

Mapping the New Geopolitical Axis

How Trump's second term is reshaping global alliances, and how Europe may respond

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Introduction

The second presidency of Donald Trump has brought US global strategy back to the forefront of the news cycle. The United States' National Security Strategy document, published in November 2025, made clear the administration's goals to "restore American preeminence in the Western Hemisphere, and to protect [...] access to key geographies throughout the region".

This expansionist approach to foreign policy, nicknamed the 'Donroe Doctrine', envisions a bipolar world order in which the United States asserts itself as the dominant player in the Western Hemisphere, countering China in the East.

The US has already taken action in Venezuela and threatened intervention in a number of other countries including Greenland (a threat later walked back, at least publicly). Danger perceptions are rising across the world. In the UK, US and France, at least three in five adults now say they are 'very much' or 'a good deal' worried about a war involving their country.

Recent actions have accelerated a reckoning in Europe about how the continent sees itself in the world and positions itself for the future, with United States alliance no longer assured in an era of 'America First' foreign policy. Alignment with China is widely agreed to be off the cards, and new survey data confirms this is not merely elite opinion. Just 4% of British respondents and 7% of those in France favour alignment with China over the European Union or United States. That leaves two potential paths: continue to align with the United States, or reject the idea of a bipolar axis entirely and attempt to build a rival third sphere of influence centred on Brussels.

We analysed decades of United Nations voting data and responses to the World Values Survey and have proven empirically that the geopolitical centre of gravity is already shifting away from the United States and towards China, driven mainly by Europe's increased distance from the US under the Trump presidencies. We also find that Central and South America are likely to have an outsized influence on the future balance of power.

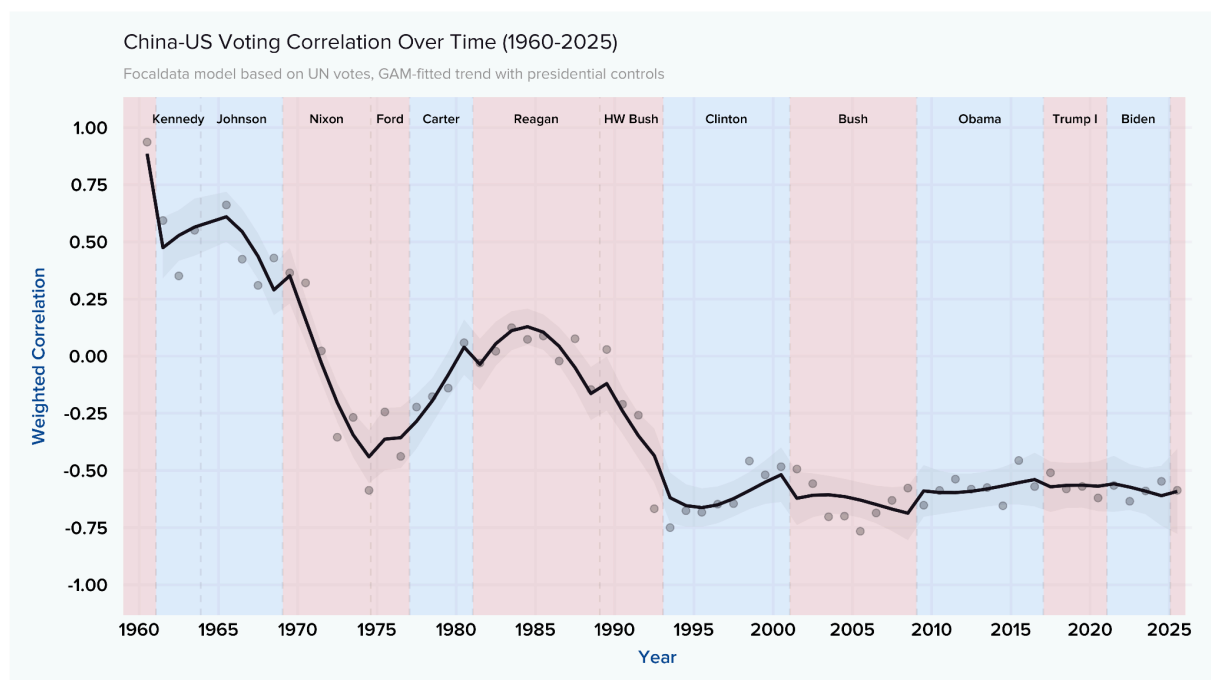
Our analysis suggests that the United States is unlikely to be able to bring Europe onside in its pursuit of a bipolar axis. We have conducted public opinion studies in the United States, the United Kingdom and France, the latter of which reveal the collapse in favourability for the US and desire for greater European integration.

