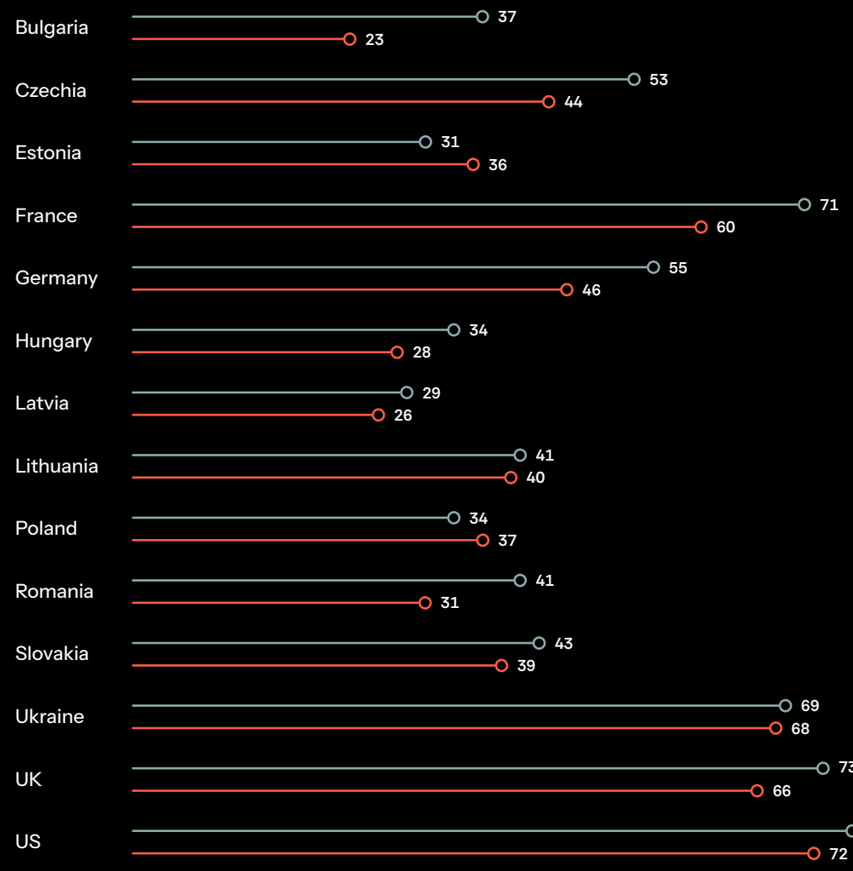
Perception of Iran as a threat is concentrated in Western countries, against the backdrop of the ongoing war between the US and Iran[79]. Tehran also remains the origin of the Shahed loitering munitions that Russia now manufactures at scale and launches against Ukraine – a direct tie to the war on Europe's eastern flank – a connection that appears to weigh little with respondents in the region[80].

North Korea draws even less concern, and again far more so in the West than in CEE. This sits alongside its deepening role in Russia's war: since 2023 it has supplied millions of artillery rounds, along with ballistic missiles and artillery systems, and from late 2024 it committed troops to fight in Russia's Kursk region[81]. As with Iran, most respondents in CEE do not appear to see this direct enablement of Russia's war as a threat to their own countries, regarding the region's security primarily through a Russia-centred lens.



% Those who consider Iran and North Korea to be a security threat to their country.

Iran North Korea



Transatlantic Relations

Europe still needs the US, but no longer automatically trusts it. 77% say the US role in European security is important, while only 54% consider the United States a reliable security partner.



The transatlantic relationship entered 2026 under strain. The US remains central to European security, but its reliability is no longer assumed. Respondents in Europe still value US engagement, yet judge US conduct critically where it appears unilateral or directed against allies.

The first half of 2026 brought a series of shocks, from Greenland and tariffs to military interventions abroad, prompting Canada's prime minister, Mark Carney, to speak of a transatlantic "rupture."[82] The data suggest, however, that the divide is concentrated around the exercise of US power — particularly where it is seen to challenge allied sovereignty, bypass consultation or impose costs on partners — rather than around the transatlantic order itself.

The divide also runs through the US itself. Respondents there have not abandoned the post-war order: narrow majorities still support alliances, international engagement and NATO. But the consensus is no longer broad enough to make US commitment appear politically settled. The country that underwrites European security is itself divided over how much of that order it still wants to carry.

Europe's answer is clear but incomplete. Broad majorities say Europe should take greater responsibility for its own security if the US reduces its role, and respondents in the US largely agree. But only half believe Europe could protect itself without strong US support, and that support weakens when responsibility is tested against Ukraine. The result is a mandate for greater European responsibility, but not yet confidence that Europe can shoulder it alone.

Greenland: a territorial red line

Greenland exposes the transatlantic divide most clearly. More than three-quarters of respondents in Europe view US efforts to acquire Greenland from Denmark negatively, while US respondents are split evenly. Yet when asked to choose, 69% of US respondents say maintaining NATO as the guarantor of security matters more for the US than acquiring strategic territory such as Greenland. The US position is therefore not straightforwardly nationalist: some see strategic value in Greenland, but most still prioritise the institutional security order.

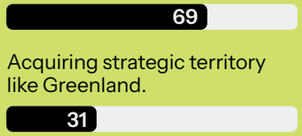
In Europe, opposition is strongest in Latvia and Ukraine, the one surveyed country whose borders have in fact been altered by great-power force. This is consistent with a reading of Greenland less as an isolated dispute than as a possible precedent - a concern that borders should not be altered through great-power pressure. The sensitivity is sharpest in the Baltic states, where memories of Soviet occupation remain central to national security thinking[83]. Respondents in Western Europe, facing a less immediate territorial threat from Russia, may view the bid more as an ally breaching international norms and damaging NATO unity.



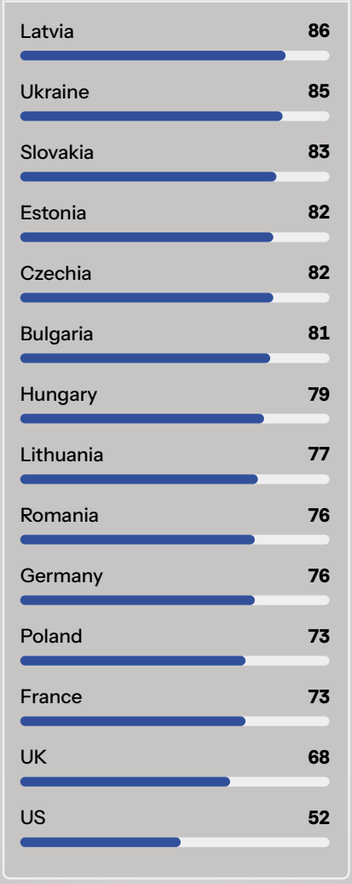
The Baltic states are among the strongest disapprovers of the US pursuit of Greenland.

% Which of the following is more important for US security?

US respondents only



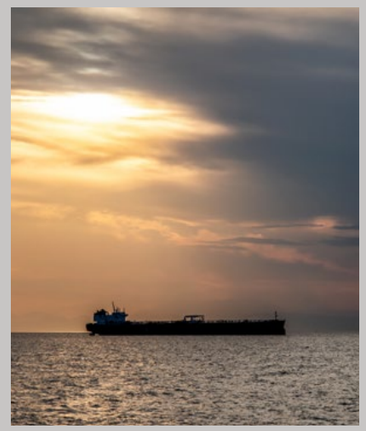
% Those who view the US efforts to acquire Greenland from Denmark for security and economic reasons negatively.



Iran and Venezuela: unilateral force

The interventions in Iran and Venezuela produce a rupture almost as wide as Greenland's. Here too, a majority of US respondents view their country's actions positively while Europe does not - but disapproval falls differently across Europe than it did on Greenland.

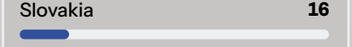
In Europe, approval sits around a quarter of respondents. It is highest in the UK and France, the two countries with the strongest expeditionary traditions of their own, and falls towards the east, bottoming out in Slovakia and Bulgaria. In both, rejection is not just widespread but intense: "strongly negative" responses reach 50–53%. This aligns with GLOBSEC Trends 2025 findings, where 43–46% of respondents in Slovakia and Bulgaria agreed that NATO is "an aggressive organisation and a tool of the US"[84]. For such respondents, US actions may appear as confirmation that Washington acts unilaterally and uses the Alliance order to project or legitimise its power.



73%

of respondents from 13 European countries surveyed view US military interventions across the world negatively.

% Those who view US military interventions across the world, for example in Iran or Venezuela, positively.



Tariffs: a hard sell in Europe

Trade is where the divide is most pronounced. A clear US majority views the trade measures positively against an average of 29% of respondents across surveyed European countries. Unlike Greenland or military interventions, tariffs exert an immediate, tangible pressure on daily economic life. US tariffs on imported goods have resulted in higher costs, retaliation rounds, and industrial adjustment[85] – economic exposure that may help explain the high disapproval rates across Europe.

Exposure alone, though, does not explain the divide, which may be read differently on the two sides of the Atlantic. For US respondents, tariffs can be understood as domestic economic policy: a tool for protecting jobs, reshoring industry, and defending national production. That interpretation fits a political context in which protectionism has become increasingly normalised across party lines[86]. Support may also reflect a domestic framing in which the cost is borne by foreign exporters, though the Kiel Institute's analysis shows the opposite: the burden has fallen overwhelmingly on US households, with foreign exporters absorbing only a small share[87].

For respondents in Europe, the same measures may carry an added dimension, read not only as trade policy but as pressure imposed by Europe's security guarantor on its own partners. Poland is the main exception. Its relative openness to the tariffs fits a wider pattern in the survey, in which Polish respondents extend Washington more benefit of the doubt than most other respondents. One plausible reading is that security considerations outweigh economic ones: for a country invested in keeping the US committed to the region[88], even unwelcome US conduct may be discounted against the greater risk of US absence.

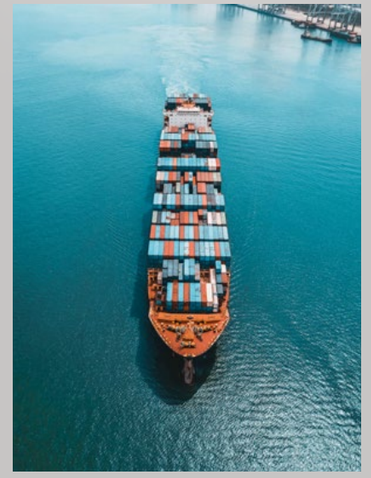


45%

of Polish respondents view the tariffs positively — 16 percentage points above the European average.

% Those who view trade measures introduced by the US affecting European industries and exports positively.

US	57
Poland	45
UK	36
Hungary	33
Germany	32
Ukraine	30
Estonia	30
France	28
Romania	27
Lithuania	26
Latvia	25
Slovakia	24
Bulgaria	24
Czechia	22



Values: more common ground

In contrast to the sharp fractures over trade and US interventionism, cultural issues reveal a narrow transatlantic divide. A slim majority of US respondents view Washington's support for conservative social actors and policies in Europe positively, against 49% across Europe.

The result coincides with a particular political climate. The same period that produced rupture over US conduct also saw the rise or consolidation of right-wing forces across parts of Europe[89]. Against this backdrop, US support for conservative social actors may not be read as foreign interference by all European respondents. Romania, where positive views are highest, is one example: George Simion and AUR have aligned themselves explicitly with Donald Trump and MAGA-style politics, campaigning on a "Make Romania Great Again" platform[90].



49%

in Europe view US influence on European conservative actors positively.

% Those who view US support for conservative social actors and policies in European countries (such as positions on family, religion, or social issues) positively.

Romania	61
Ukraine	57
US	56
Latvia	52
Estonia	52
Poland	50
Hungary	49
UK	48
Lithuania	47
France	46
Slovakia	45
Czechia	45
Germany	43
Bulgaria	42

US: lead the order, or leave it?

From the European side, the rupture can look like a consequence of US behaviour. From inside the US, it looks more like a debate still underway. Three questions asked only to US respondents point in the same direction: support for the post-war order remains, but by a relatively narrow margin.

The data show that support for the traditional US role in the world persists, but no longer looks politically settled. A narrow majority continues to favour the post-war model of strong alliances, multilateral cooperation and active engagement in international organisations. Yet a sizeable minority prefers a more nationally focused approach, of the kind set out in the White House's America First Priorities[91]. US commitment to the international order therefore survives, but on a thinner and more contested foundation than before.

Other data point to a longer erosion of the US foreign-policy consensus: long-running Chicago Council polling shows support for the US taking an active part in world affairs stood at 71% after 9/11, fell to 56% in 2024, and recovered only slightly to 60% in 2025[92].

That does not amount to support for abandoning the Alliance; it may reflect frustration with the terms of the bargain instead. On common security and defence, US respondents are almost evenly split; 51% say European nations have been taking advantage of the US, while 49% say they have treated the US fairly. At the same time, 60% view positively the US demand that NATO members raise defence spending to 5% of GDP.

51%

of US respondents say European nations have been taking advantage of the US on security and defence.

Which of the following comes closer to your view?

The US should maintain the post-World War II global order with strong alliances and multilateral cooperation — 54

The US should focus on its own interests and rely less on traditional alliances like NATO — 46

US respondents only

Do you think the US should remain actively engaged in international organisations (e.g. UN, NATO) or reduce its involvement and focus more on national interests?

Remain engaged — 55

Focus nationally — 45

US respondents only

Overall, have European nations...

been taking advantage of the US on common security and defence? — 51

treated the US fairly? — 49

US respondents who said yes

The guarantor as threat

More than a third of respondents in Europe now view the US as a security threat, with a clear regional divide: around half in Germany, France and the UK hold this view, compared with roughly a third across CEE.

Germany is the only surveyed country where a majority sees Washington as a security threat. Separate polling suggests this view has risen sharply and recently: an Allensbach survey found 65% of German respondents ranking the US among the top global risks in 2026, up from 24% in 2024[93]. The compressed timeline is consistent with the change in US administration.

Those who believe the US currently poses a security threat to their country.

Germany	52
France	47
Bulgaria	47
UK	45
Slovakia	44
Czechia	38
Latvia	32
Ukraine	31
Estonia	25
Lithuania	25
Romania	24
Poland	23
Hungary	21

Engagement without dependence

Despite weakening confidence in Washington — only 54% of European respondents see the US as a reliable security partner — most respondents in Europe want continued US engagement. Across the European countries surveyed, 64% say the US should remain engaged in organisations such as NATO, the UN, and global agreements. Support is strongest where exposure to US retrenchment is greatest: around three quarters of respondents in Poland, Lithuania and Ukraine. As elsewhere, only Bulgaria and Slovakia break the pattern, with fewer than half wanting continued engagement.

This preference does not contradict support for greater European responsibility. If the US reduces its role in European security, 84% of respondents in Europe say Europe should increase its own responsibility.

