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CENTRAL EASTERN EUROPE

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The Pulse of Europe 2025

Between Fear, Power, and Hope

Warsaw | 02/12/2025

The Pulse of Europe 2025

Between Fear, Power, and Hope



Bruno Jeanbart
VP of OpinionWay
& DGM of Polling Europe

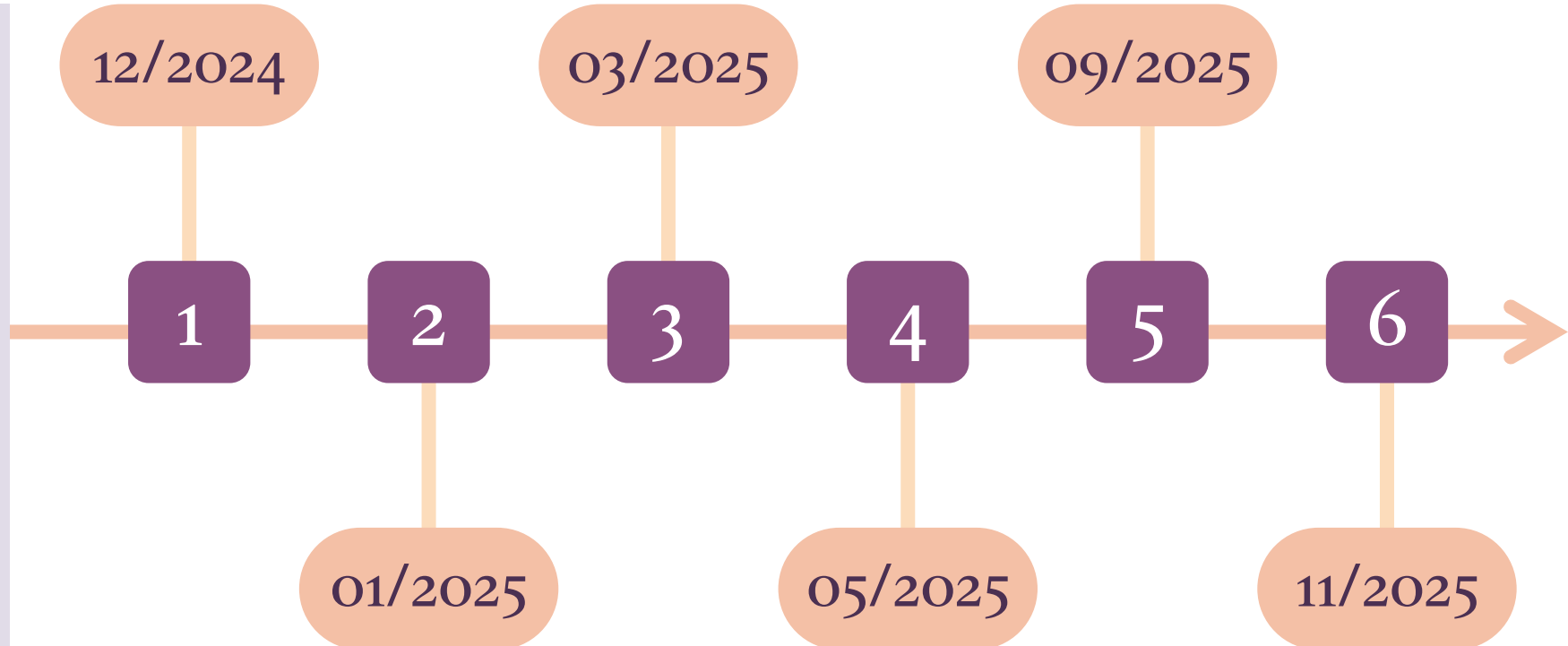


Nicolas Curtelin
GM OpinionWay CEE

Warsaw | 02/12/2025



A look back at the lessons learned from the last six waves of EuroScope



5,000+ European citizens interviewed each wave!