America First or America Alone?

“America First does not mean America Alone”

Scott Bessent, US Treasury Secretary, World Economic Forum, January 2026

Recent events have sparked considerable discussion about how the United States is reshaping the geopolitical order, but few attempts have been made to comprehensively map the new landscape with hard data. Inspired by the work of Michael Bailey, Anton Strezhnev and Erik Voeten at Georgetown University, we analysed decades of voting data from the United Nations and created a unidimensional axis of the major poles of influence, mapping the positions of nearly 200 countries over time. We found that the US-China axis only emerges in a meaningful way following the collapse of the Soviet Union, so we trimmed the data to 1992 onwards for our analysis.



We created weighted correlation coefficients for each country's UN votes in every year, with individual votes weighted based on their divisiveness. Unanimous resolutions received effectively zero weight, while split decisions received the highest weights.

We then positioned each country on a US-China axis based on their weighted correlation coefficient with both countries, where the United States was set to -1 and China to +1.



Let's look at Albania in 2025 (the first row in our dataset).

x_C : Weighted correlation with China (**-0.282**)

x_U : Weighted correlation with the United States (**0.122**)

UC : Weighted correlation between the United States and China (**-0.587**)

A_x : Relative alignment score on unidimensional US-China axis:

$$(x_C - x_U) / (1 - UC) = \mathbf{-0.255}$$

This places Albania about five-eighths of the way towards the United States on the axis.

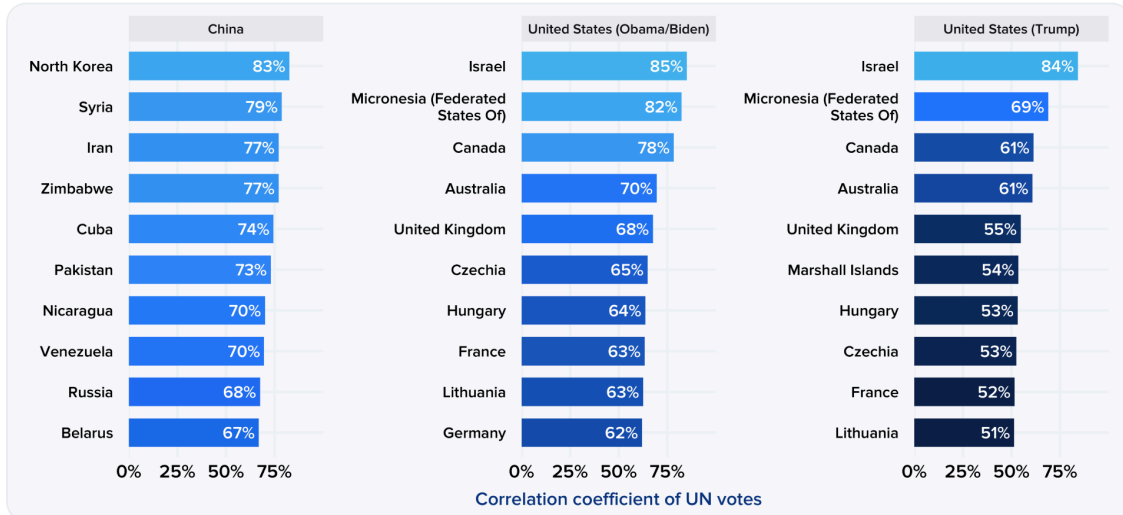
Given the variations in axis scores across US presidencies, we then created smooths for each country's axis position, with controls for the president in each year.

Weighting the scores for each country by 2026 GDP estimates, we find that the geopolitical centre of gravity is further away from the United States and closer to China under Donald Trump's two terms as president than at any other point this century.

Consider the countries with the highest correlations with each superpower's voting records. Since Barack Obama took office in 2009, **59** countries have produced a weighted correlation coefficient with China higher than 50%, including Russia, India and Indonesia. Under the combined years of Obama and Joe Biden, the United States could count on 42 countries with similarly strong alignment. Under Trump, that number has collapsed to 16, and of the few votes held under Trump's second term, just two countries meet the 50% threshold: Argentina and Israel.