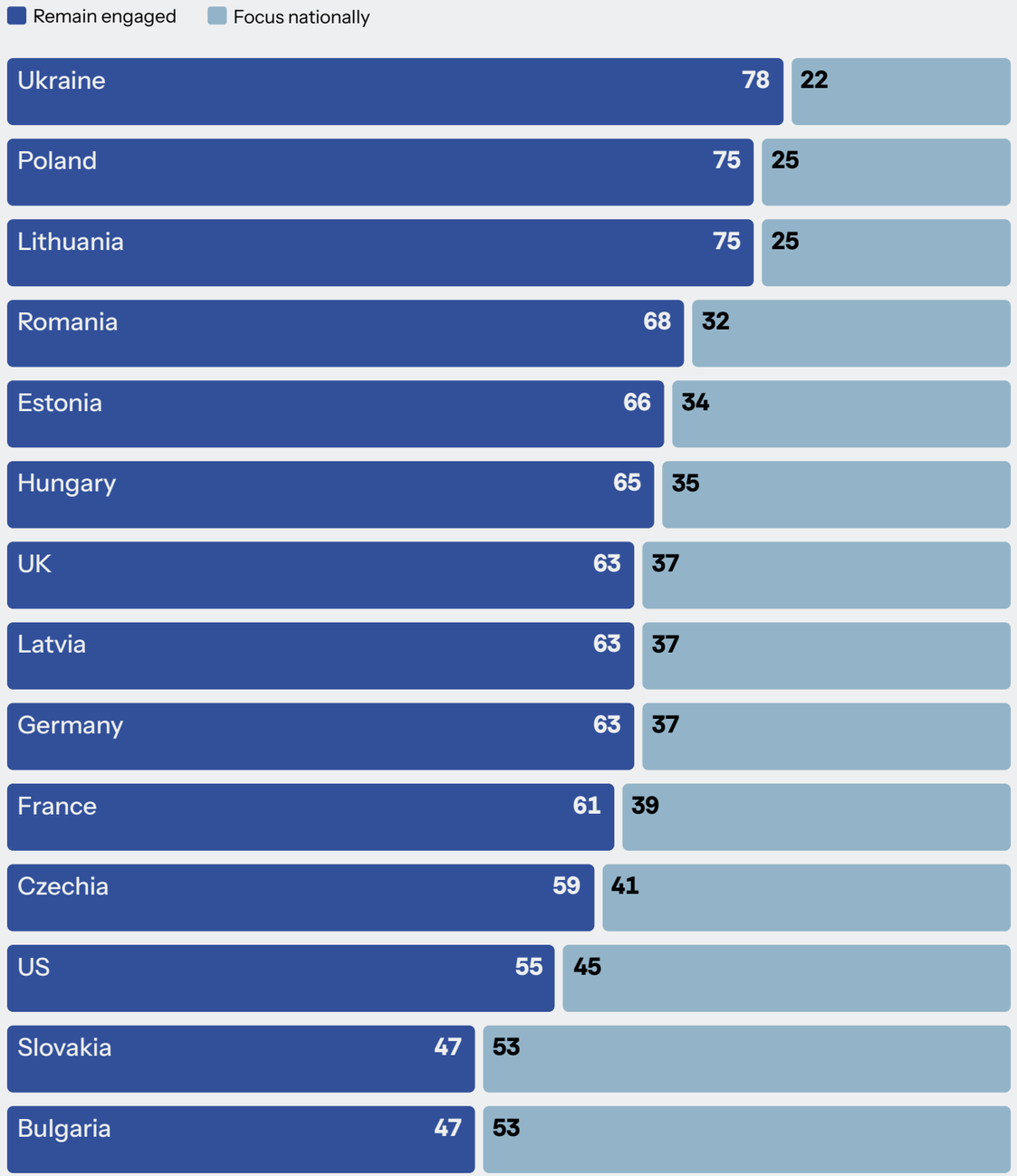
84%

of respondents in Europe say Europe should take on more responsibility for their own security.

% Those who think European countries should increase their own responsibility if the United States were to reduce its role in European security.



% Do you think the US should remain actively engaged in international organisations such as the UN, NATO, or global agreements, or reduce its involvement and focus more on national interests?



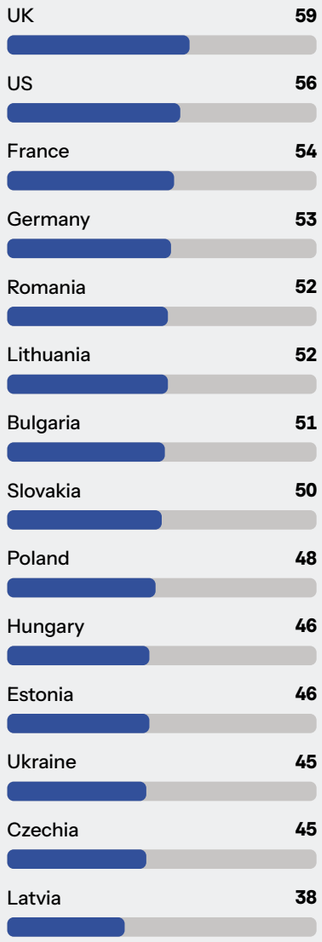
Willing — but able?

The mandate is clear, but confidence in Europe's ability to act on it is far weaker. Asked how confident they are that European countries could ensure their own security without strong US support, respondents split evenly. Set against the 84% who want Europe to take more responsibility should the US reduce its role, this suggests the mandate may be less about self-reliance than about a greater European contribution within a continuing alliance.

Confidence mostly declines as one moves east, reaching its lowest point in Latvia. The US responses fit the pattern described in the previous section: many US respondents consider that Europe has relied too heavily on the US and could manage with less, and so see less risk in stepping back.



% Those who are confident that European countries could ensure their own security without strong support from the US.



49%

in Europe, on average, believe Europe could ensure its own security without the US.

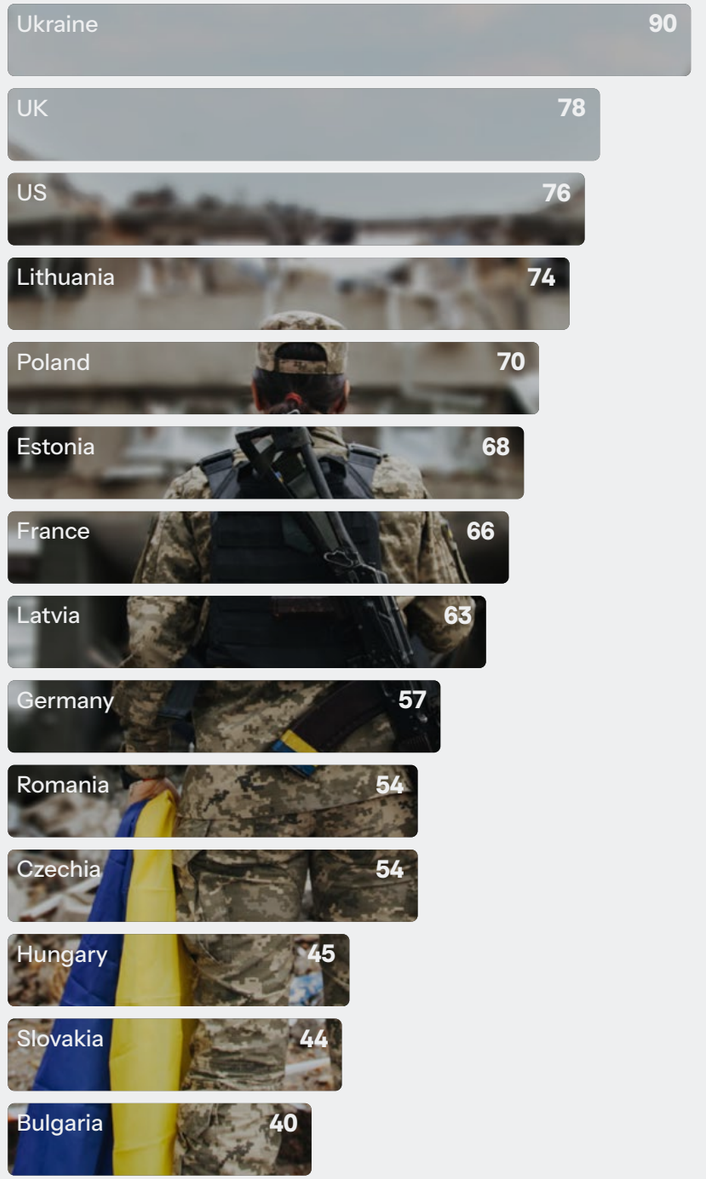
The test case

62% of respondents in Europe agree that Europe should continue supporting Ukraine regardless of the level of US involvement - a clear majority, but more than 20 percentage points below the share backing greater European responsibility in principle. The gap marks the distance between endorsing responsibility in general and accepting one particular claim on it, and suggests that not all respondents connect Europe's security to continued support for Ukraine (find out more in chapter on Ukraine).



Where support holds, it is strong: the UK leads among European countries, followed by Lithuania and Poland. US respondents also agree, which suggests the US public has not turned against Ukraine's cause as such. Read alongside the burden-sharing findings in this chapter, this suggests that strain may arise more from how the costs are shared than from support for Ukraine itself. Respondents in Europe are sharply divided on this question: agreement ranges from 78% in the UK to 40% in Bulgaria. A real reduction in US involvement could therefore test more than the transatlantic relationship — it could expose a divide within Europe itself.

% Those who agree that Europe should continue supporting Ukraine regardless of the level of the US involvement



Ukraine

In every country surveyed, at least 73% would accept a settlement only with credible long-term security for Ukraine, and a majority want the country anchored in the EU, NATO, or both.



Four years into the full-scale invasion, respondents from the surveyed countries have reached a degree of clarity about the war. Throughout the transatlantic space, majorities identify Russia as responsible, believe Ukraine's fight matters for their own security, and want to see the country anchored within the Western community rather than left outside it. Support for continued military assistance holds up in most countries, as does the conviction that any peace must be just and durable rather than a quick settlement without proper guarantees. The appetite to keep backing Ukraine, this data suggests, has not collapsed under the strain of a prolonged war.

What is less settled is the price of peace. Respondents nearly all agree that a settlement must be just — but divide sharply over whether Ukraine should cede territory to achieve one. The Kremlin's effort to blur the question of responsibility, meanwhile, has found some traction in the societies most affected by Russian information operations: in Bulgaria, false narratives command more agreement than the accurate account, and in Slovakia almost as much.

Who is responsible?

Disputing Russia's responsibility for the war has been one of the central aims of the Kremlin's information operations since the full-scale invasion began. The data show that the reality on the ground has registered with majorities across Europe, who identify Russia as primarily responsible – but they also point to a partial success of the Kremlin's propaganda strategy. In Romania and Czechia, around 40% of respondents believe that Ukraine bears responsibility, and in Germany and the US around 40% place part of the blame on both Ukraine and alleged Western provocation. The clearest effect appears in Hungary, Slovakia, and - most of all - Bulgaria, where more respondents agreed with false statements than with the accurate account.



These results broadly reflect earlier GLOBSEC Trends measurements in 2024 and 2022, which found strong belief in manipulative narratives in Bulgaria and Slovakia[94] - countries with historically more favourable attitudes towards Russia and greater receptiveness to Kremlin-aligned messaging.[95]

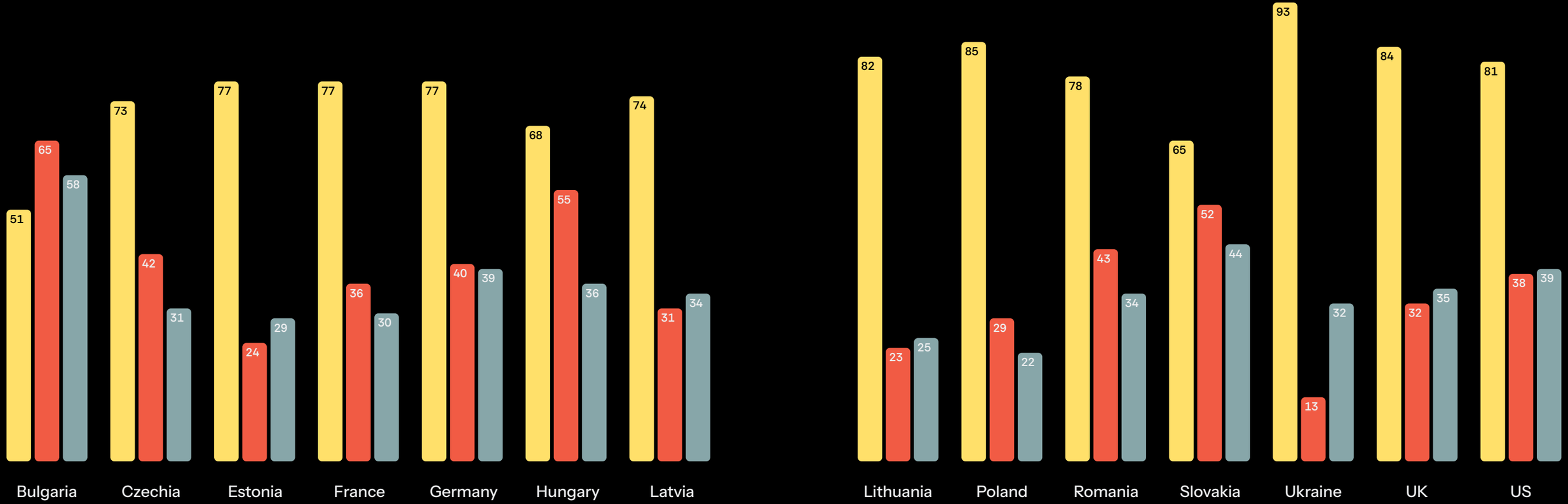
In **Bulgaria**, more respondents accept the Kremlin's narratives about the war than hold Russia responsible for it.

Those who believe the following statements are true in the context of who is responsible for the war between Russia and Ukraine.

Russia invaded Ukraine and is primarily responsible for the war

Ukraine was oppressing Russian-speaking minorities on its soil, and it justifies Russia's invasion

Europeans and Americans provoked the invasion and are therefore responsible



Ukraine fights for Europe

Majorities in most polled countries agree that Ukraine's fight against Russia matters for their own country's security, and several patterns stand out.

First, agreement is strongest in the countries with the most direct historical experience of Russian invasion and those that military experts assess as the most probable targets of a future one.[96]

Second, it is also strong in France and the UK. Both countries are nuclear-armed powers with permanent UN Security Council seats and have leading roles in the "coalition of the willing" coordinating European support for Ukraine and reinforcing the understanding that Europe's security order as a whole is at stake[97].

Third, geographic distance does not appear to diminish perceptions of the stakes: more US respondents consider Ukraine's fight important for their security than respondents in several European countries, including some neighbouring Ukraine. This is consistent with the Reagan Institute Summer Survey, which found the preference for US global leadership over isolationism rising from 40% in 2022 to 64% in 2025.[98]

Fourth, agreement is lowest in Bulgaria, Slovakia and Hungary — the same countries that appear throughout this report as most sympathetic to Russia. In Hungary and Slovakia this holds despite their Eastern Flank position, their proximity to Ukraine, and their own histories of Soviet, Russia-led invasion in 1956 and 1968.

Those who agree that Ukraine's fight against Russia is important for the future security of their country.