Act I – A Continent on Edge



Act I - A Continent on Edge

Hybrid War - Recent intrusions in the NATO's airspace

12/2024

01/2025

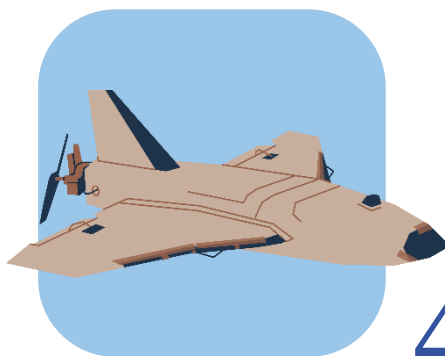
03/2025

05/2025

09/2025

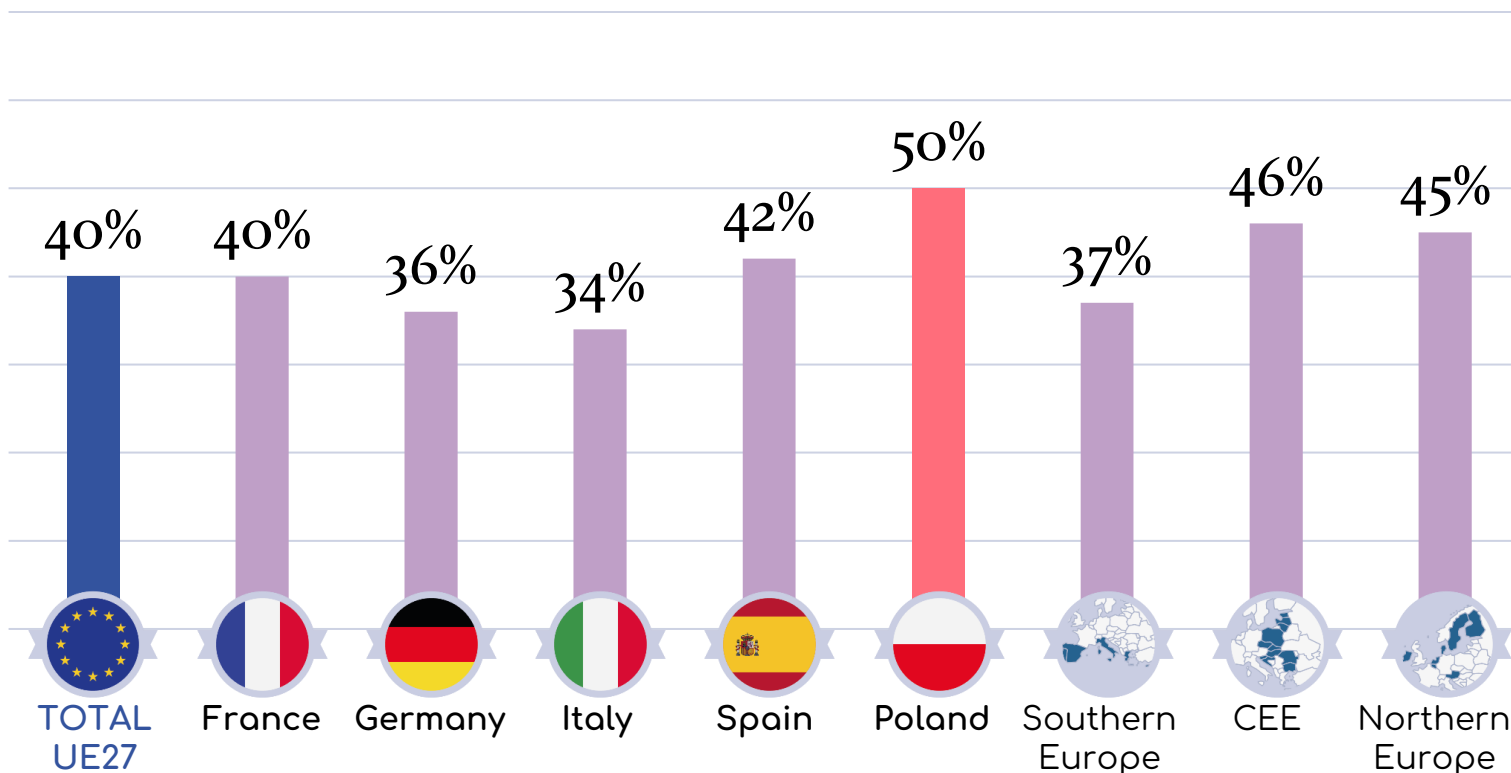
11/2025

Q. If there were drone intrusions in your country over airports and military sites, do you think your country would be able to stop this disruption?



Only
40%

Of the EU citizens think their country would be able to stop this disruption





Act I – A Continent on Edge

Hybrid War – Permeability to misinformation

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. If there were drone intrusions in your country over airports and military sites, do you think your country would be able to stop this disruption?

% AGREE

	 Total EU27	 Poland
Migrants and refugees are causing chaos and violence across European countries	55%	71%
Migrants in Europe commit widespread crimes that authorities hide from the public	46%	64%
EU sanctions against Russia are destroying Europe's economy more than Russia	44%	36%
The European Union bans curved bananas and imposes absurd regulations on everyday life	38%	55%
There is a secret plan to "Islamize" Europe, displacing European culture and Western values	35%	34%
Ukraine and NATO dragged Russia into the war by bringing military installations closer to its borders	33%	24%
Ukrainian forces deliberately shell nuclear plants like Zaporizhzhia to provoke disaster	30%	31%
Western intelligence agencies are behind sabotage and cyberattacks blamed on Russia	30%	28%
The drone invasion in Poland (or on the eastern flank of NATO) was orchestrated by Ukraine	27%	29%

		
Agree with at least 1 assumption	77%	85%
Average nr of assumptions / 9	3.4	3.7
Agree with a majority of assumptions (5 or more)	33%	35%
Agree with all 9 assumptions	8%	7%



Act I – A Continent on Edge

Hybrid War – Permeability to misinformation

12/2024

01/2025

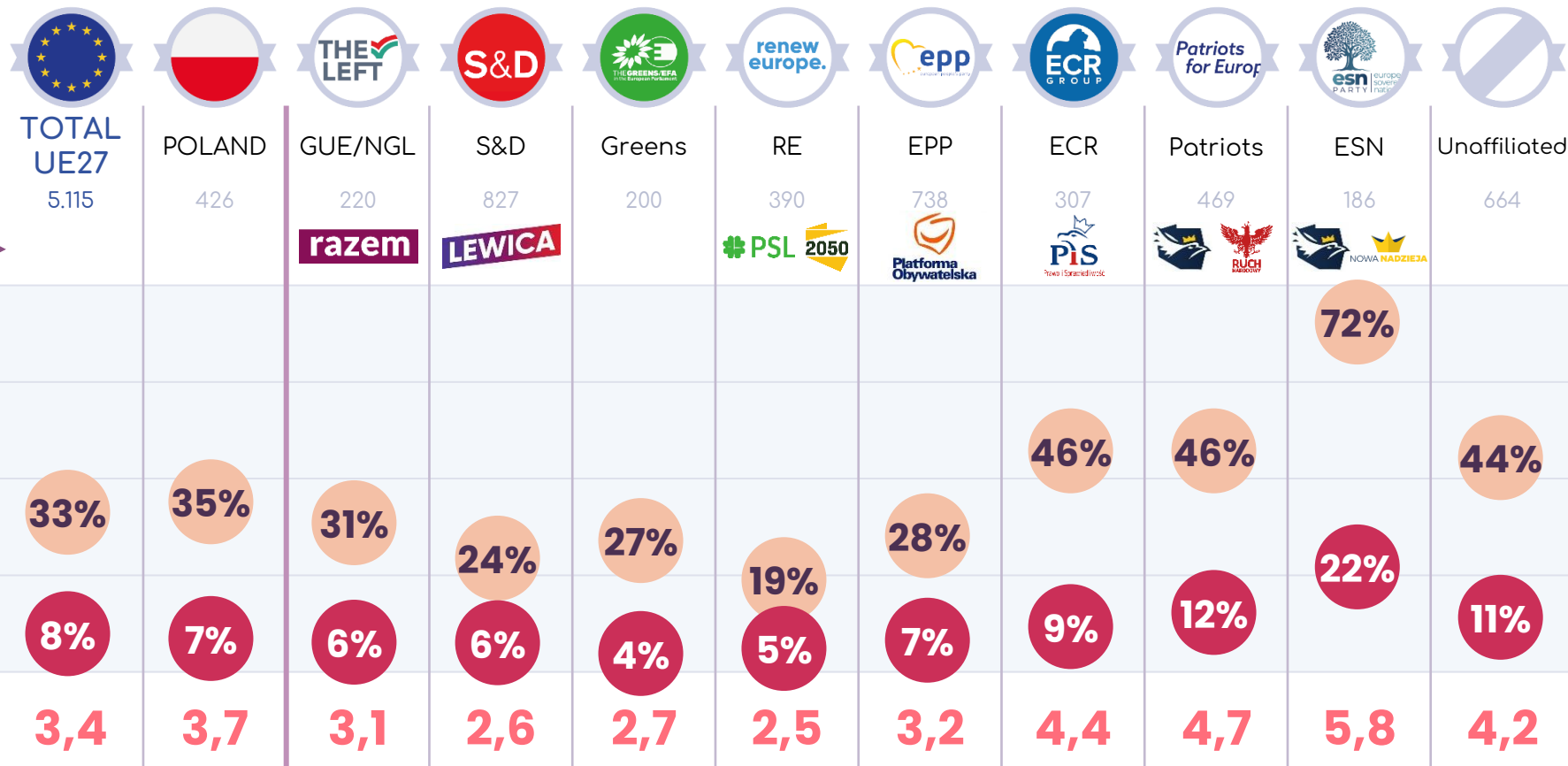
03/2025

05/2025

09/2025

11/2025

Q. If there were drone intrusions in your country over airports and military sites, do you think your country would be able to stop this disruption?



What agreement according to the vote at the last EU election?

Agree with a majority of assumptions (5 or more)

Agree with all 9 assumptions

Average nr of assumptions / 9



Act I - A Continent on Edge

If you want the peace, prepare the war!