US allies have collapsed under Trump

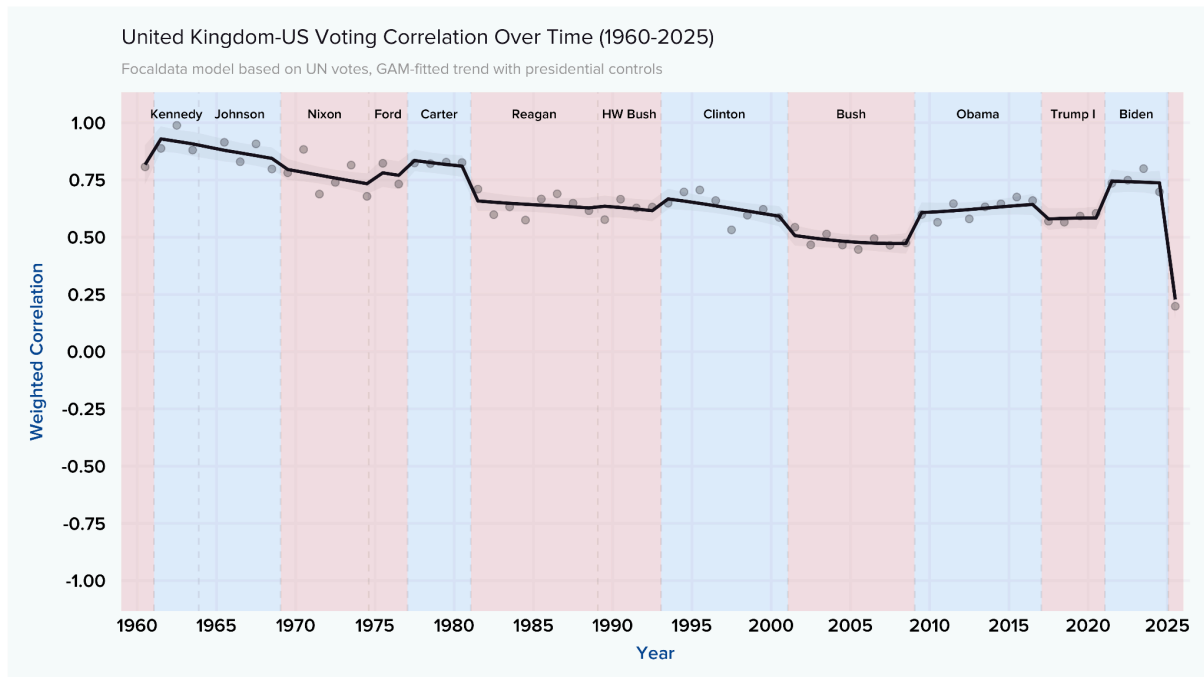
TOP 10 COUNTRIES BY WEIGHTED UN VOTE CORRELATION COEFFICIENT



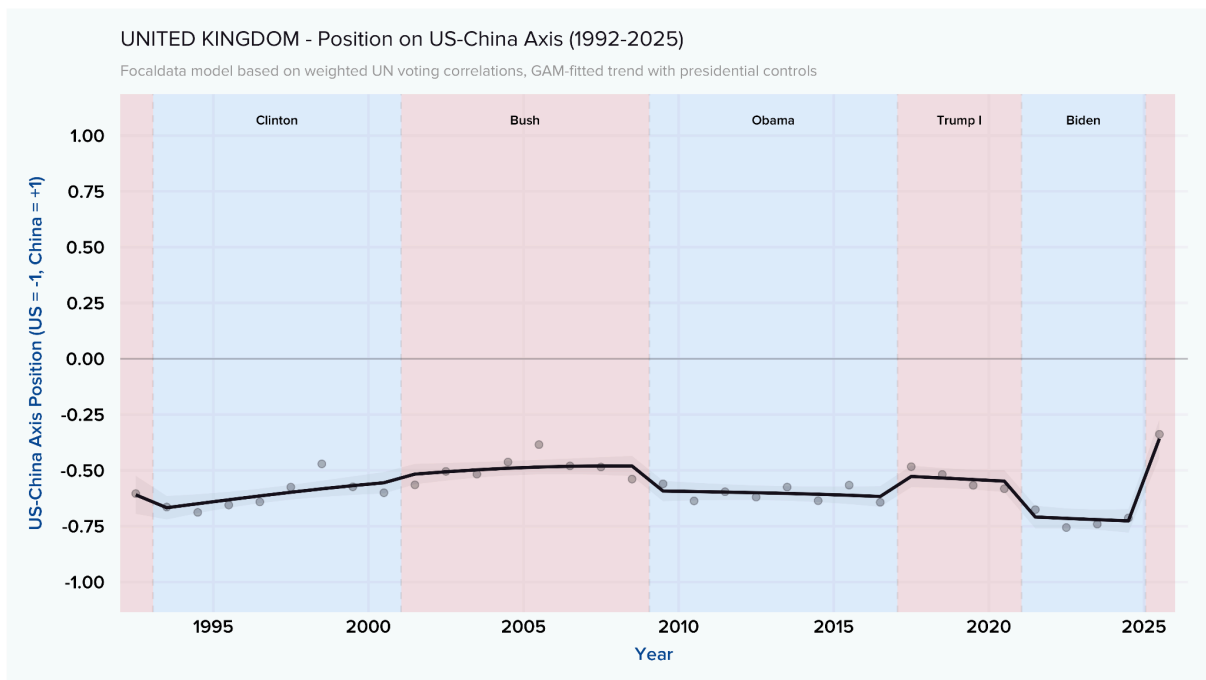
Scores created through the correlation coefficients for each country with the US and China in all UN votes held under different US presidencies, with votes weighted by divisiveness.