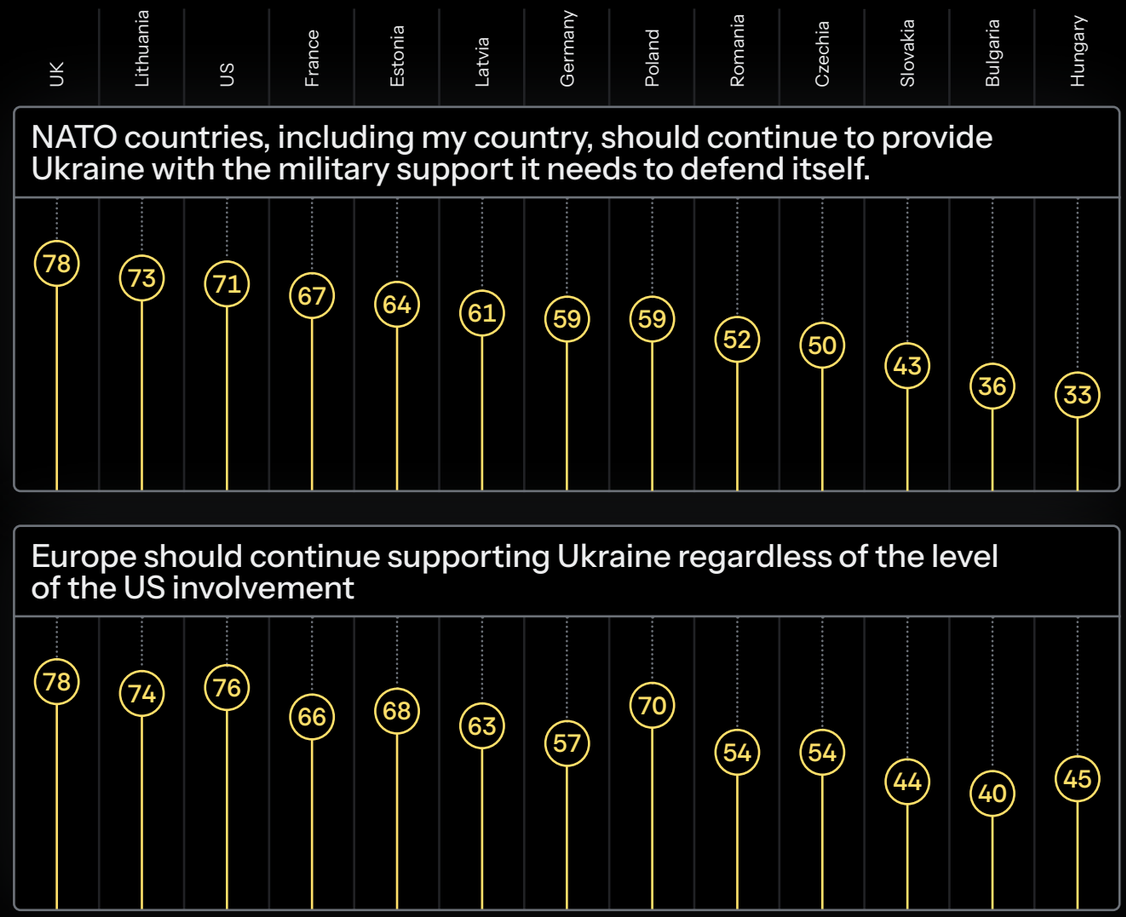


57%

of respondents in NATO member countries back continued military support to help Ukraine defend itself.

West and Baltics lead on solidarity

Those who agree with the following statements:





According to Kiel Institute's Ukraine Support Tracker[99], the US, Germany, and the UK remain the largest donors to Ukraine in nominal terms - combining bilateral military and financial aid since the start of the full-scale invasion, excluding funds channelled through EU institutions – while the Baltic and Nordic states lead as a share of GDP. Public backing broadly tracks this: the countries that rank among the most generous donors, whether nominally or by GDP share, also tend to show the strongest support for aid. Backing is also high in the US, despite a shift in political posture of the new administration over 2025-2026.[100]

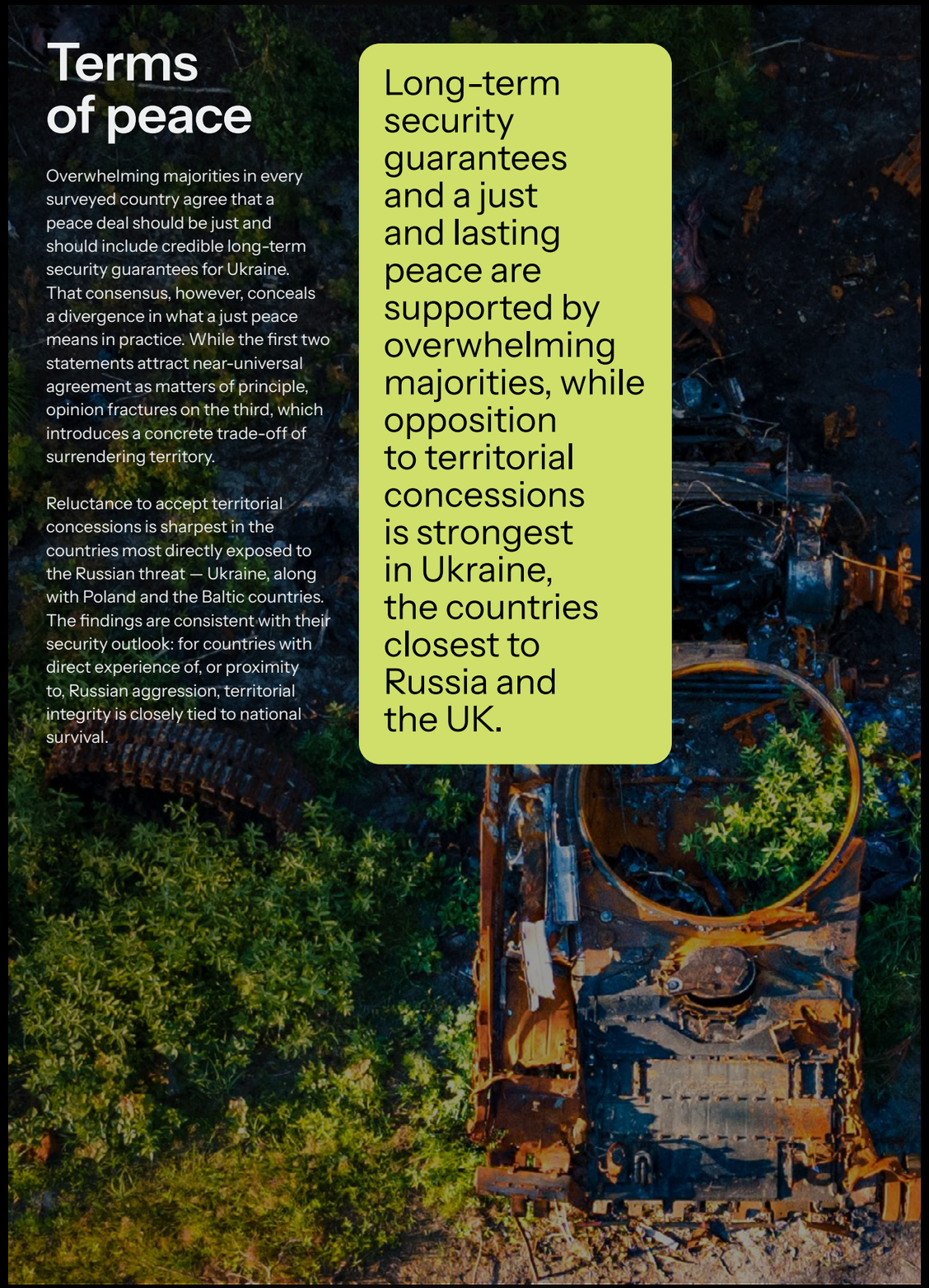
If the US withdrew its support, a majority in most countries surveyed would want Europe to keep helping Ukraine on its own. In most of these countries, the share willing to support Ukraine without the US is as high as, or higher than, the share backing support alongside the US.

Terms of peace

Overwhelming majorities in every surveyed country agree that a peace deal should be just and should include credible long-term security guarantees for Ukraine. That consensus, however, conceals a divergence in what a just peace means in practice. While the first two statements attract near-universal agreement as matters of principle, opinion fractures on the third, which introduces a concrete trade-off of surrendering territory.

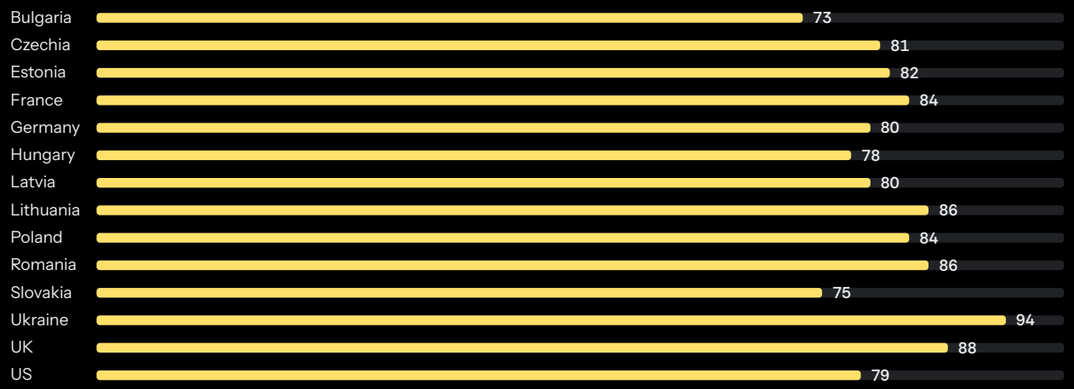
Reluctance to accept territorial concessions is sharpest in the countries most directly exposed to the Russian threat — Ukraine, along with Poland and the Baltic countries. The findings are consistent with their security outlook: for countries with direct experience of, or proximity to, Russian aggression, territorial integrity is closely tied to national survival.

Long-term security guarantees and a just and lasting peace are supported by overwhelming majorities, while opposition to territorial concessions is strongest in Ukraine, the countries closest to Russia and the UK.

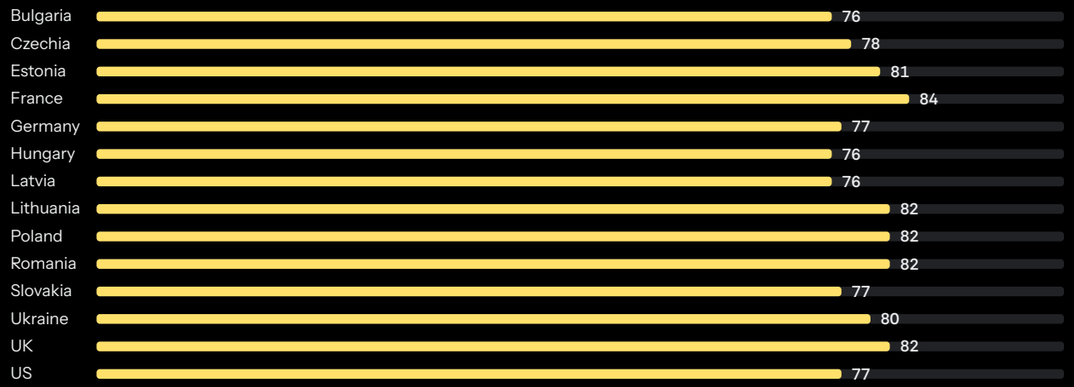


Those who agree with the following statements:

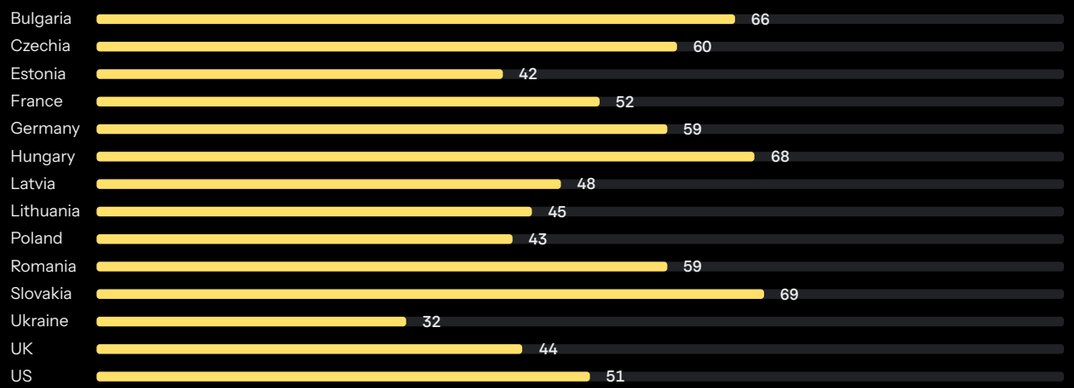
A negotiated settlement should only be accepted if it provides credible long-term security for Ukraine.



A just and lasting peace is more important than ending the war quickly.



Ukraine should be ready to give up a portion of its territory as part of a peace agreement that ensures long-term security.



EU? NATO? Both?

While no unified position on Ukraine's future holds across the polled countries, one finding is consistent: a majority would prefer Ukraine integrated into at least one of the two organisations rather than left outside both. Both European and US publics, in other words, lean towards seeing Ukraine within the Western community rather than beyond it.

Beneath that baseline, attitudes diverge. Support is generally warmer towards Ukraine's EU integration than its NATO accession. This fits the wider policy context: EU accession is the more advanced prospect, with negotiations intensifying[101], while NATO membership, though backed by allies[102], cannot proceed while the country is at war. President Zelenskyy has himself offered to set aside NATO membership in exchange for peace.[103]

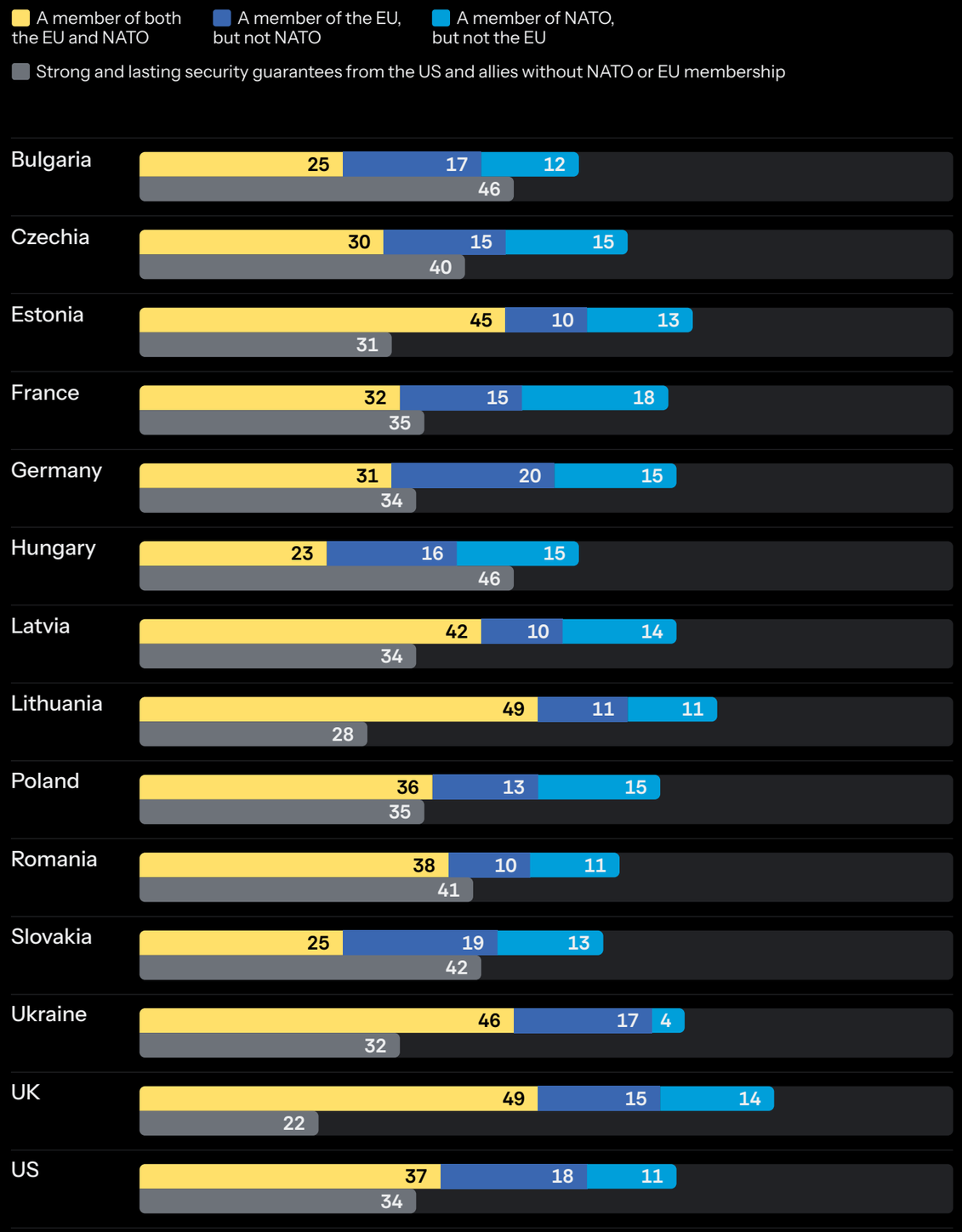


Support for EU membership is not uniform. Combining those who would prefer to see Ukraine in the EU alone with those favouring joint EU and NATO membership, only Lithuania (60%) and Estonia (55%) register a clear majority. The rest range from 39% in Hungary to 52% in Latvia.