12/2024

01/2025

03/2025

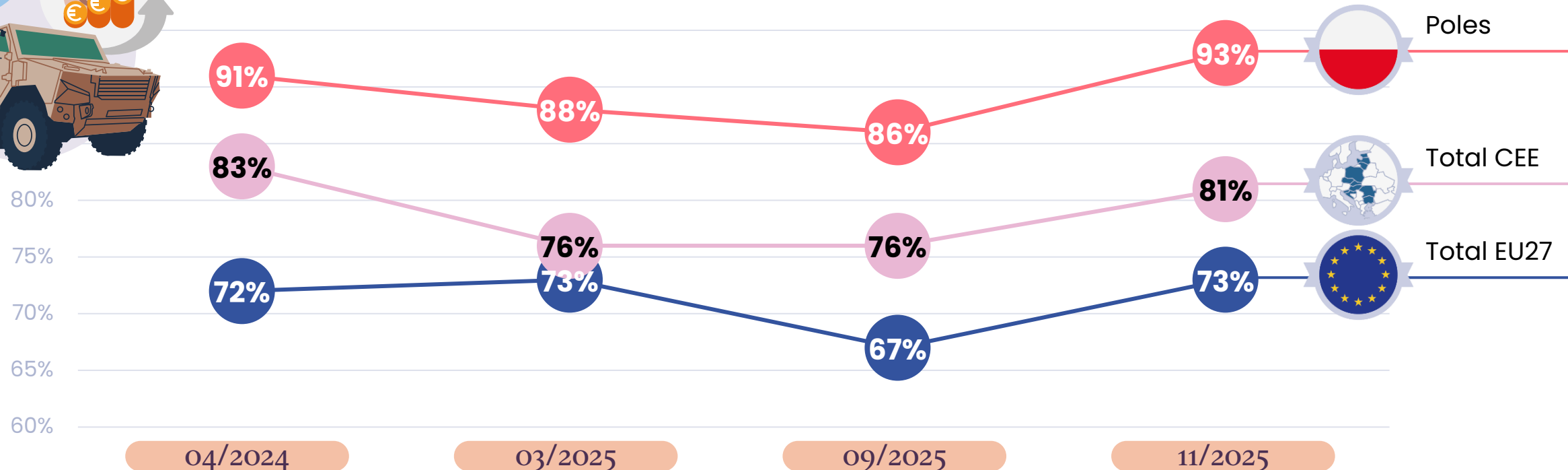
05/2025

09/2025

11/2025

Q. If the United States would decide to reduce the military support for Europe, do you think that your country should increase the military expenditure?
Q. Considering the international situation, do you think that the EU member states, should increase investments in defense?

% The EU member states should increase investments in defense





Act I – A Continent on Edge

Despite a consensus on investments, confidence in Europe's readiness is limited

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Do you think Europe is currently prepared, in terms of military strength, for a prolonged military conflict with a third country?
Q. Do you think that the EU is currently acting effectively on Europe's defense policies?

52% THE EU IS NOT PREPARED

Across the EU, **52%** of respondents said Europe was *not prepared* for a prolonged military conflict, including **26%** who said "*not at all.*"

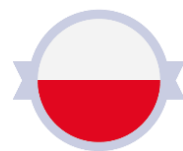


Similar feelings in Poland: **51%** said *not prepared*, **20%** *not at all.*



53% THE EU IS NOT ACTING EFFECTIVELY

In November, **53%** think that the EU is currently not acting effectively on Europe's defense policies



Poles are a bit less severe: **50%** said *not effectively*



Act I - A Continent on Edge

Europeans call for action, but governance questions persist

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Do you believe that investments in defense in Europe should be...

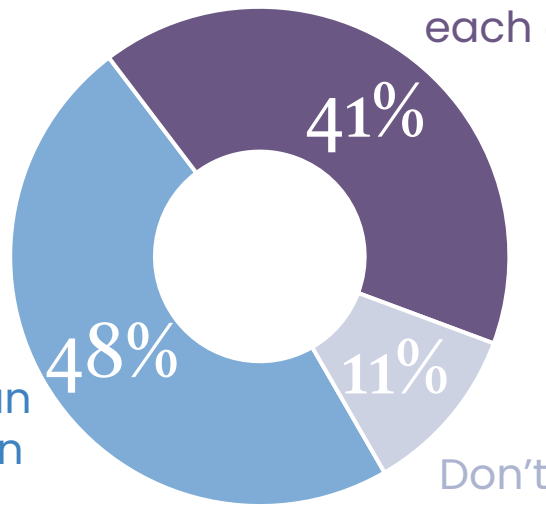
Who should coordinate defense investments?



Total EU27

managed by
each country

the European
Commission



Don't
know

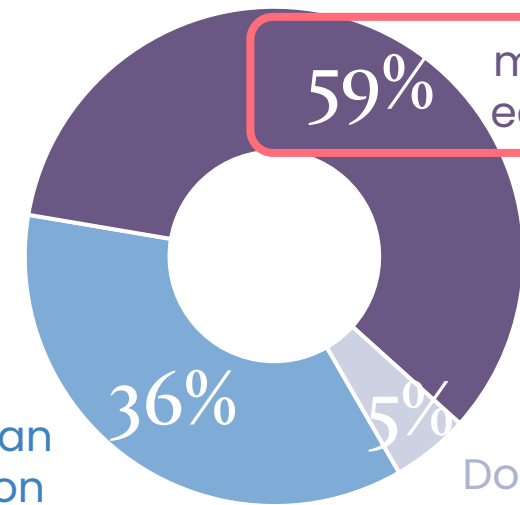


Poles

59%

managed by
each country

the European
Commission



Don't know



Act I – A Continent on Edge

What role for the EU to end the conflict?

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Considering the current situation of the war between Russia and Ukraine, do you believe that the European Union should aim at freeze the conflict/defeat Russia... ? / Q. Do you agree or disagree with European countries sending troops into Ukraine after the end of the war to ensure peacekeeping? / Q. Do you think EU should confiscate immobilized Russian assets and use them to support Ukraine?

Negotiate with Russia

December 2024: **39%** of Europeans said the EU should *“freeze the conflict to begin long-term negotiations”*,

while **24%** preferred that the EU should aim at *“defeating the Russian forces and make them withdraw from all Ukrainian territory.”*

Deploy EU troops

In March, **45%** of EU citizens would support the *deployment of EU troops for peacekeeping in Ukraine once the conflict ends*,



The support falls to **36%** in Central and Eastern Europe — and **39% in Poland**, region most directly exposed to the consequences.

Confiscate Russian assets

In November, **45%** are calling the EU to confiscate immobilized Russian assets and use them to support Ukraine



59% of Poles agree



Act II – The Economic Frontlines

The security environment has changed,
so has the economic one



Act II – The Economic Frontlines

The U.S. tariff saga shook global trade in 2025

12/2024

01/2025

03/2025

05/2025

09/2025

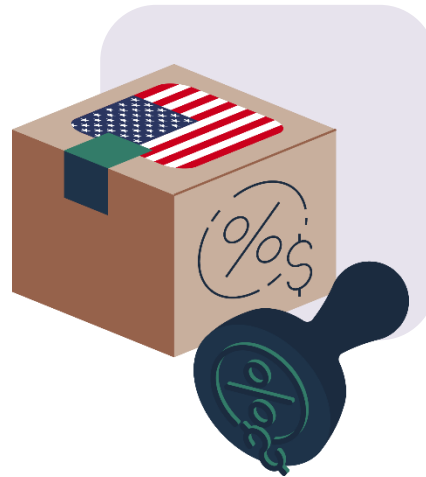
11/2025

Q. Regarding the tariffs imposed by Trump on European products, do you think the European Union should impose the same kind of tariffs on American products, even if this would lead to an increase in their prices? / Q. The Digital Service Act is a European Union regulation designed to create a safer and fairer online environment by preventing illegal and harmful activities online and the spread of disinformation. According to you, the EU should be willing to relax these rules in exchange for lower tariffs by USA?