The drop in UK-US alignment has been particularly acute, and is now at its lowest level since these records began, with a drop-off in 2025 steeper than any other year. The late 2020s could represent a geopolitical earthquake in the relationship between Europe and the United States, the likes of which we have not seen in the modern era.



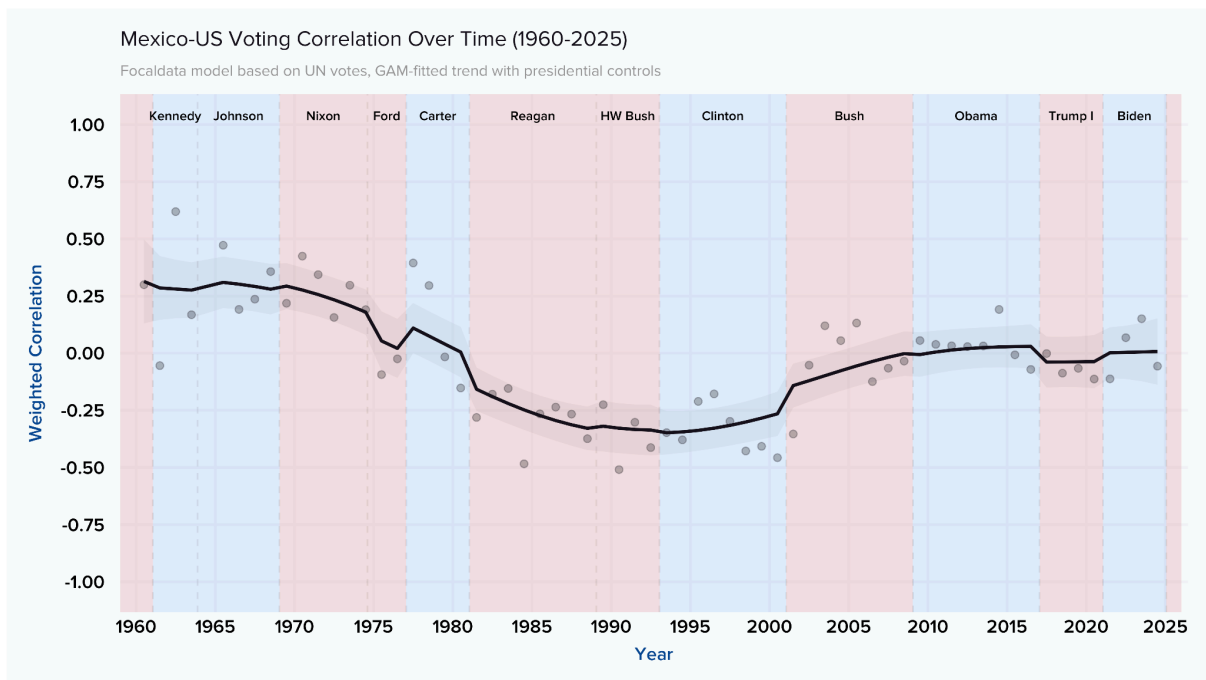
On our US-China axis, the UK is now closer to China than at any previous point.