The UK stands out once more in its support for Ukraine: fewer UK respondents would prefer Ukraine outside both organisations than respondents in Ukraine itself. More broadly, the countries most supportive of full membership (Lithuania, Estonia, Latvia, Poland, and the UK) are largely those that recur through this report as the most solidary and the most attuned to the Russian threat, a pattern linking threat perception to support for Ukraine's Western integration.

If a referendum were held in Ukraine, 75% would vote to join the EU 65% would vote to join NATO.

Which of the following best reflects your preferred future for Ukraine?



Democracy



84%

say democracy is good for their country, yet only 8% consider their own democracy fully functioning.

Democracy remains the preferred form of governance across the surveyed countries, but confidence in its functioning is fragile. On average, 84% of respondents agree that democracy based on the rule of law, fundamental freedoms, equality and human rights is good for their country. Yet this broad support sits alongside deep dissatisfaction with democratic performance.

In 11 of 14 countries, majorities distrust their national government to ensure democracy functions effectively. In 13 of the 14 surveyed countries, most say democracy is under threat, with corruption, inequality, weakening checks and balances and declining trust in institutions ranking among the threats most often identified. As democratic backsliding increases across both established and younger democracies, frustration with how democracy works coincides with greater openness to non-democratic alternatives[104]. The challenge is therefore no longer simply to preserve support for democracy as an ideal, but to demonstrate that democratic institutions can deliver security, accountability and effective governance.

Strong on the ideal

The belief that a democratic system based on the rule of law, fundamental freedoms, and human rights is good for the country reaches a strong consensus and is the same as the 84% average support recorded across CEE the previous year[105]. But while the ideal of democracy enjoys broad support, more specific questions reveal significant concerns in how its principles and institutions are seen to function.

% Those who agree that democracy as a system based on the rule of law, fundamental freedoms, equality and human rights is good for their country.

Ukraine	91
UK	87
Poland	87
Romania	86
Estonia	86
Germany	86
Hungary	86
Czechia	85
France	84
US	84
Lithuania	83
Slovakia	81
Bulgaria	78
Latvia	77

Rotten Tomatoes' review

When asked to move beyond support for democracy as a system and assess whether their own democracy actually works, majorities in every surveyed country do not believe that democracy is fully functioning in their countries. On average, 52% said democracy in their country has some problems but generally works, 29% declared it has major problems, and 11% thought it is not a democracy at all.

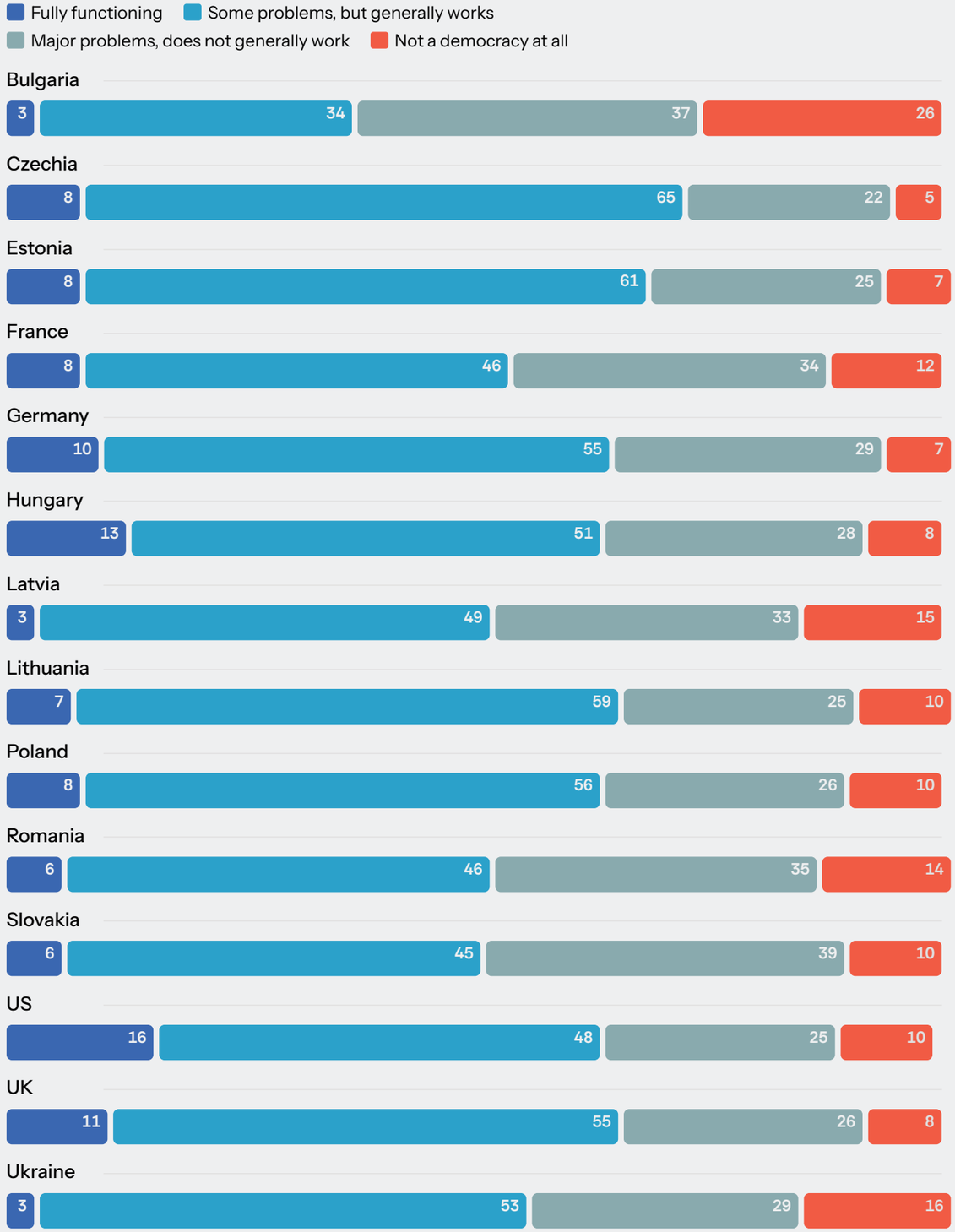
Perceptions of major problems appeared across all surveyed countries, with little difference between younger and older democracies or along an "East-West divide". A similar picture appears elsewhere: the Pew Research Center's Spring 2026 Global Attitudes Survey, fielded across 16 high-income countries, found that the US recorded the sharpest fall in democratic satisfaction of any country surveyed, declining from 37% in 2025 to 30% in 2026[106].



8%

call their democracy fully functioning, while 41% say it has major problems and does not generally work, or is not a democracy at all.

% Which of the following best describes your view of democracy in your country?

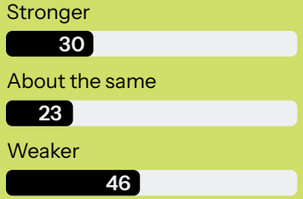


A shared sense of decline

The findings suggest the performance gap in our data is a transatlantic one, consistent with a longer decline in trust in institutions and democratic processes documented elsewhere[107]. In fact, a majority of respondents in 13 of 14 countries believe their democracy is under threat and in 8 of 13 European countries respondents judge democracies in Europe weaker than 10 years ago; 46% of respondents in the US say the same about their own.

These perceptions sit alongside external long-term indicators. V-Dem data describe a "great reversal" in democratic progress - with the erosion of democracies and a resurgence of autocracy - showing that global democracy levels have effectively returned to 1978 levels[108]. For the first time in over 50 years, the US has lost its status as a liberal democracy in the ranking[109].

% Do you think democracy in the US today is generally stronger or weaker than it was ten years ago?



% Those who believe democracies in Europe today are weaker than they were ten years ago.

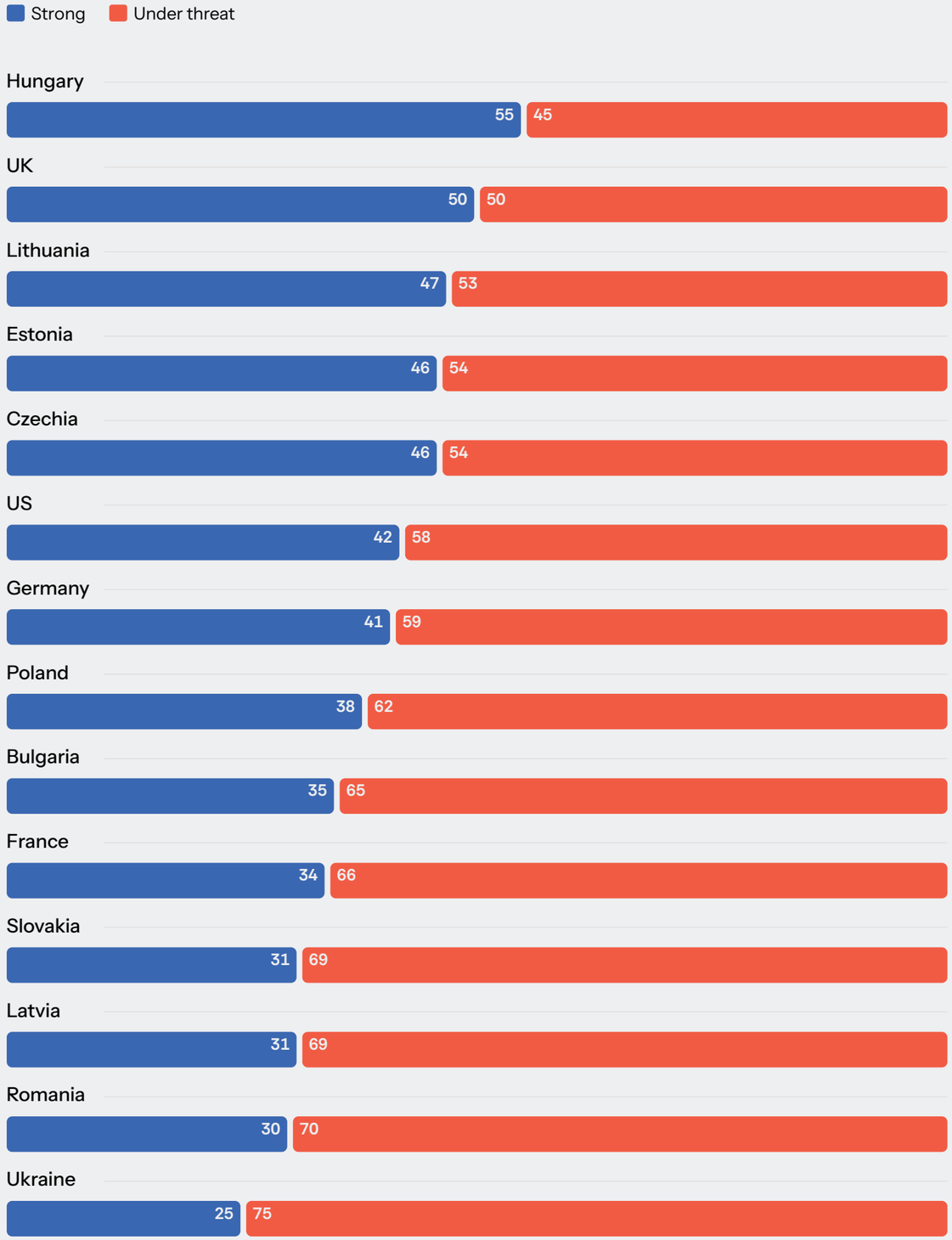


Hungary: a positive outlier

Hungary is the only country where a majority of respondents believe that democracy in their country is strong. This may reflect renewed optimism following the April 2026 parliamentary election, which ended Viktor Orbán's 16 years in power and gave Péter Magyar's TISZA party a two-thirds majority. The new government has launched a series of reforms aimed at restoring the rule of law and media freedom in the country[110].



% Do you believe democracy is under threat or democracy is strong in your country today?



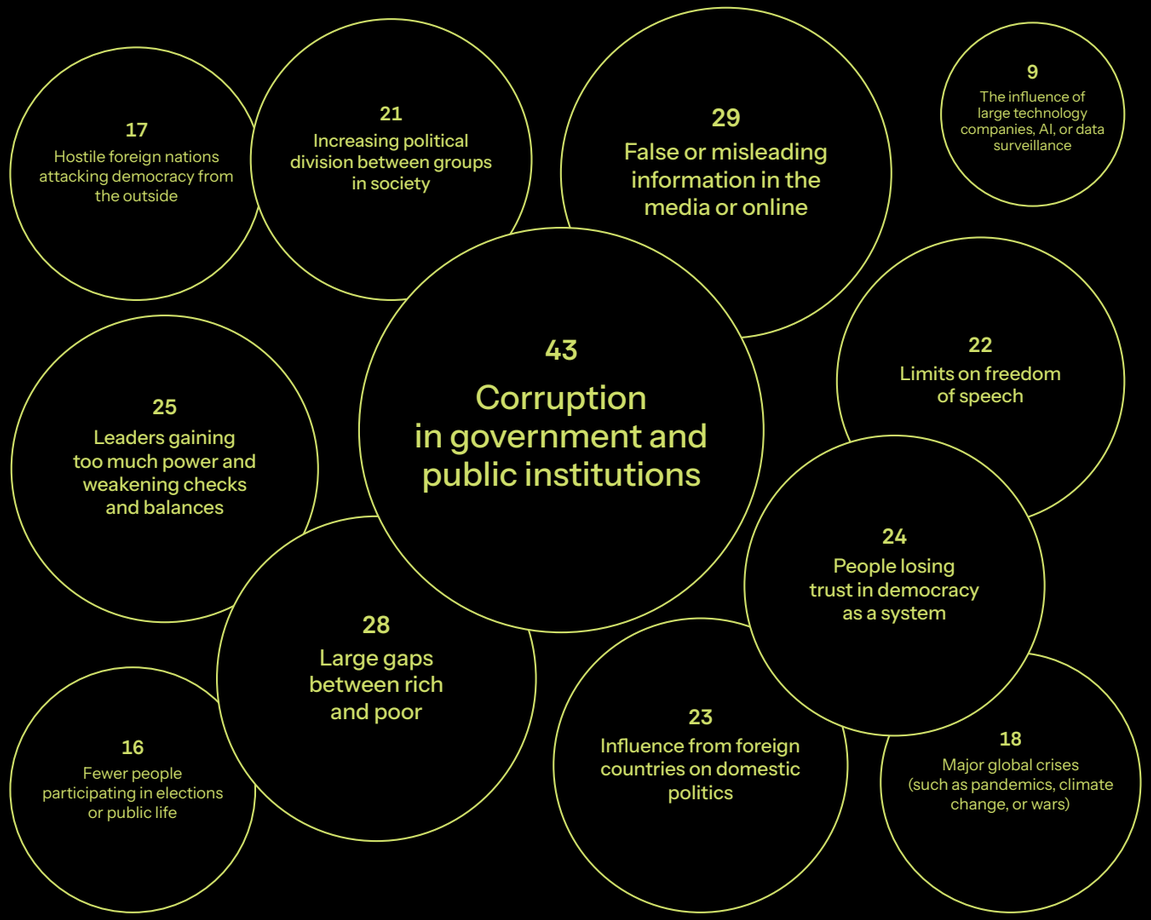
Internal threats at the centre

When respondents were offered a list of possible threats to democracy and asked to choose the three most serious, they ranked internal problems above external ones. Corruption in government drew the most selections, followed by the gap between rich and poor, leaders gaining too much power, loss of trust in democracy, political division and falling participation — while hostile foreign attacks and global crises ranked lower. The one high-ranked exception to the internal pattern is false or misleading information, the second most selected option overall.