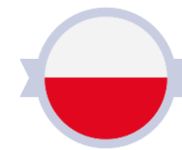
The global trade system has entered a more confrontational phase, and Europeans are adjusting to this new reality.

When the United States reintroduced tariffs on European products,

67% of EU citizens supported **reciprocal tariffs** on U.S. goods – even at the cost of higher consumer prices.



But, when asked whether the EU should relax its **Digital Services Act** in exchange for lower U.S. tariffs, **43% of Europeans opposed** the idea.



In **Poland**, however, **49%** supported such a trade-off and only 27% opposed it, signaling a **more pragmatic approach to transatlantic relations**.



Act II – The Economic Frontlines

The U.S. tariff saga shook global trade in 2025

12/2024

01/2025

03/2025

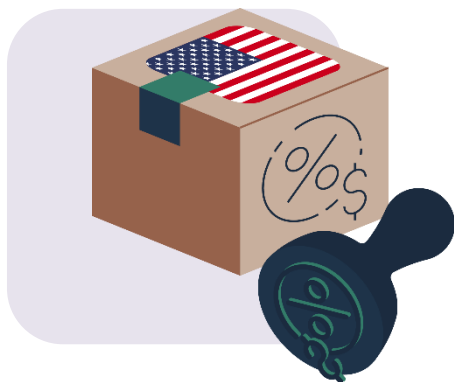
05/2025

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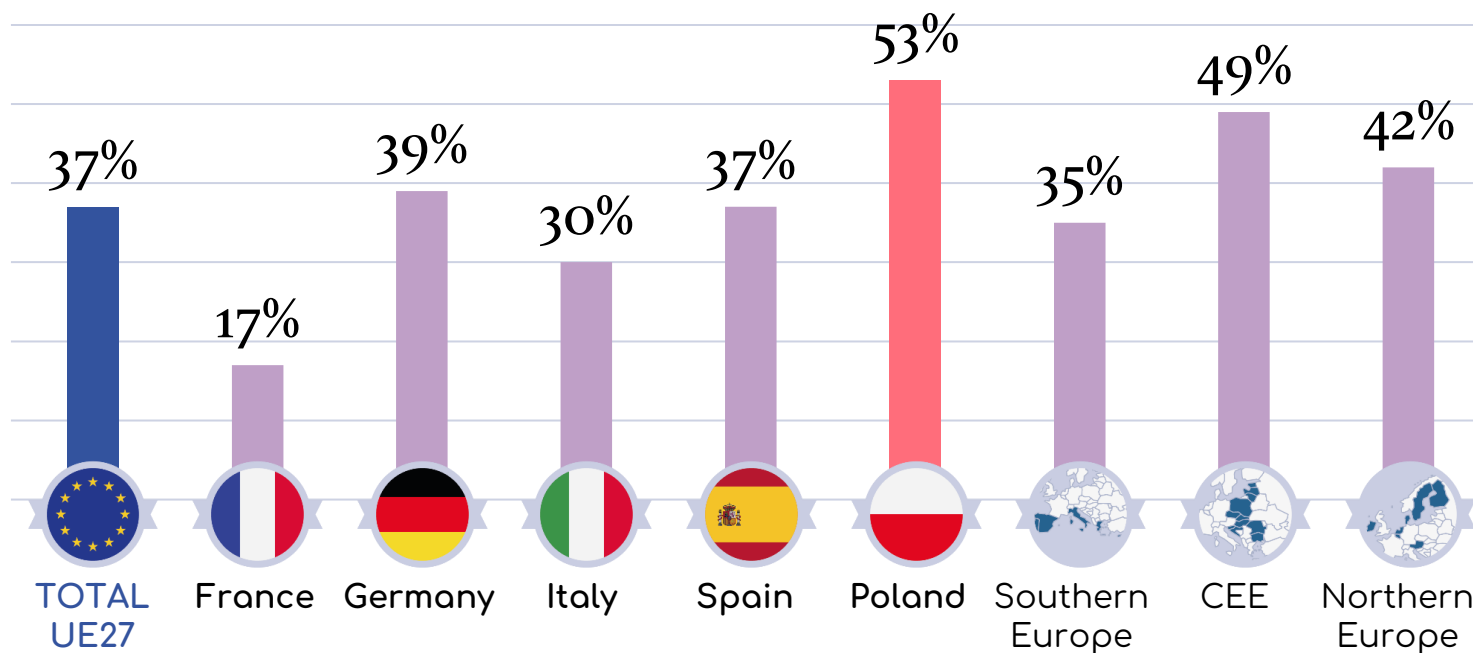
Q. Do you think that the trade deal between the United States and the European Union regarding tariffs was for European countries..

6 months later, the overall assessment of the EU–U.S. trade deal was ambivalent:



Across the Union, only **37%** considered the deal positively, vs **53% of Poles** — again reflecting a slightly different geopolitical perspective.

% Positive





Act II - The Economic Frontlines

Beyond transatlantic issues, citizens remain concerned about their domestic economies

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Among the following threats, which worries you the most in this period?
Q. How much are you satisfied with your current personal economic situation?



Despite its stabilization, the *inflation and rising prices* remain one of the most worrying threats