The axis represents a lot more than the votes of individual ambassadors on largely-symbolic motions. It gives us a direct insight into the strategies and alliances of the players in the global order, serving as a unidimensional proxy for trading alignment, security, conflict and global influence. Historical analysis reveals voting patterns track deeper geopolitical shifts. Two examples illustrate this.

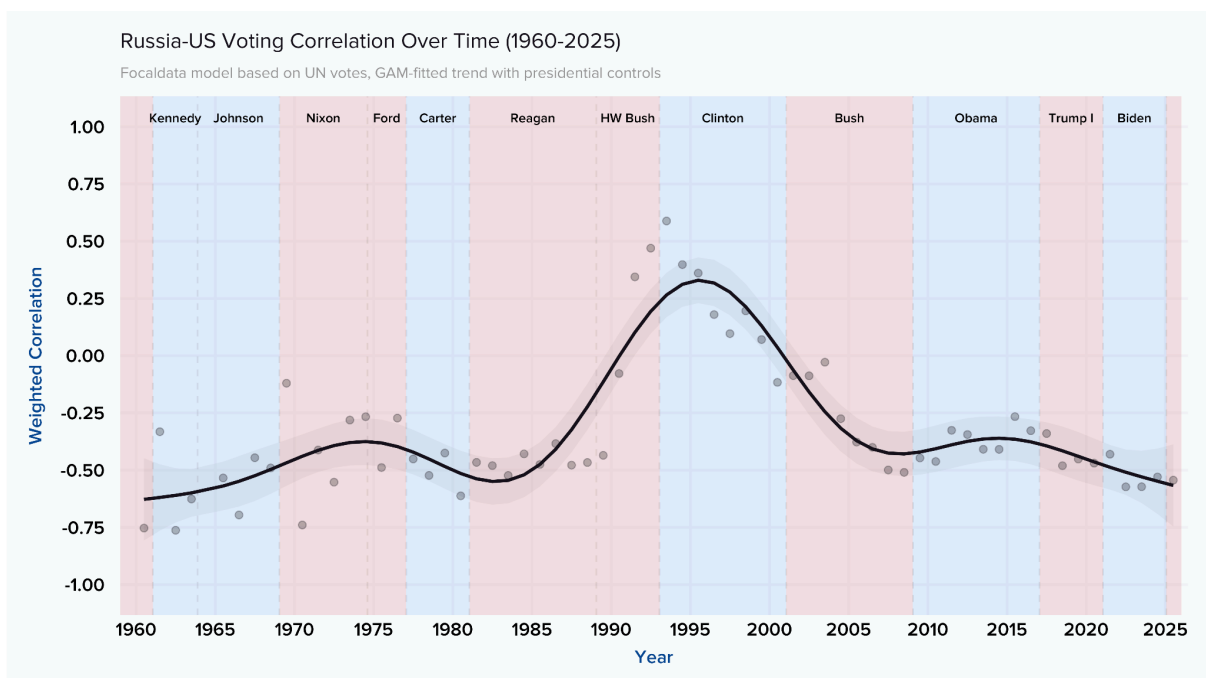
Mexico and NAFTA

Within a decade of the signing of NAFTA in 1992, Mexico's correlation coefficient with the United States had shifted from -0.413 (i.e. typically voting against the US) to -0.052 (basically uncorrelated), and continued to move towards their neighbours before becoming marginally positively-correlated under most of the Obama administration. As Mexico's economy integrated with America's, its foreign policy followed, and UN votes shifted to more closely match Washington's positions.