The top-ranked options echo documented trends. Transparency International's Corruption Perceptions Index links corruption and democratic decline as mutually reinforcing - as checks and balances weaken, the opportunities for state capture by private interests grow. Furthermore, citizens are increasingly sensitive to corruption scandals involving their political leaders, fuelling the belief that the state is no longer an upholder of rights and law, and that independent checks and balances are being weakened[111]. Selections citing leaders gaining too much power align with V-Dem indicators, which identified "executive aggrandisement" in several CEE countries, including Hungary and Slovakia, and found that legislative constraints in the US - Congress' ability to check the president - have reached their lowest point in over 100 years[112].

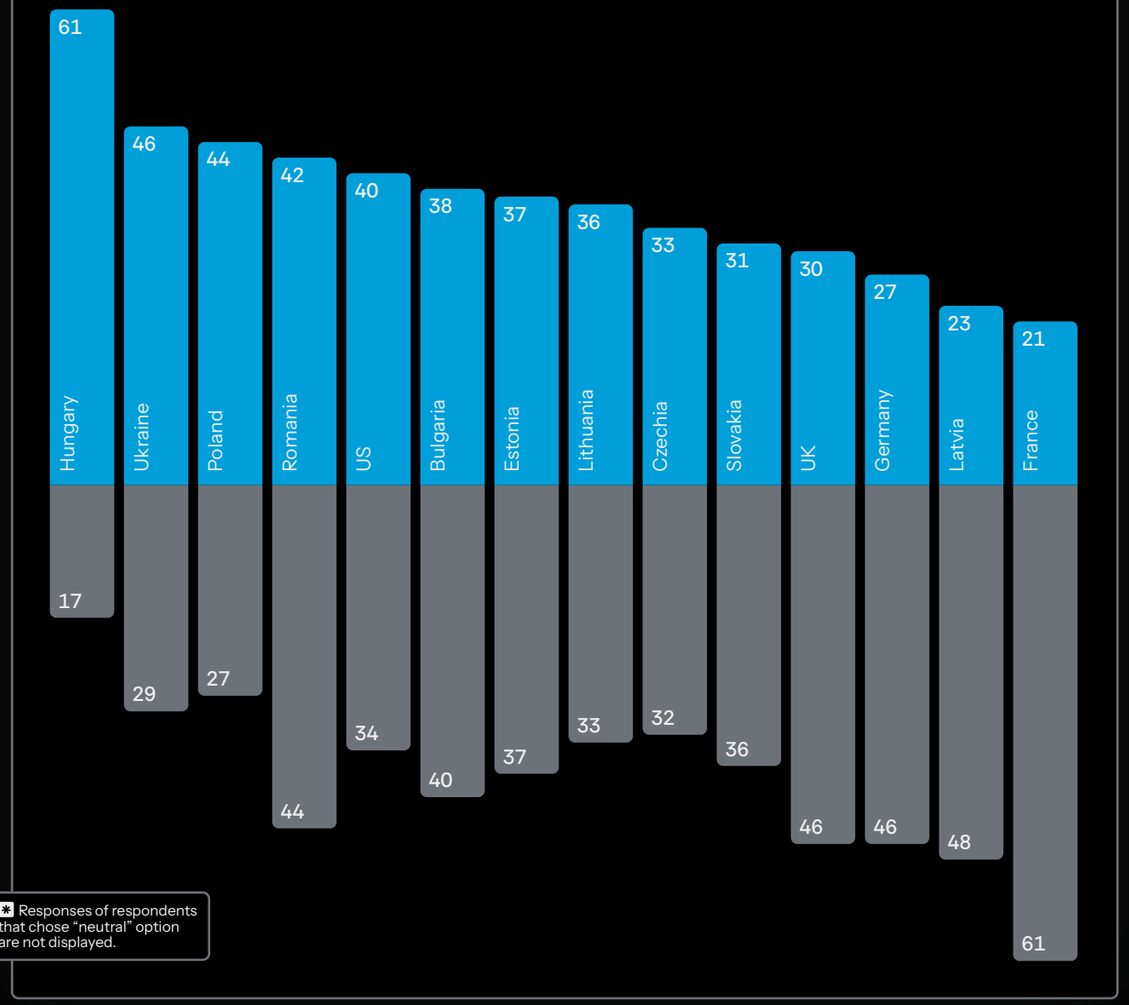
What do you believe are the three biggest threats to democracy, if any?

Average for all surveyed countries



Future looks mixed

Overall, are you optimistic or pessimistic about the future of democracy in your country? *



* Responses of respondents that chose "neutral" option are not displayed.

The assessment of the future draws the preceding findings together. In 13 of 14 countries – except for Hungary - optimism about the future of democracy does not reach a majority.

France stands out as the most pessimistic. This is consistent with the CEVIPOF 2026 Political Trust Barometer, in which 76% of French respondents said their democracy does not function well, a sentiment the Barometer linked to a sense that political leaders are corrupt and unresponsive. The same survey found that 43% agree that "nothing moves" in a democracy and would prefer "less democracy and more efficiency," while 36% support a strongman[113] leader. In our survey, 30% of French respondents agree that a totalitarian or autocratic system without regular and free elections would be good for their country (see following pages), a warning sign ahead of the 2027 presidential election.

Principle intact, trust eroded

Internal threats to democracy are reflected in how respondents view their own governments' abilities to deliver. A majority in 11 of 14 surveyed countries distrust their national government to ensure democracy functions effectively, and in 13 of 14, majorities express distrust in their national governments more broadly.

Respondents thus endorse the principles of democracy while many remain unconvinced by its outputs. That distrust may deepen the perception that the system serves the few, and feed further disengagement from democratic processes. The concern is consistent with International IDEA's finding that global scores for representation - the functioning of political parties and elections - fell to their worst level in over 20 years in 2024[114].

On average, 44% of respondents trust their national government to ensure that democracy continues to function effectively.

% Those who trust their national government to ensure democracy continues to function effectively vs. those who trust their national government in general.



Trust in processes

Majorities of respondents in 10 of 14 surveyed countries are confident that election results will be reported accurately and their elections are free and fair. Confidence is lowest in Bulgaria and Romania - the former after a cycle of parliamentary elections marred by allegations of vote-buying and fraud[115], the latter after the annulment of a 2024 election following a major information manipulation campaign on social media[116].

The data suggest that confidence in elections themselves largely holds; the scepticism lies more with the governments and actors that turn public will into political outcomes.

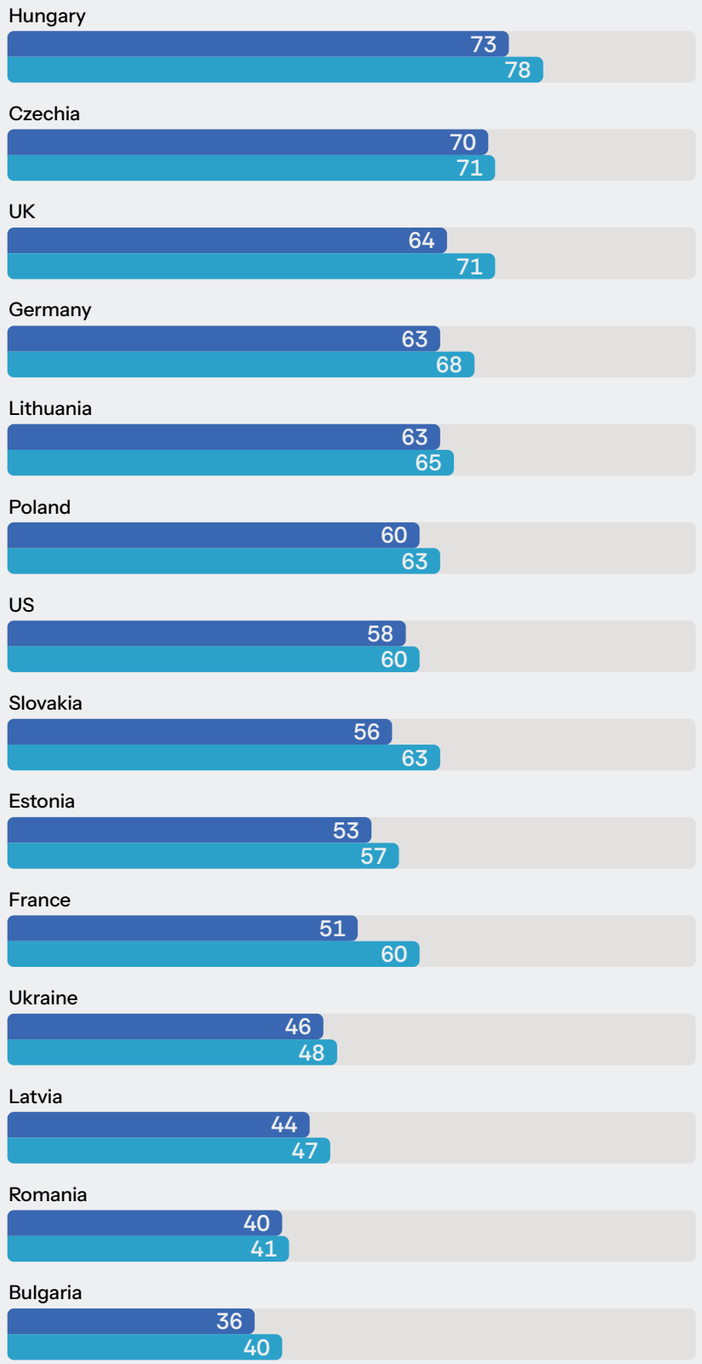
59%

on average are confident that election results are reported accurately.

% Confidence in fair elections

Those confident that elections in their country are free, fair and reflecting the will of the people.

Those confident that the results of elections in their country are reported accurately.



The values gap

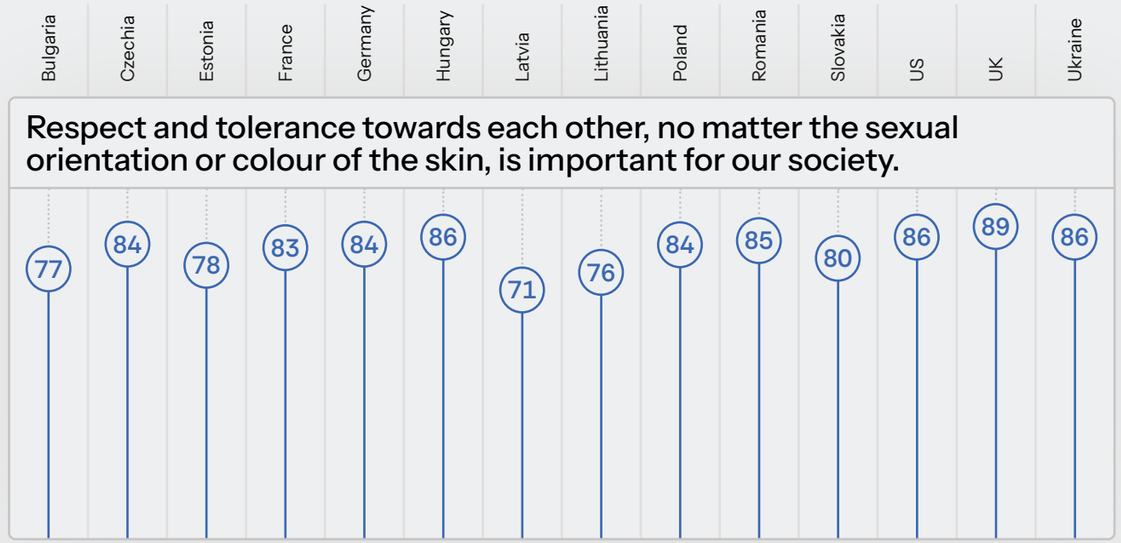
Support for democratic values is stronger in principle than in practice. A broad consensus holds around the abstract commitment - 82% agree that respect and tolerance for others, regardless of skin colour or sexual orientation, is essential for their society. Support weakens, however, on specific legal guarantees: only 58% back rights such as marriage for LGBTI people.

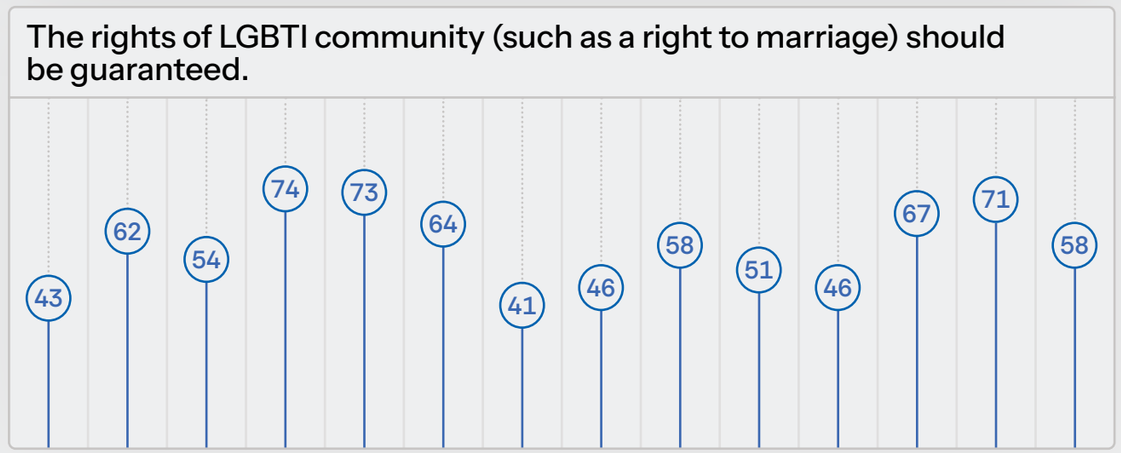
In more polarised societies, these divisions are sometimes used by governments to narrow civic space. In Bulgaria, recent legislation restricting "propaganda for non-traditional sexual orientation" in schools has limited civil society organisations' ability to provide health and human rights education[117]. The Court of Justice of the European Union recently found that Hungary had breached EU law by adopting measures that stigmatise and marginalise LGBTI people[118].

77%

of respondents in Bulgaria value respect and tolerance regardless of sexual orientation or skin colour, but only 43% support guaranteeing LGBTI rights.

% Those who agree with the following statements:

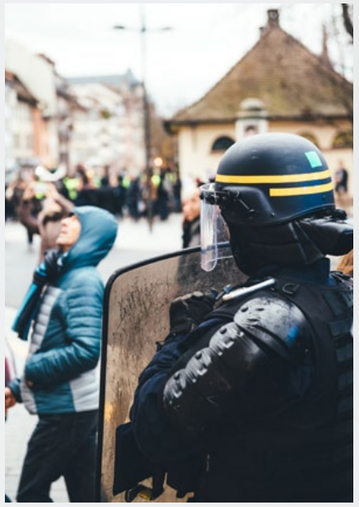




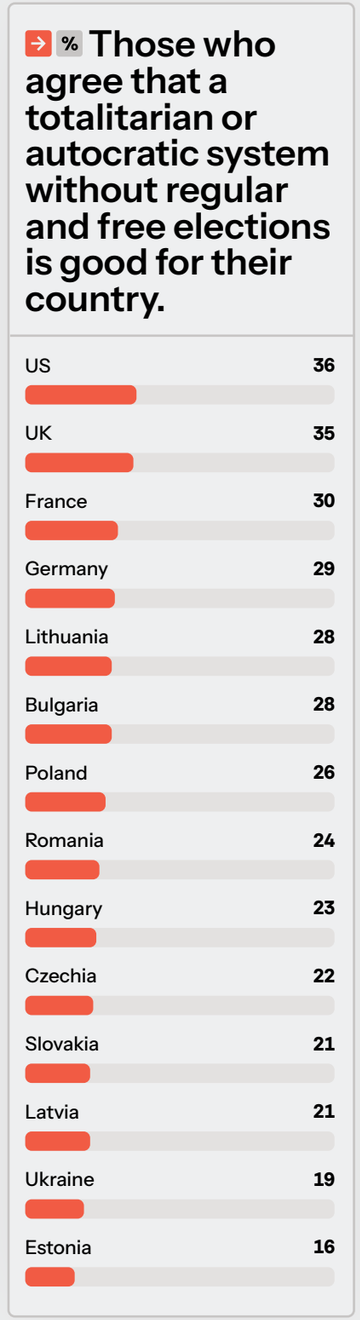
Democracy preferred, but not unchallenged

Globally, 74% of the population now lives under autocratic rule, and only a small share of 7% in liberal democracies[119]. Research suggests that dissatisfaction with how democracy performs can increase apathy and susceptibility to illiberal and authoritarian actors[120]. When asked to move beyond abstract support and choose whether "democracy is always preferable," 68% of respondents select it, while 32% are indifferent between systems or, in some cases, open to a non-democratic one.