41% mentioned *this topic* in March



38%

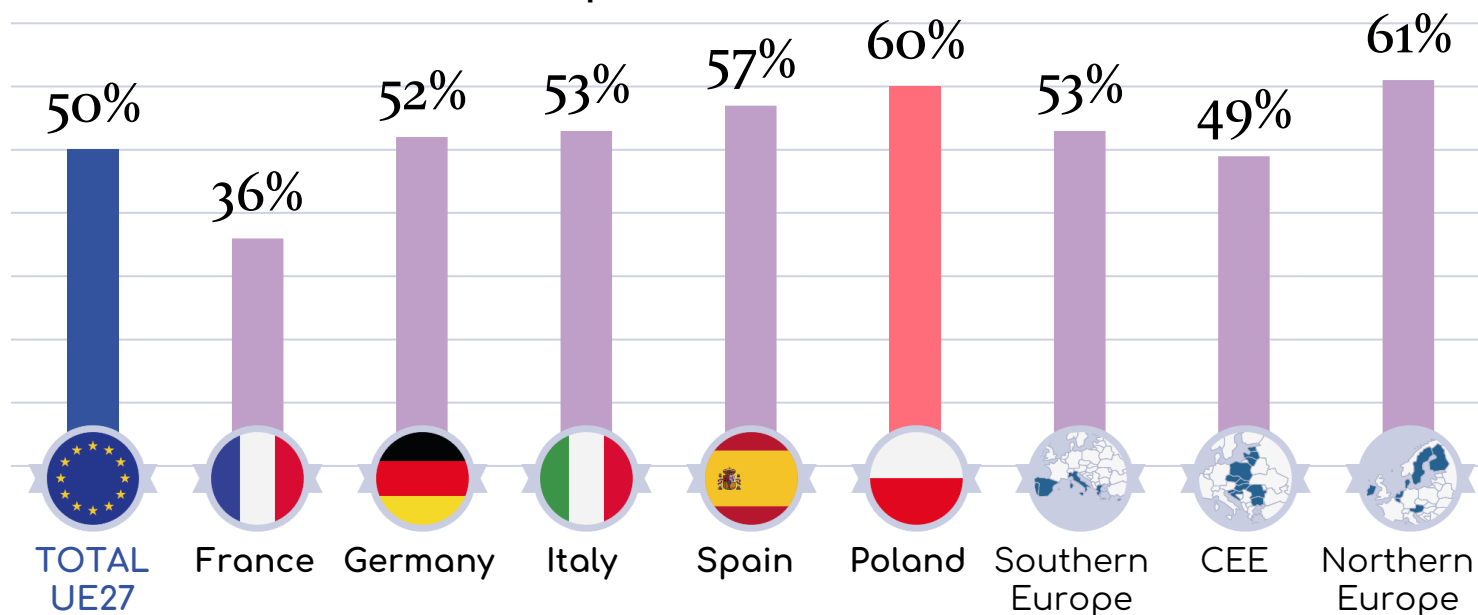
And another **24%** mentioned the *risk of a new economic crisis*



12%

However, EU citizens are generally aware that they live on a prosperous continent, with Poles being among the most satisfied with their current standard of living.

% Satisfied with current personal economic situation



” Act II – The Economic Frontlines

Digital Economy is reshaping society, the economy, and governance

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Do you think that the European Union should implement stricter regulations on artificial intelligence technologies? / Q. Which of the following statements do you agree more / Q. When you think about the use of Artificial Intelligence, what do you feel most?

2025 – The year of AI democratization

Public perception of AI is mixed.

January 2025

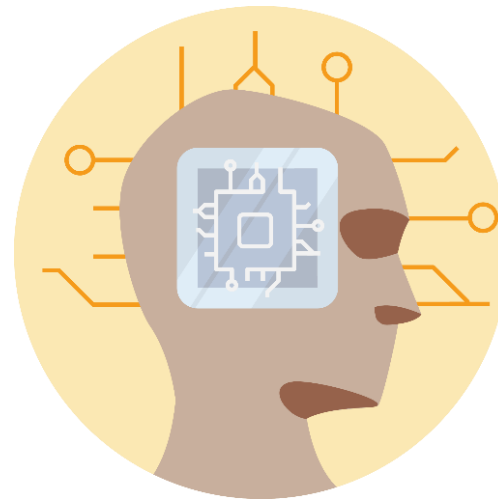
70%

the EU should implement stricter regulations on AI technologies.

March 2025

68%

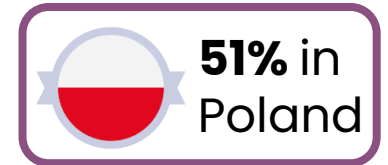
Europe should invest in technological independence from the United States



September 2025

45%

felt positively about AI



45%

expressed concern



The challenge is not only technical but strategic: how to ensure Europe remains competitive while safeguarding citizens' rights and information integrity.



Act III – Identity and Disconnection

Beyond military and economic concerns,
Europe is also grappling with questions of
identity and political engagement



Act III – Identity and Disconnection

The Eternal Tug-of-War: Integration or Sovereignty?

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. How much influence do you think people like you have on the decisions made ... ?

Q. Do you think that the European budget would be more efficient if...

EU Citizens are increasingly aware of the gap between their expectations and the decision-making processes of national and European institutions.

36%

of Europeans believed they have an impact on their **national governments**,

32%

think they could influence **EU-level** decisions.

44%

The European budget would be more efficient if **Member States had greater decision-making power over what and how to spend**



45% in Poland



39% in Poland



56% in Poland



Act III – Identity and Disconnection

The Eternal Tug-of-War: Integration or Sovereignty?

12/2024

01/2025

03/2025

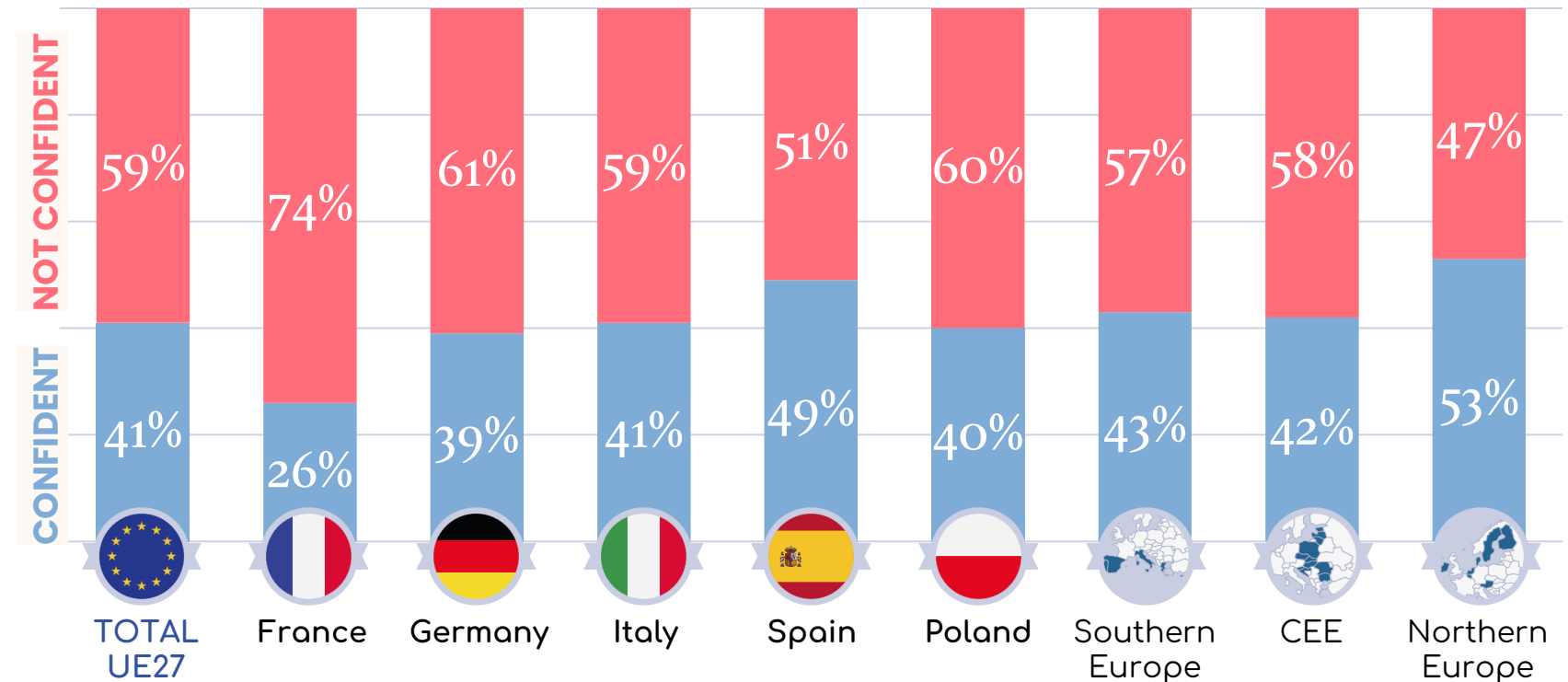
05/2025

09/2025

11/2025

Q. How much confidence do you have in the new European Commission?

This feeling of disconnection with the EU institutions is illustrated by the level of confidence respondents have towards the new commission





Act III – Identity and Disconnection

The Eternal Tug-of-War: Integration or Sovereignty?