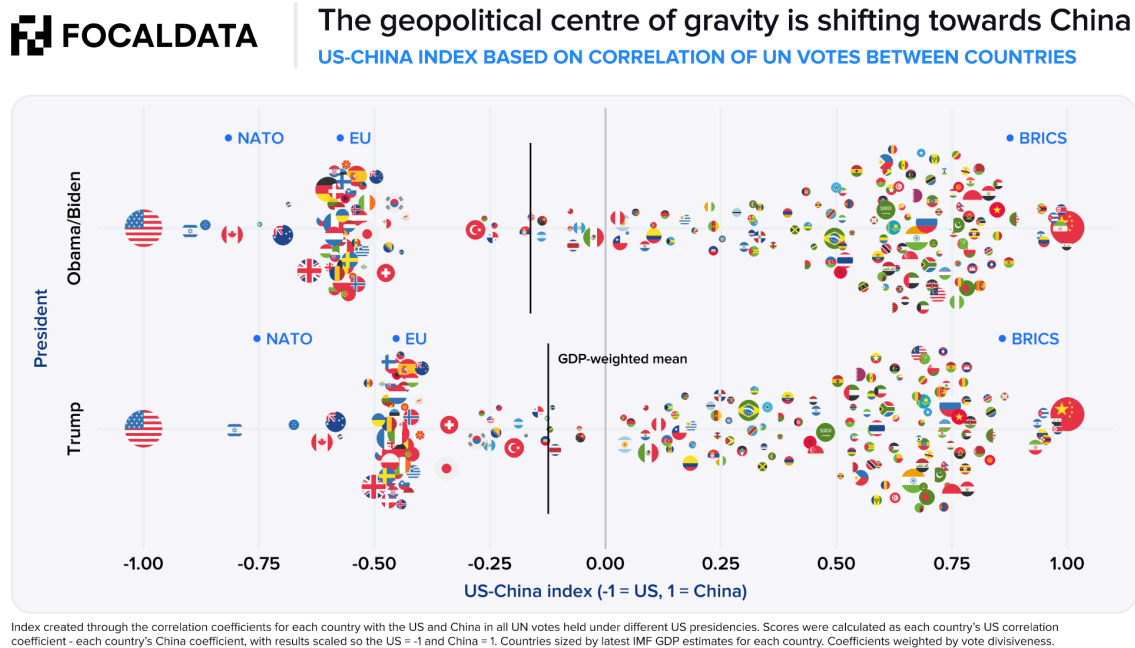
Russia's Decade of Westernisation

Russia, meanwhile, saw rapid shifts towards the United States as the Soviet Union collapsed, peaking at a pro-US correlation of +0.588 under the Yeltsin presidency. Just as rapidly, Russia then began to shift back towards an oppositional position, ending a decade of relative US alignment in 2000 as the Putin era began.



The New World Map

When we map all the countries in the dataset, we see how stark the shifts in the global landscape are, even before many of the consequences of the new era of US strategy have made their way into the voting data:



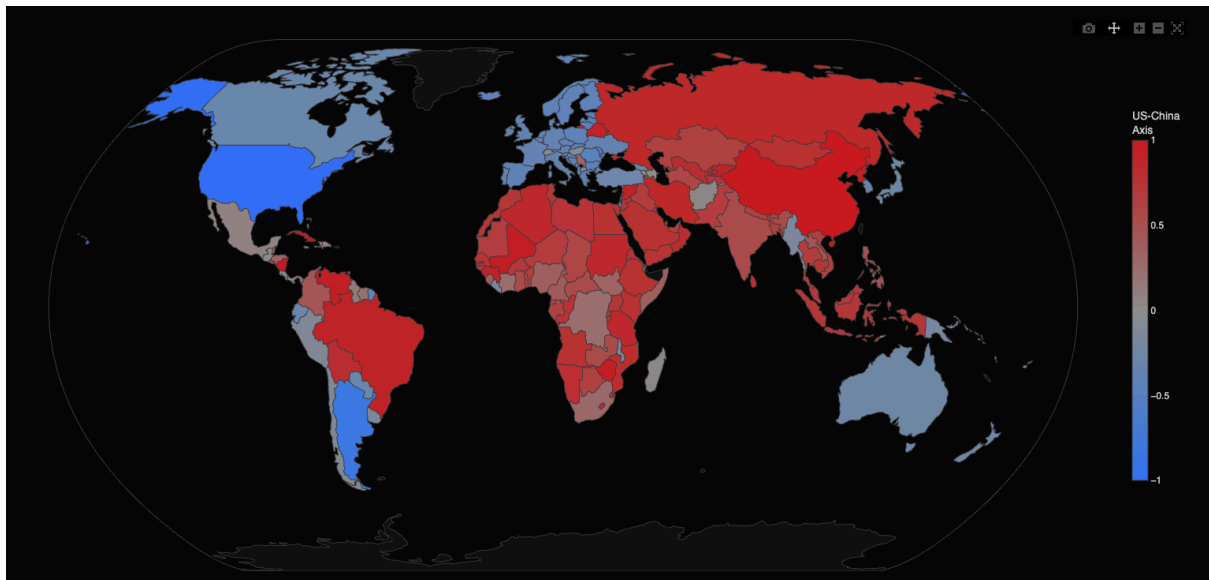
The United States is looking increasingly isolated on the world stage. Based on 2026 GDP estimates, the GDP-weighted mean position was -0.162 under the Obama and Biden administrations. In the Trump era, the American advantage over China has collapsed by about 25%, with the weighted average now sitting at -0.124.