When asked specifically about support for a totalitarian system, an East-West divide becomes prominent for the first time among the democracy-related questions. The notion that a totalitarian or autocratic system may be good for one's country is shared by the largest proportions of respondents in the US, UK, France and Germany. CEE countries show more caution, possibly reflecting their lived experience of totalitarian rule - yet even there, almost one in four respondents is open to it.



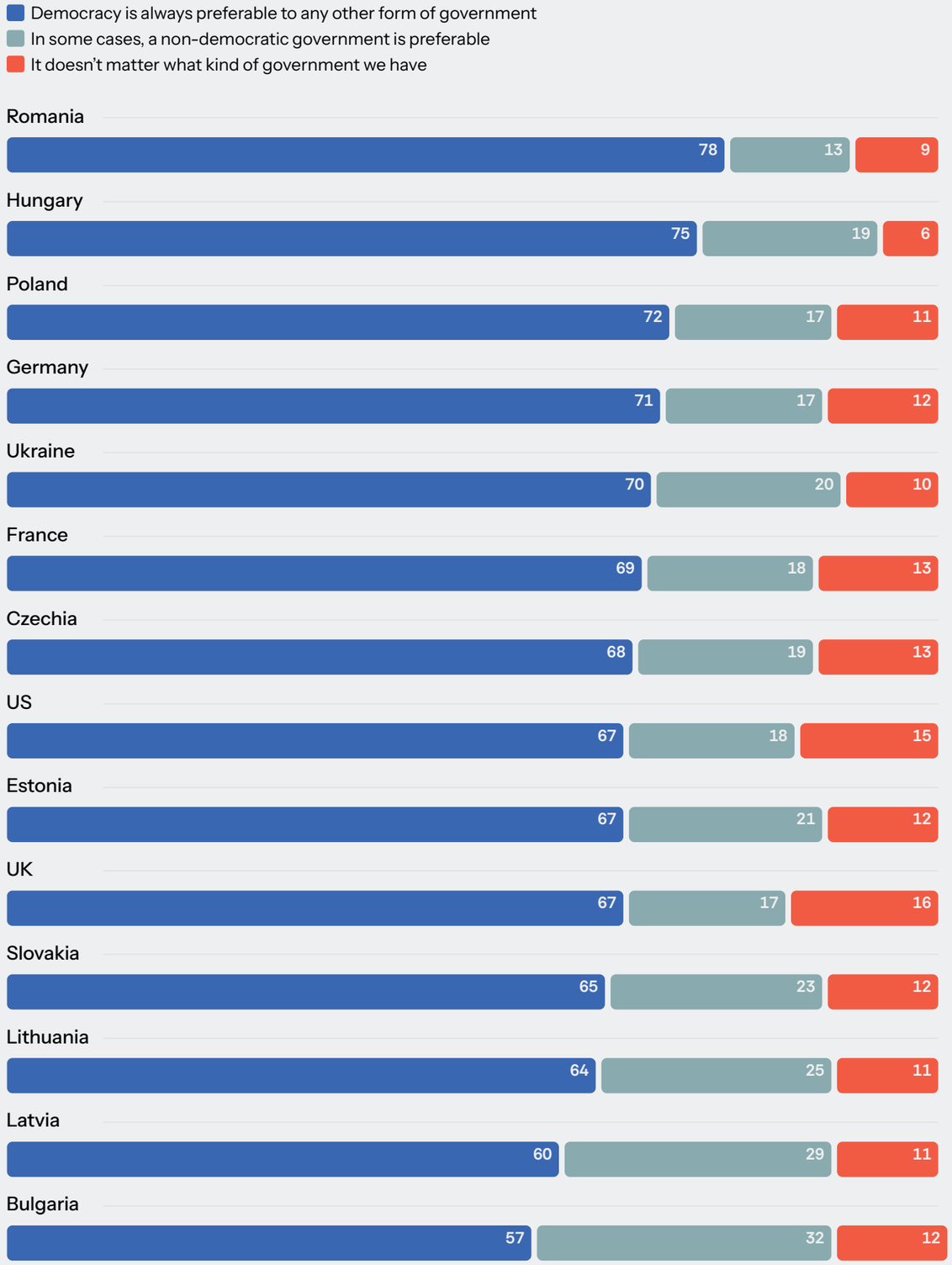
% Those who agree that a totalitarian or autocratic system without regular and free elections is good for their country.



36%

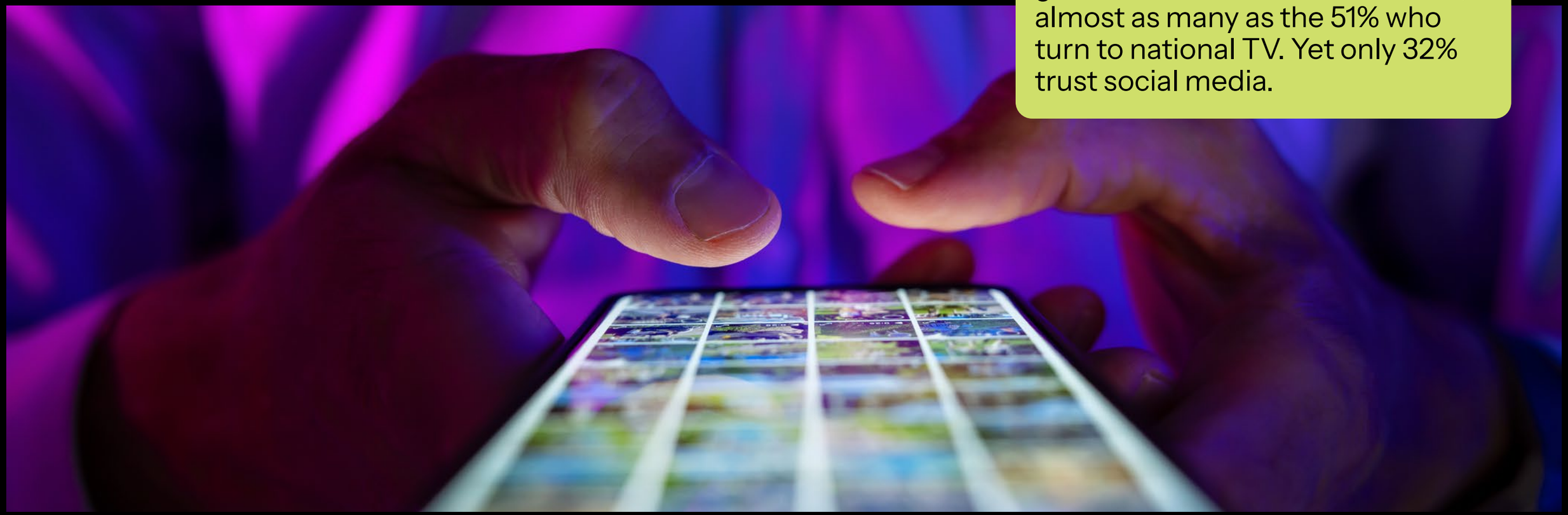
of US respondents think a totalitarian or autocratic system without regular and free elections is good for their country.

% Which of the following comes closest to your view:



Information Space

On average, 49% of respondents get their news from social media, almost as many as the 51% who turn to national TV. Yet only 32% trust social media.



The ways people consume information are undergoing profound transformation. National television remains the most common source across the surveyed countries, used by 51% of respondents, with social media close behind at 49%. This convergence reflects a broader platformisation of the information environment, in which social media, video networks, creators and, increasingly, AI are reshaping how people encounter and interpret news. Greater accessibility, however, does not translate automatically into trust - only 32% of respondents trust social media.

Respondents are also in two minds on platform regulation. While a majority of 63% agree it helps protect society from harmful content, a similar majority of 62% also see it as a form of censorship. The information space has thus become not only more fragmented but a central point of contention over trust, democratic resilience, and the limits of regulation.

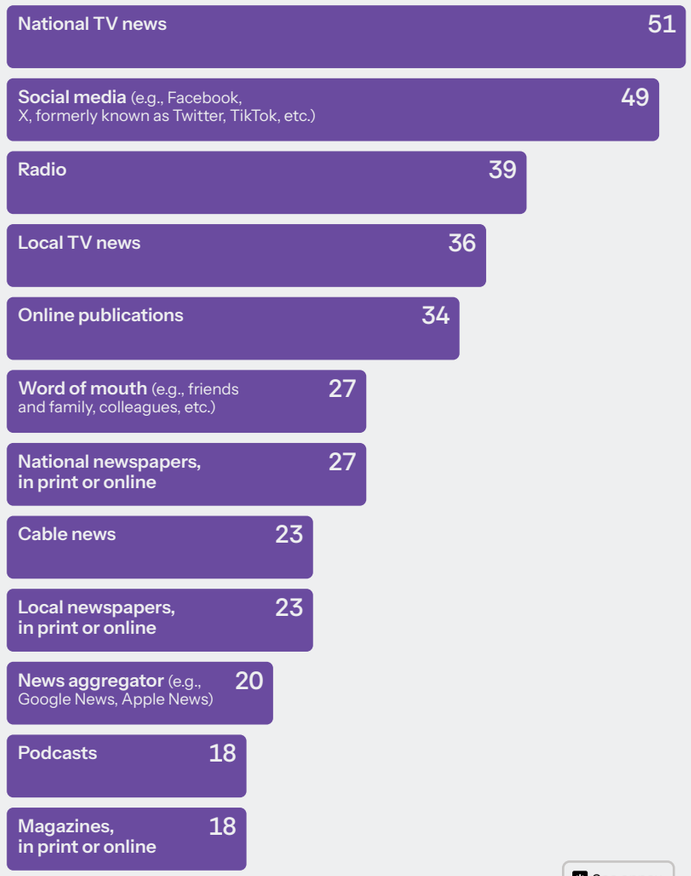
Navigating platformi-sation

National TV news remains the single most common source of information at 51%, and it is now neck-and-neck with social media at 49%. This is consistent with global findings: for the first time, social media have overtaken both TV and news organisations' own websites as the main gateways to information[121].

The fragility of democracy described in the previous chapter is also visible in the information environment. As traditional media hierarchies fragment, all 14 surveyed countries show a "platformisation" of news consumption. This is a global trend mapped by the Reuters Institute, marking a shift towards social media, video networks, and, more recently, AI[122]. Yet convenience often outweighs reliability - based on our findings, only 32% of respondents trust social media - creating an apparent gap between consumption behaviour and trust perceptions.

Which of the following sources, if any, do you typically get your news from?

Average for all surveyed countries

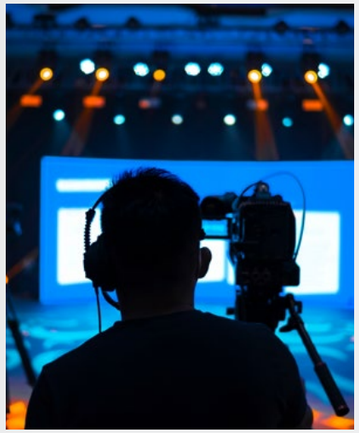


See annex for more data

Two outliers

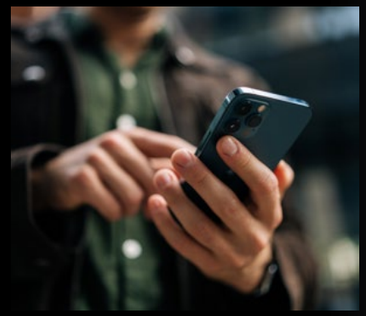
In Ukraine, reliance on social media for news has reached 77%, with 75% of respondents using Telegram daily. In wartime, Telegram has evolved from a messaging app into a core component of the national information infrastructure, serving as a primary news source, a channel for state communication, and a platform for civic coordination[123]. Public institutions and officials have integrated it into their communication strategies to reach citizens directly, and it has also become a key means of delivering air-raid alerts and humanitarian information[124]. At the same time, Telegram has been a potent vector for Russian information operations, not only in Ukraine[125].

At the other end sits France, which retains one of the most resilient traditional news cultures[126], with only 26% of respondents getting news from social platforms.



The rise of creators

Facebook remains the leading platform for news and entertainment. The clearer momentum, though, is behind video networks – and the rising number of news creators and influencers[127]. According to the Reuters Institute Digital News Report, 13% of respondents globally are satisfied with getting news from creators or influencers alone. In addition, creators appear to act as "interpreters" or "sense-makers" to information people first encounter through traditional outlets. The same report finds that 36% of those who dislike public-service news consider it "out of touch with ordinary people" – which may partly explain why creators, seen as closing the distance between the news and audience, are gaining ground[128].

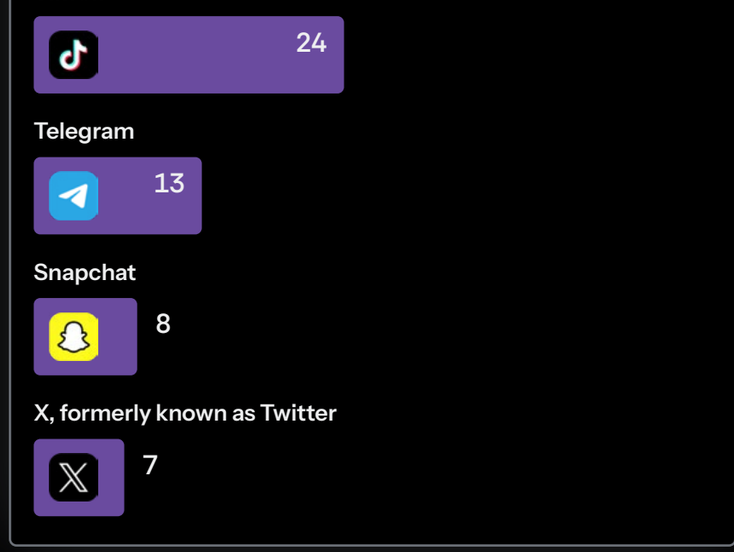


The shift to video networks and creators marks a change in how influence is distributed. While it brings directness and accessibility, it also carries risks for democratic cohesion. If parts of the electorate move from shared institutional realities towards fragmented, creator-led narratives, building broad public consensus on critical issues may become increasingly difficult[129]. The challenge for traditional newsrooms is to match the "authenticity" of creators without sacrificing the accuracy and trust that established journalism provides.