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Comparing to one year ago, are your views of the USA?

Especially that the gap with the US big brother is perceived as wider and wider...



Comparing to one year ago, views of the USA have...

Base:

... Improved

... Worsened



TOTAL
UE27
5.115

22%

43%

Delta Improved – Worsened

-21



France

649

12%

47%

-35



Germany

848

22%

44%

-22



Italy

585

15%

52%

-37



Spain

551

25%

40%

-15



Poland

426

29%

30%

-1



Southern
Europe

1376

20%

47%

-27



CEE

1241

31%

30%

+1



Northern
Europe

1001

22%

48%

-26



Act III – Identity and Disconnection

The Eternal Tug-of-War: Integration or Sovereignty?

12/2024

01/2025

03/2025

05/2025

09/2025

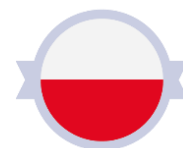
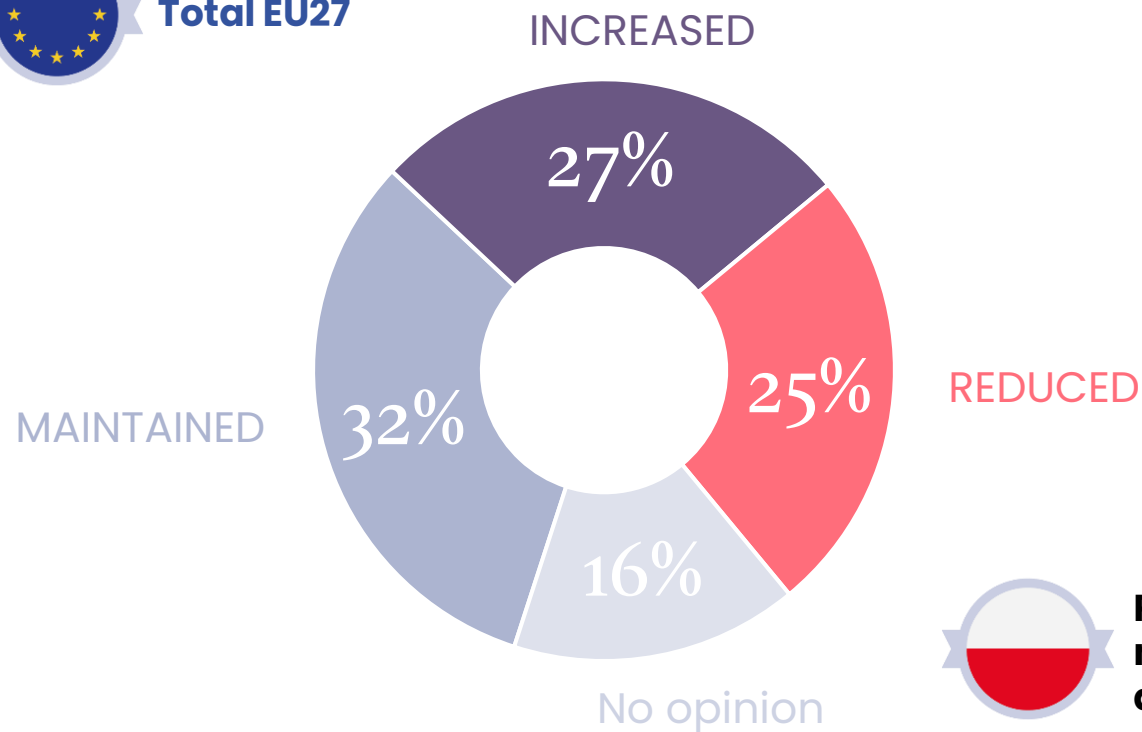
11/2025

Q. The European Parliament is the only EU institution directly elected by citizens. Do you think its powers as co-legislator, as well as its budgetary and discharge authority, should be increased, reduced, or maintained as they are?

The European Parliament's powers should be ...



Total EU27



Poles' opinion mirrored the EU average



Again, opinions are divided even if overall, **59%** think EU powers should be maintained or increased.



Act III – Identity and Disconnection

The Eternal Tug-of-War: Integration or Sovereignty?

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Would you say that the EU should regulate more, less or leave as it is each of the following areas

At the same time, EU citizens express high expectations towards the EU when it comes to protect them and their countries' economies.

% The EU should regulate more



Total EU27



Poles

Data protection and digital services...	60%	54%
Food safety, labeling, and hygiene rules ...	58%	49%
Product safety, e-commerce, and unfair commercial practices	58%	50%
Transparency and fair competition /public procurement	58%	52%
Prevent monopolies and unfair advantages for companies	57%	53%
Minimum labor standards, working conditions, ...	56%	46%
The protection of European economic interests	56%	48%
Environmental and climate standards	53%	37%
Medicines, medical devices, vaccines, ...	53%	42%
Intellectual property laws...	48%	41%
Defense spending and investment levels relative to GDP	43%	46%



Act III - Identity and Disconnection

Identity issues, symptoms of current tensions and revealing of the changes underway

12/2024

01/2025

03/2025

05/2025

09/2025

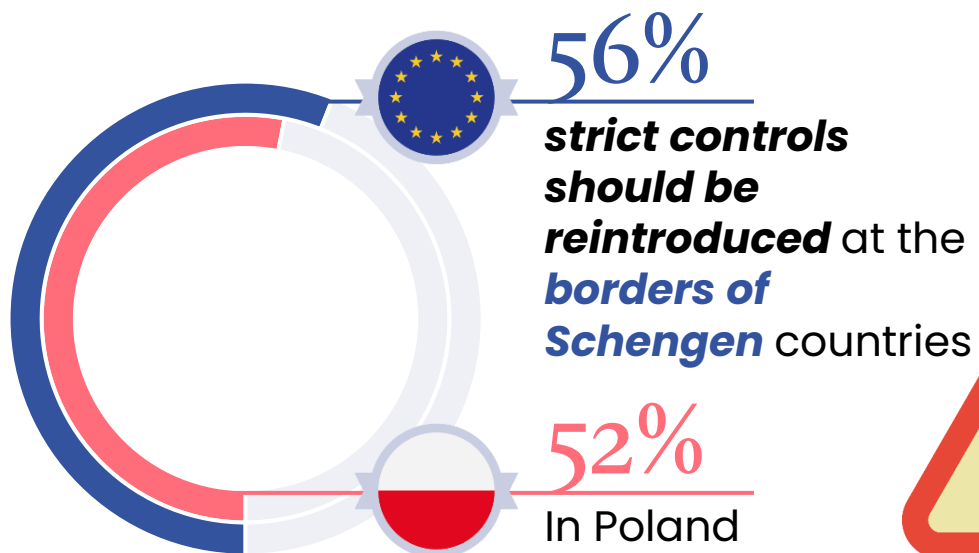
11/2025

Q. Regarding immigration issues, do you think that at the borders of Schengen countries:

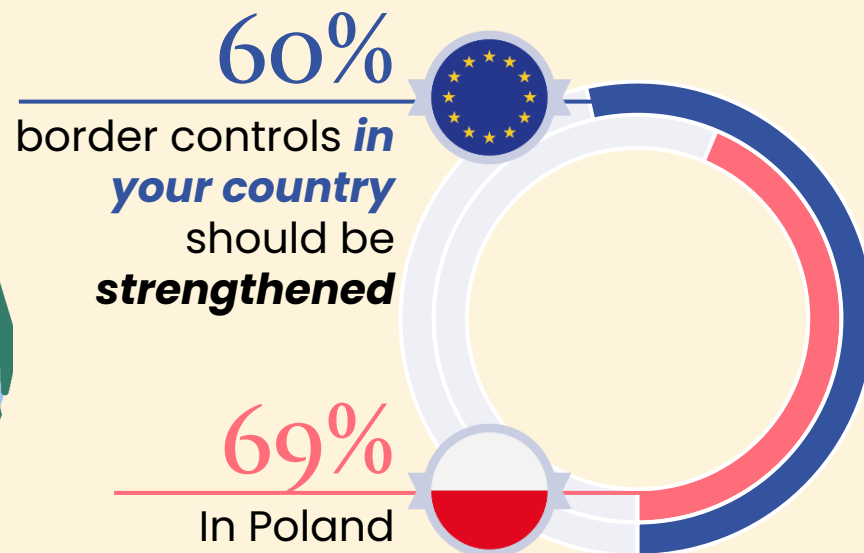
Q. Regarding the migrant arrivals, do you think that border controls in your country should be:

Identity-related concerns: symptoms of current tensions.

December 2024



May 2025





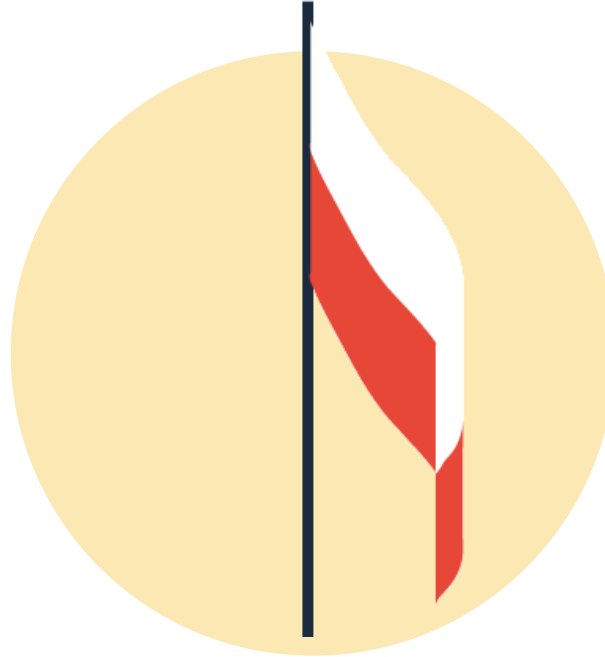
Act IV – The Polish Mirror



Act IV – The Polish Mirror

Poland as a practical lens for understanding the EU: the challenges of coordination, the nuances of local perspective, and the potential for leadership in shaping Europe's future.

A geopolitical realist, strongly supporting defense investment and EU troop deployment in Ukraine, yet skeptical of the EU's readiness and favoring national control over collective security: a frontline NATO state with deep historical caution toward supranational dependence.



Economically pragmatic and optimistic, showing higher satisfaction, confidence and a stronger attachment to the USA. This contrasts with the EU's more cautious approach, highlighting Poland's focus on growth and adaptability in global trade.

Poland's relationship with the EU reveals **ambition mixed with skepticism**: while Poles see their country as a defense and economic leader, they remain divided on deeper EU integration, often prioritizing national sovereignty. This duality underscores Poland's role as a microcosm of Europe's broader tension between unity and independence.



Act IV – The Polish Mirror

But how is Poland perceived by the other EU countries?

12/2024

01/2025

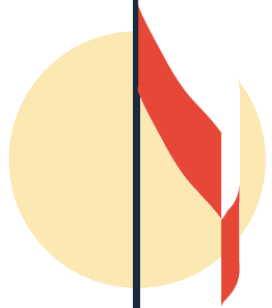
03/2025

05/2025

09/2025

11/2025

Q. Would you say that you have a very good, a rather good, a rather bad or a very bad opinion of Poland as a country overall?



Base:



**TOTAL
UE26**

4.689



France

649



Germany

848



Italy

585



Spain

551



Southern
Europe

1376



CEE

1241



Northern
Europe

1001

Positive Opinion

76%

76%

72%

73%

83%

77%

80%

74%

Very positive opinion ●

16%

12%

18%

9%

18%

14%

24%

14%

Rather positive opinion ●

60%

64%

54%

64%

65%

63%

56%

60%

Rather negative opinion ●

19%

19%

22%

23%

14%

19%

15%

21%

Very negative opinion ●

5%

5%

6%

4%

3%

4%

5%

5%

Negative Opinion

24%

24%

28%

27%

17%

23%

20%

26%



Act IV – The Polish Mirror

And how is Poland performing VS the other EU countries?