Those who use the following social media platforms daily

Average for all surveyed countries

See annex for more data



The regulatory dilemma

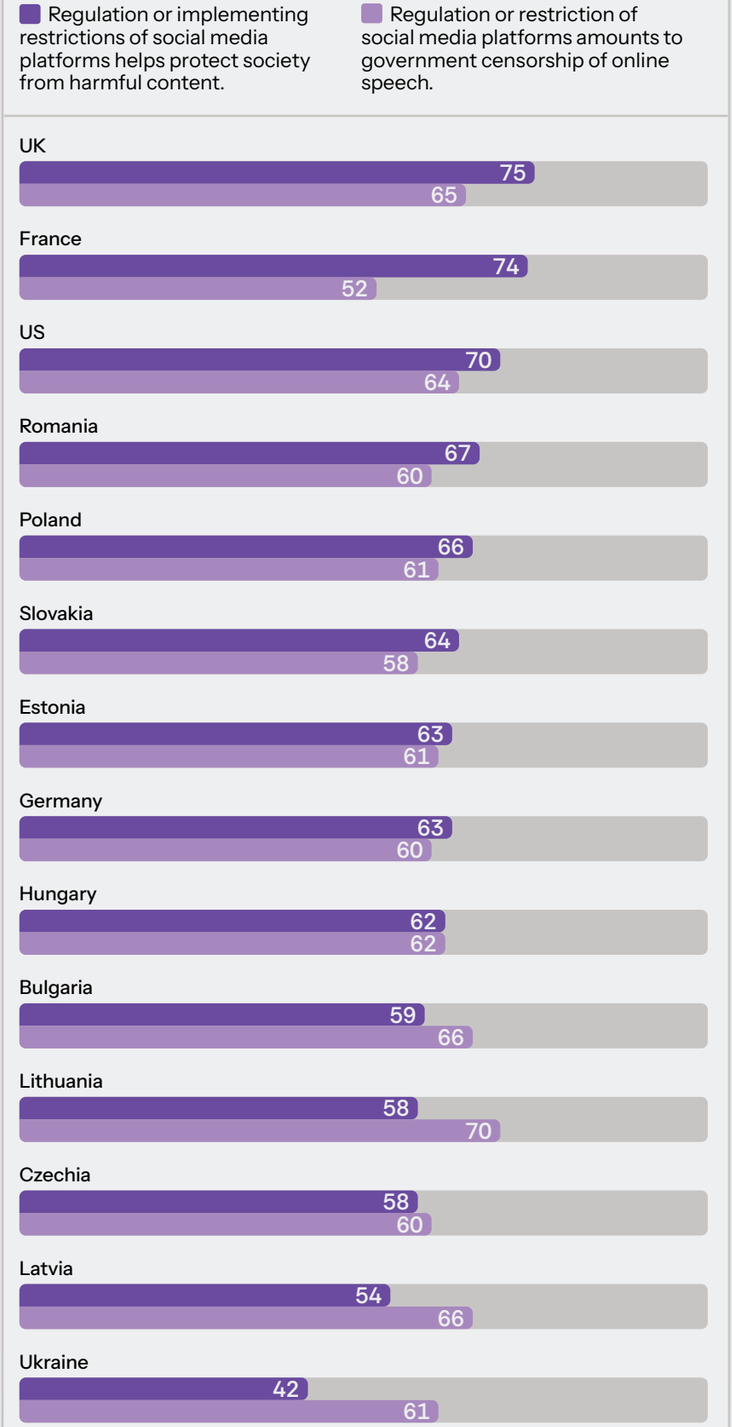
On average, 63% of respondents agree that regulating social media platforms helps protect society from harmful content, while simultaneously, 62% agree that such regulation amounts to government censorship of online speech. This is less contradictory than it appears: some respondents may accept regulation as a trade-off, tolerating a degree of restriction for the sake of protection. It may also reflect broader distrust of government (see more on p. 86-87), and a corresponding fear that regulation could be misused to capture the media or information space.

Ukraine is the principal exception. Only 42% agree that regulation protects society – by far the lowest figure, while 61% regard it as a form of censorship. Together, these findings indicate comparatively low confidence among Ukrainian respondents in the effectiveness of intervention by the state or the platforms.

63%

agree that regulating social media helps protect society from harmful content.

% Those who agree with the following statements:



Convergence on children

Support for restricting social media access for children under 16 is the clearest cross-country consensus in this section: on average, 74% of respondents back such a ban.

It coincides with a global policy debate. Following Australia's ban on social media for under-16s, in force since December 2025, most of the EU's member states were, as of May 2026, considering or drafting comparable national legislation, with France, Denmark, Spain, Poland, Slovenia and Italy furthest advanced[130]. In July 2026, the European Commission announced plans for an EU-wide age-limit regulation[131] and the UK has said it would introduce the ban from spring 2027[132].

% Those who agree that social media use should be restricted for children under a certain age; my country should ban social media for children under 16 to protect them.

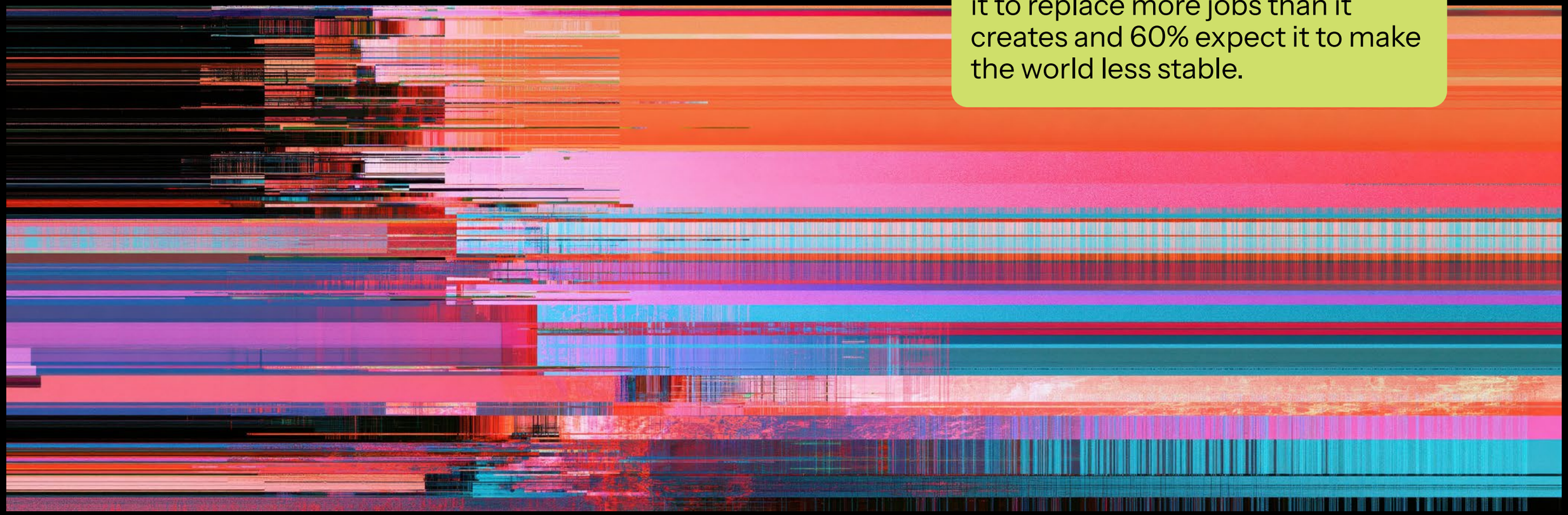
Whose rules apply?

A majority in every EU country surveyed perceives the US challenge to the EU's social media regulation negatively, consistent with a broader divergence between European and US approaches to free speech and platform regulation. The finding follows a year of escalating pressure: in December 2025 the Commission issued its first Digital Services Act fine, penalising X €120 million over transparency failures[133]; Washington responded with visa bans on five Europeans involved in drafting the rules[134], including former Commissioner Thierry Breton; and by April 2026 Brussels had opened a "digital dialogue" with Washington while maintaining it would not scrap rules that fall most heavily on US companies, since those companies run the platforms most used in Europe[135].

% Those who view the US challenging European rules on online content and social media platforms negatively.

Artificial Intelligence

AI is accepted but not embraced. 61% view it favourably, yet only 16% are excited about it. 77% expect it to replace more jobs than it creates and 60% expect it to make the world less stable.



AI has moved from experimentation into everyday life, embedded in how people work, search and consume information — which makes public attitudes towards it newly consequential. Those attitudes turn out to be strikingly divided against themselves. Familiarity is now widespread, ranging from 56% in Germany to 81% in Bulgaria, and in all but one country most respondents hold a favourable opinion of AI. Yet acceptance of the technology does not extend to its consequences. 77% expect AI to replace more jobs than it creates, and 60% expect it to make the world less stable.

The chapter traces this tension across four dimensions — familiarity and favourability, everyday sentiment, employment, and stability — and finds the same fault lines throughout. Enthusiasm is rare everywhere; cautious optimism is the norm; and anxiety concentrates in the West, where greater familiarity with AI coincides with greater unease rather than greater confidence. Ukraine runs consistently against the pattern, the least anxious society surveyed on nearly every measure — a position that appears to owe much to AI's visible role in its defence.

Familiar, but not always favourable

Familiarity with AI tends to run higher in CEE than in the West and it correlates with favourability: the countries most familiar with AI are also among the most positive about it.

The UK and the US show the opposite pattern. Familiarity is relatively high, but it does not translate into enthusiasm. In the West, greater familiarity with AI appears to coincide with greater caution rather than greater confidence. Ipsos polling from April 2026 likewise places both countries among the more AI-sceptical ones, particularly over the technology's potential impact on jobs and the volume of false information online[136].

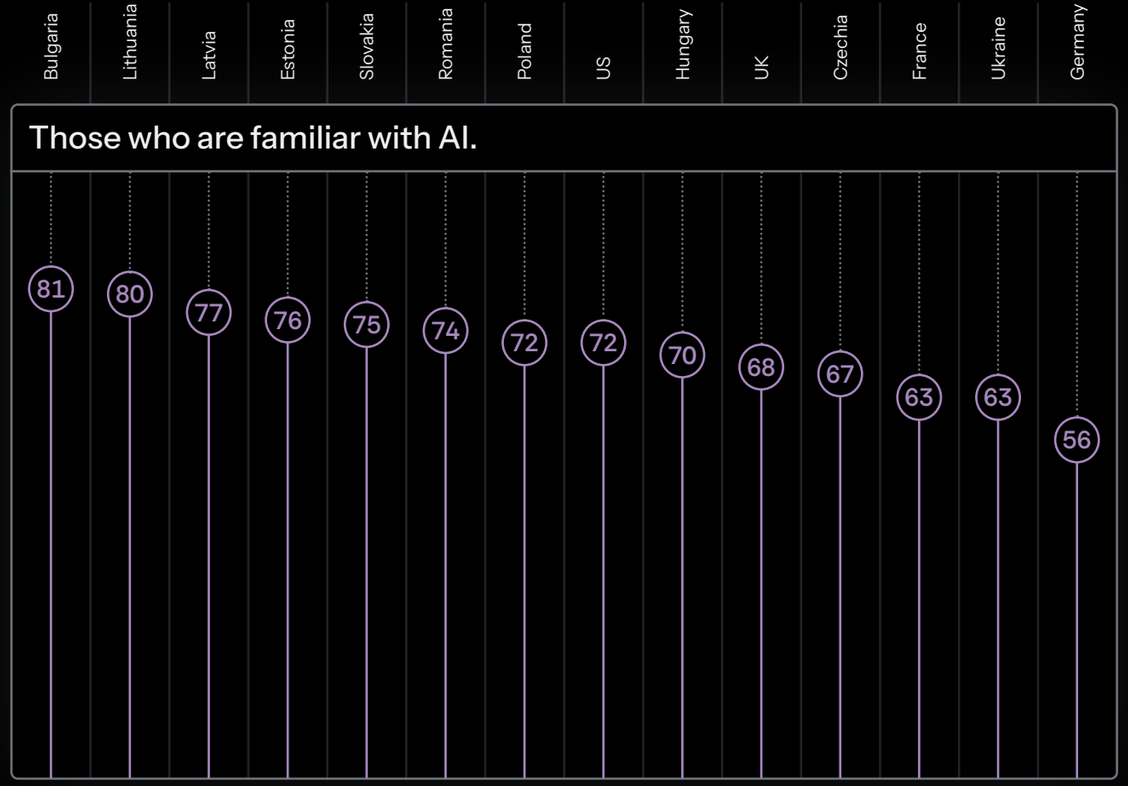
Ukraine is the clearest exception. Despite only mid-range familiarity, favourability reaches 68%, among the highest in the region and ahead of every Western European country surveyed. This fits a pattern observed throughout this chapter: the society facing acute security pressures tends to view new technologies more through the lens of resilience and capability than of disruption. Ukraine has used AI-powered technologies for target detection[137], improving drone strike accuracy[138] or countering influence operations[139].

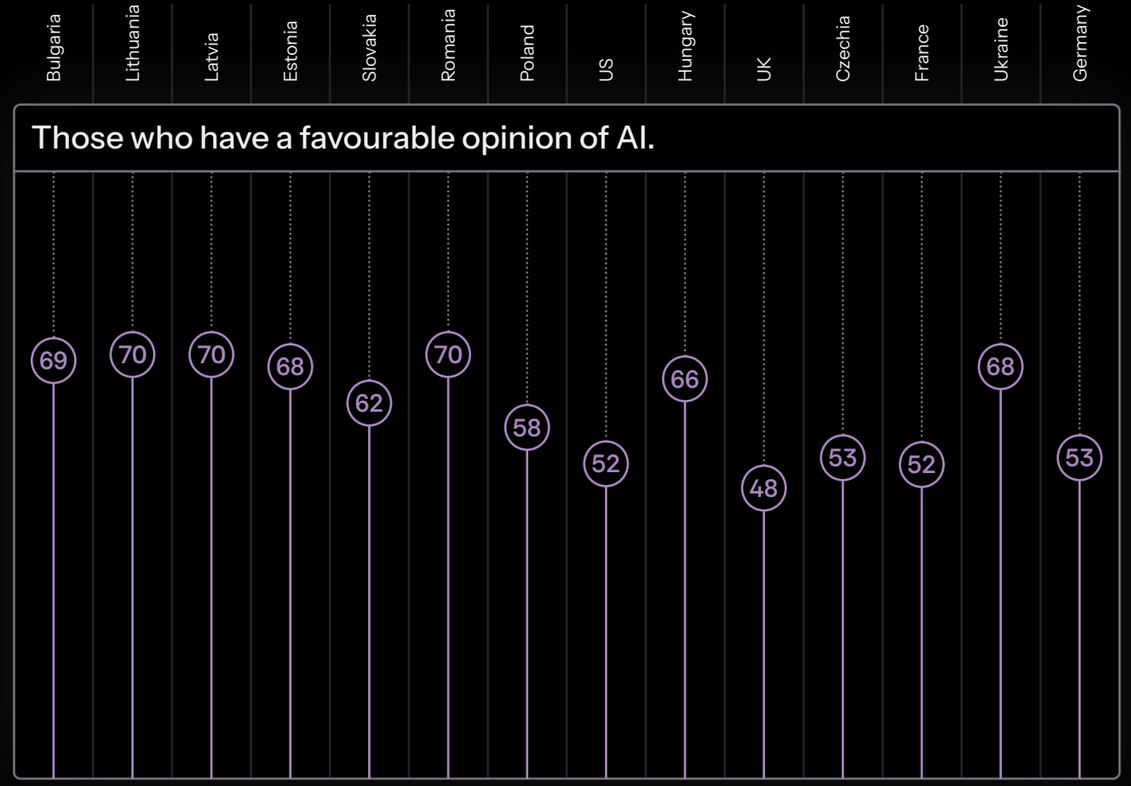


71%

of respondents are familiar with AI, while 61% view it favourably.

Public perceptions of AI



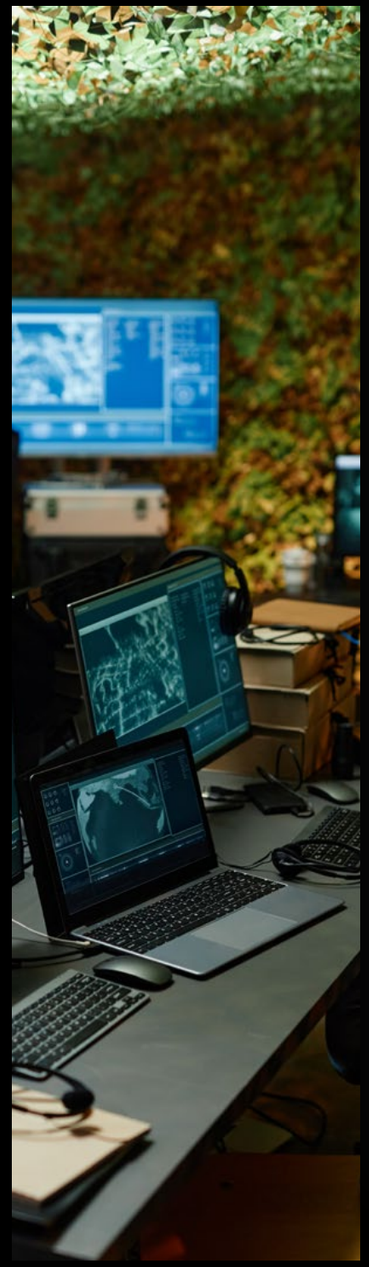


Cautiously optimistic, rarely excited

Positive sentiment towards AI is common but rarely intense: most respondents fall into cautious optimism rather than outright excitement, which few express in any country. Concern that AI is moving too fast remains a minority view, though it rises steadily towards the West, where cautious optimism is weakest.

The same divide shapes expectations of AI's wider effects. Across CEE, clear majorities expect AI to do more good than harm for society; in the West that confidence thins. The two questions track each other closely — the countries most cautiously optimistic in daily life are also the most convinced AI will benefit society, while the more anxious Western publics are split on both.

Ukraine again stands out most clearly. Respondents there are both the most optimistic about AI's role in daily life and the most likely to expect its benefits to outweigh its risks — a striking position for a country at war. As noted earlier, AI has become visibly embedded in Ukraine's defence, which may help explain why respondents seem to see it first as an instrument of resilience rather than a source of disruption, unlike societies weighing it mainly against risks to jobs or stability.

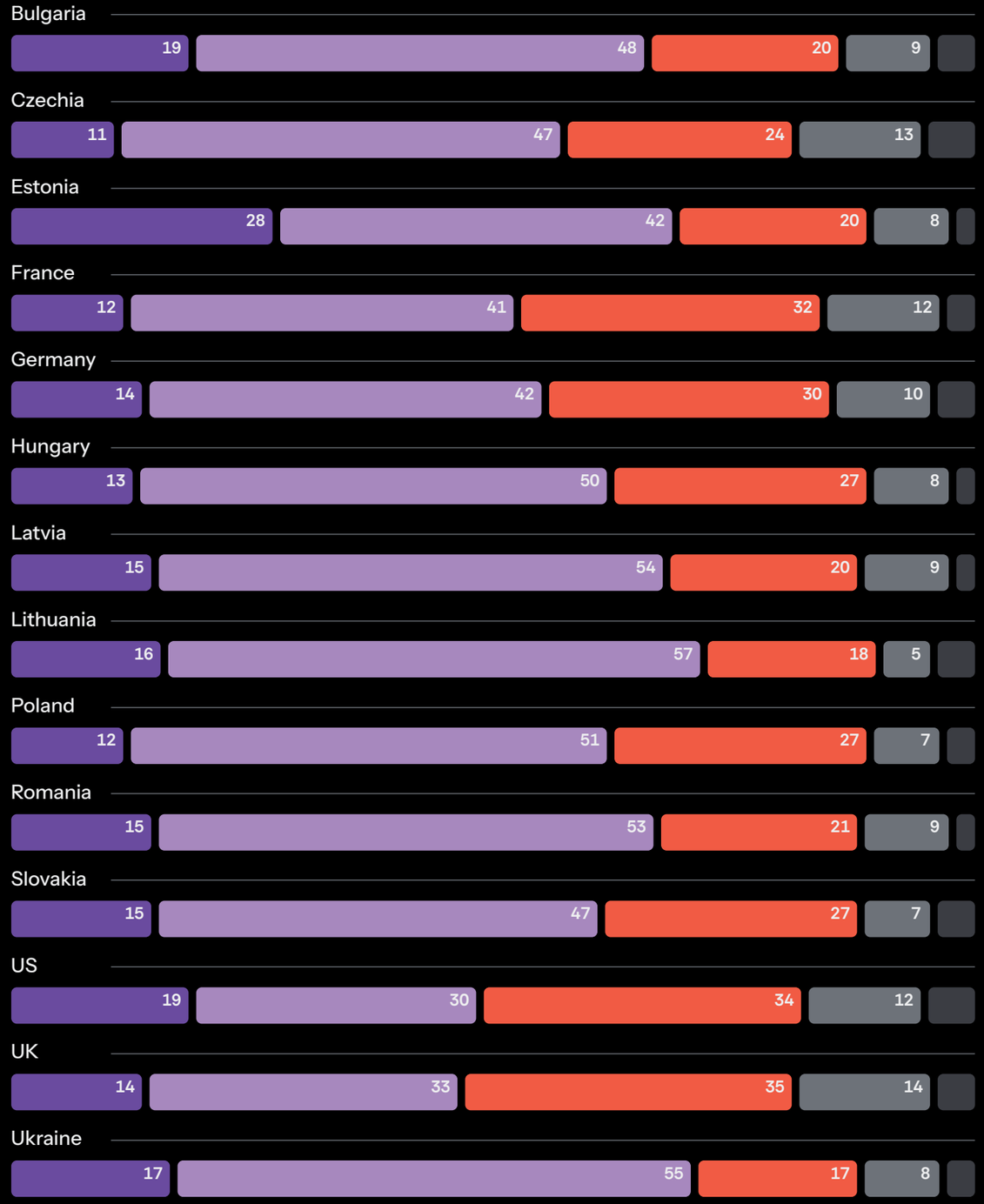


→ % Those who believe AI will do more to help than harm society.



→ % Which of the following best describes how you feel about AI in your daily life?*

* The remaining respondents chose "Not sure" option.

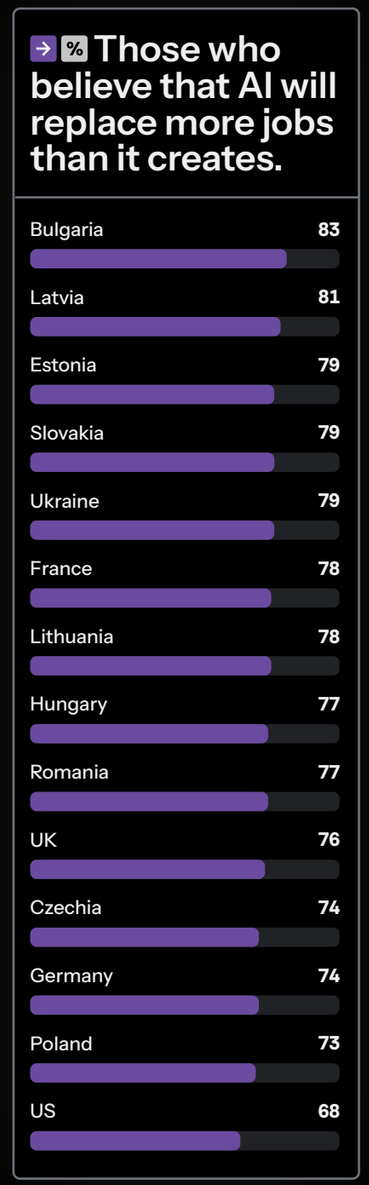


Jobs on the line

A majority in every surveyed country expects AI to replace more jobs than it creates. This is a notably more pessimistic outlook than the one employers themselves report. The World Economic Forum's Future of Jobs Report 2025, drawing on more than 1,000 employers across 55 economies, projects a net positive employment effect from AI and information-processing technologies by 2030, with roughly 11 million jobs created against 9 million lost[140].

The US is the only country where this pessimism meaningfully softens. One possible explanation is that, as home to the world's frontier AI developers, US respondents may be more inclined to see these systems as tools that augment human skills rather than replace them.

→ % Those who believe that AI will replace more jobs than it creates.



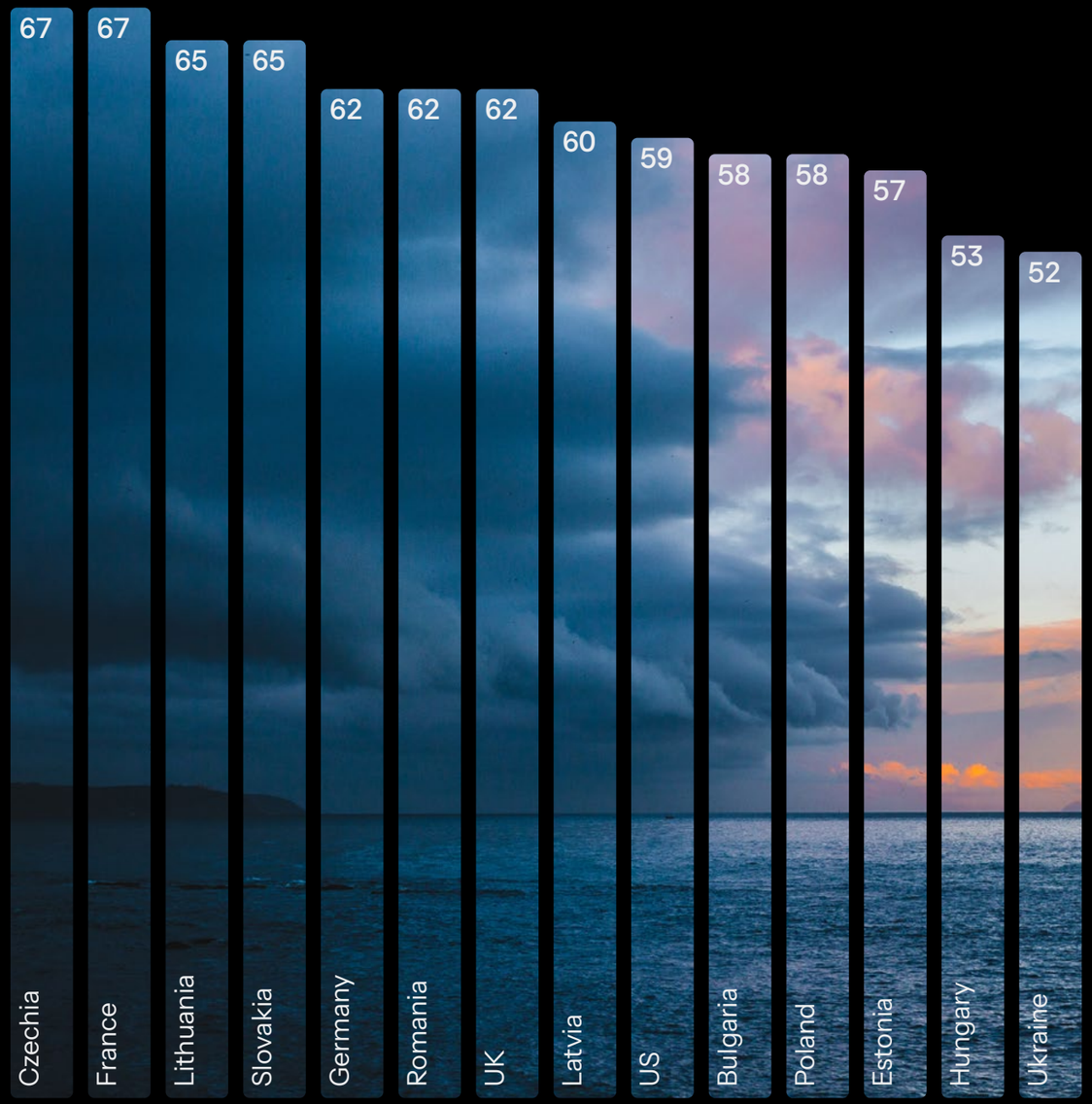


77%

on average, believe AI will replace more jobs than it creates.

A less stable world?

→ % Those who believe that AI will lead to less global stability.



Majorities in every surveyed country expect AI to make the world less stable. Unlike familiarity and favourability, this concern does not follow a clear East-West line: Czechia, Lithuania and Slovakia sit alongside France at the top, while the US falls in the middle of the range. Even where Europeans are optimistic about AI in daily life, few appear to believe it will make international affairs safer. Ukraine fits the pattern seen throughout this chapter: a society that has watched AI strengthen its own defence seems less inclined to see the technology as a source of global disorder.

% Which of the following sources, if any, do you typically get your news from?

8 — 77

	National TV news	Social media *(e.g., Facebook, X (Twitter), TikTok, etc.)*	Radio	Local TV news	Online publications	Word of mouth *(e.g., friends and family, colleagues, etc.)*	National newspapers, in print or online	Cable news	Local newspapers, in print or online	News aggregator *(e.g., Google News, Apple News)*	Podcasts	Magazines, in print or online
Romania	68	49	42	42	40	27	32	43	23	28	24	19
Bulgaria	62	55	36	36	55	24	25	20	17	19	22	15
UK	58	43	38	44	18	32	35	10	23	22	13	12
Estonia	55	55	50	39	39	27	44	14	38	18	15	29
Lithuania	54	56	43	34	45	28	27	22	26	20	23	19
Czechia	52	42	38	34	21	27	37	14	23	16	18	19
Germany	51	32	45	43	41	37	23	37	33	21	13	24
Poland	51	45	45	34	37	21	27	37	21	16	20	24
Hungary	49	57	35	24	30	27	24	18	19	18	24	13
France	48	26	38	35	19	23	31	37	27	11	11	16
Slovakia	48	46	48	33	23	23	22	14	18	13	21	19
US	47	44	26	49	21	26	21	27	26	26	19	12
Latvia	41	60	43	37	35	26	22	16	21	23	11	15
Ukraine	32	77	16	22	56	24	8	20	9	25	13	9

% Those who use the following social media platforms daily.

1 — 75

	Facebook	YouTube	WhatsApp	Instagram	TikTok	Telegram	Snapchat	X, formerly known as Twitter
Hungary	69	37	7	19	24	7	5	4
Lithuania	66	46	12	24	23	10	10	2
Bulgaria	65	48	12	25	22	10	3	5
Romania	62	46	67	27	37	7	7	7
Slovakia	56	34	27	28	14	7	4	3
Poland	55	38	24	24	21	6	7	11
Estonia	52	42	16	24	21	13	11	7
Czechia	50	31	36	24	13	5	5	5
Latvia	47	41	65	23	28	20	8	5
UK	46	36	52	28	27	5	14	14
US	45	45	16	31	28	9	15	17
Ukraine	43	66	19	33	36	75	1	5
France	40	26	32	28	17	4	17	9
Germany	32	29	66	29	21	7	9	5

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GLOBSEC Trends

This report is part of the GLOBSEC Trends series, a yearly publication examining public attitudes in Central and Eastern Europe and, since 2026, across the wider transatlantic space.

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→ Methodology

The findings of this report are based on a quantitative public opinion survey carried out between 11 and 19 May 2026 in fourteen countries: Bulgaria, Czechia, Estonia, France, Germany, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Ukraine, the United Kingdom and the United States. The survey was conducted by HarrisX through online panels on a sample of 1,010 respondents per country, with the exception of Estonia, where 600 respondents were surveyed, giving 13,730 respondents altogether. The margin of error is +/- 3.1 percentage points at a country level and +/- 4.0 percentage points in Estonia. In all countries, the profiles of the respondents were representative of the country according to gender, age, education, place of residence and size of settlement.

The 2026 edition of GLOBSEC Trends includes France, Germany, Ukraine, the United Kingdom, and the United States for the first time. In the report, these countries are at times referred to collectively as "Western countries" or "the West". Some questions were not asked in all countries, for example questions on EU membership benefits in non-EU countries or on whether the United States represents a threat in the United States itself. Charts therefore include only the countries in which the respective question was asked.

In this report, Central and Eastern Europe (CEE) generally refers to Bulgaria, Czechia, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, and Ukraine.

Previous editions used computer-assisted telephone interviewing (CATI) for data collection. Year-on-year comparability is therefore limited, and country-level comparisons with previous editions are not presented. Averages in the report are unweighted means of country-level results, meaning that each country has equal weight regardless of population size or sample size.

For the purposes of graphical data visualisation, the results were rounded to full numbers; thus, some values depicted in graphs might not add up to 100%. To improve the readers' experience, the responses in closed questions with a scale were generalised. For example, a question with the options definitely agree / rather agree / rather disagree / definitely disagree were merged to agree / disagree. All numbers shown in the report are in percentages. The questions were consulted with sociologists.

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