12/2024

01/2025

03/2025

05/2025

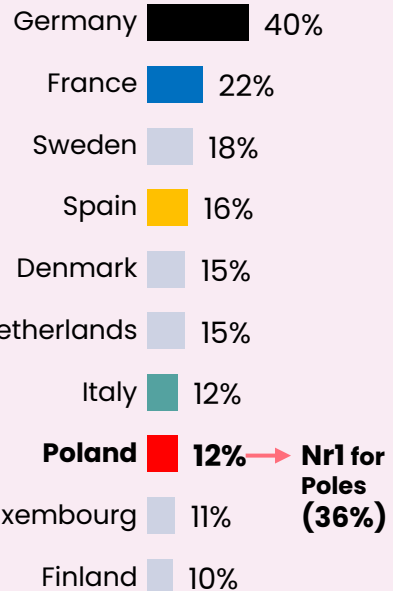
09/2025

11/2025

Q. Among the following countries, which ones... ?

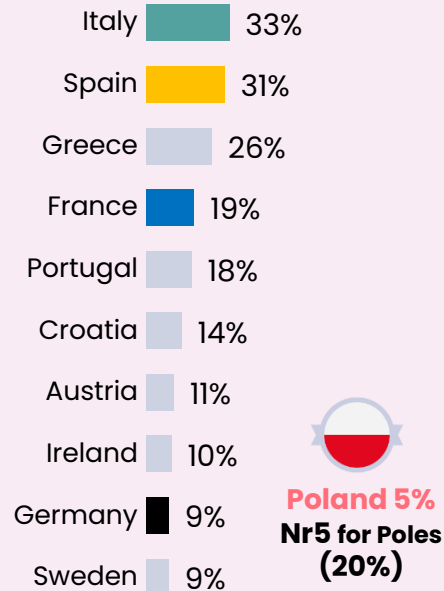
The most dynamic economically

- TOP10 -



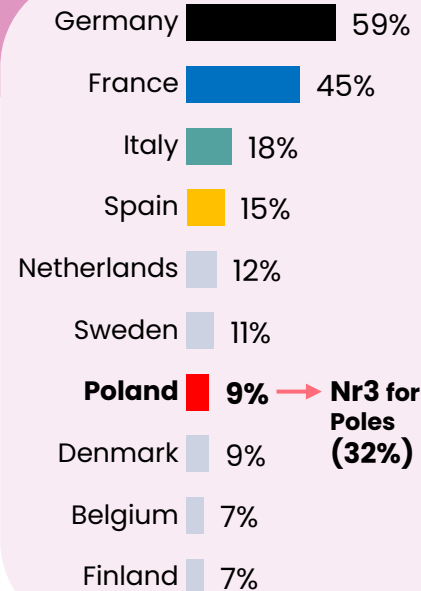
Worth visiting for holidays, tourism

- TOP10 -



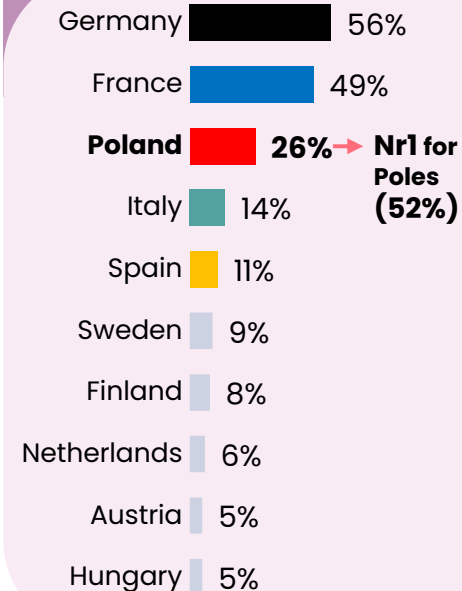
Leading countries for the EU development

- TOP10 -



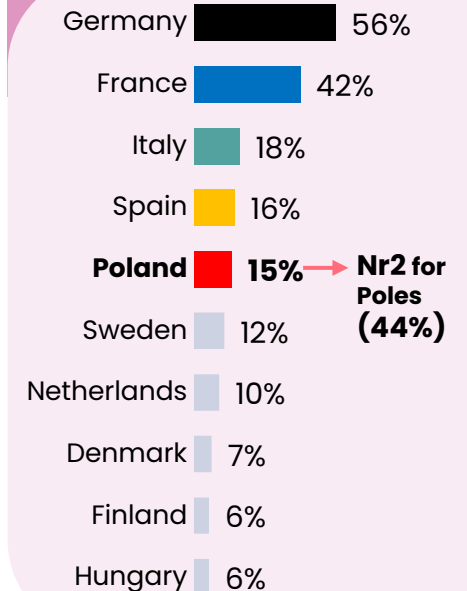
Can play a strong role to defend Europe in case of an armed conflict

- TOP10 -



Will be a strong leader in Europe in the next 10 years

- TOP10 -





Act IV – The Polish Mirror

How do European see the Future of the European Union?

12/2024

01/2025

03/2025

05/2025

09/2025

11/2025

Q. Would you say that in 20 years, the European Union will be...?
3 answers possible



Total EU27

34%

An integrated and autonomous "Europe of Defense"

34%

A globally influential political and economic actor such as the USA or China

31%

An innovative and digitally independent union, e.g. with its own chip production, AI, social platforms

30%

A socially cohesive union, where inequality is minimized

30%

A fully climate-neutral and sustainable economy



Poles

39%

A globally influential political and economic actor such as the USA or China

33%

A socially cohesive union, where inequality is minimized

32%

An innovative and digitally independent union, e.g. with its own chip production, AI, social platforms

31%

A fully climate-neutral and sustainable economy

29%

An integrated and autonomous "Europe of Defense"

The *Pulse of Europe* 2025 Place au débat !



Karol Reczkin
Centrum Analiz
MISO
Moderator



Prof. Małgorzata
Mołęda-Zdziech
SGH & Team Europe
Direct Polska



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Uniwersytet SWPS



Maciej Legutko
Pracodawcy RP



Red. Konrad
Piasecki
TVN24



Bruno Jeanbart
VP of OpinionWay
& DGM of Polling Europe



Nicolas Curtelin
General Manager
OpinionWay CEE

Warsaw | 02/12/2025



Methodology

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Research Methodology

Any total or partial publication must **imperatively** include the following full mention:

« Sondage OpinionWay “The Pulse of Europe” with Polling Europe and MISO »

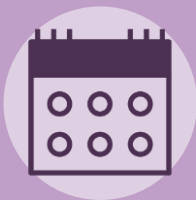
and no reproduction of the survey may be dissociated from this title.



This survey was conducted on a sample of **5,107 people**, representative of the population of the **European Union aged 18 and over**.

The interviews were distributed **proportionally to the population of the 27 EU countries**, with a slight adjustment to allow for analysis at both the **pan-European level** and by subgroups for the **five largest countries** (Germany, France, Italy, Spain, and Poland), as well as for **three geographical areas**: Eastern Europe, Northern Europe, and Southern Europe. For each country, **proportional quotas** were established according to **age and gender**, calculated based on the **most recent parameters provided by Eurostat**.

The sample was interviewed **using a self-administered online questionnaire** via the **CAWI system (Computer Assisted Web Interviewing)**.



The interviews were conducted all along the year 2025.
The last wave was carried out from **November 14th to 24th 2025**.

OpinionWay and Polling Europe conducted this survey in accordance with the **procedures and rules of ISO 20252**.



The results of this survey should be interpreted taking into account **the margins of uncertainty**: 0.6 to 1.5 points at most for a sample of 5,000 respondents.

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Founded in 2000 on what was then a radically innovative idea, OpinionWay was a pioneer in transforming the practices of the marketing and opinion research profession.

Building on continuous growth since its inception, the company has consistently expanded its horizons to better address all marketing and societal challenges. It has incorporated into its methodologies Social Media Intelligence, the use of smart data, creative co-creation dynamics, community-driven approaches, and storytelling. Today, OpinionWay continues its growth momentum by geographically expanding into high-potential regions such as Eastern Europe and Africa.

This mission drives the employees of OpinionWay and underpins the relationships they build with their clients.

The pleasure they take in providing answers to the questions their clients ask, reducing uncertainty in decision-making, tracking relevant insights, and co-creating future solutions fuels every project they undertake. This enthusiasm, combined with a genuine passion for innovation and knowledge-sharing, explains why clients report high levels of satisfaction after each collaboration – 8.9/10 – and a strong recommendation rate – 3.88/4. Enjoyment, commitment, and intellectual stimulation are the three guiding principles of our work.

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Nicolas Curtelin
Managing Director

Tel: +48 780 634 946
ncurtelin@opinion-way.com