The EU sees some of the largest shifts, moving by an average of 12 percentage points, from -0.57 under Obama and Biden to -0.46 under Trump. Canada, once America's most reliable ally, and a midpoint between Washington and the European Union, has moved by 20 points, from -0.81 to -0.61.

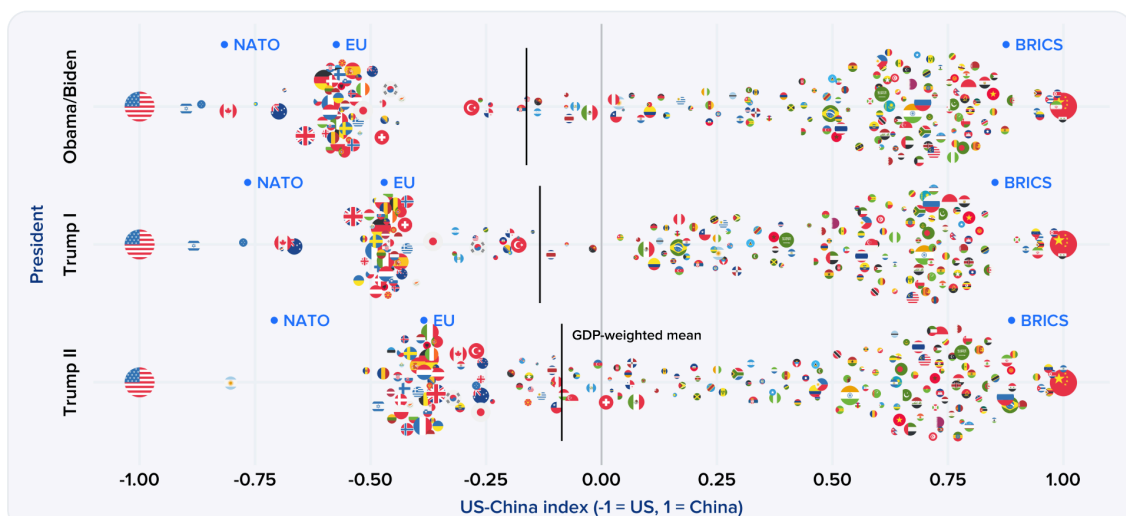
While most of Europe has shifted away from the US, some countries have moved in the opposite direction. Brazil, for example, shifted by 19 points towards the US (driven primarily by the close alignment of the two countries under Jair Bolsonaro's presidency, whose time in office accounts for about 40% of the Trump-era data), but this shift has already been reversed under Lula. Gulf states have also moved towards the US, with the UAE, Saudi Arabia and Qatar shifting by 13, 13 and 12

points respectively between the Obama/Biden and Trump eras, reflecting deepening security cooperation.

We have built a full interactive dashboard, in which you can track every country's position over time. You can access it on our website [here](#).



When we split out Trump's first and second terms, the shifts are even more stark. The European drift has accelerated since since January 2025:



Index created through the correlation coefficients for each country with the US and China in all UN votes held under different US presidencies. Scores were calculated as each country's US correlation coefficient - each country's China coefficient, with results scaled so the US = -1 and China = 1. Countries sized by latest IMF GDP estimates for each country. Coefficients weighted by vote divisiveness.

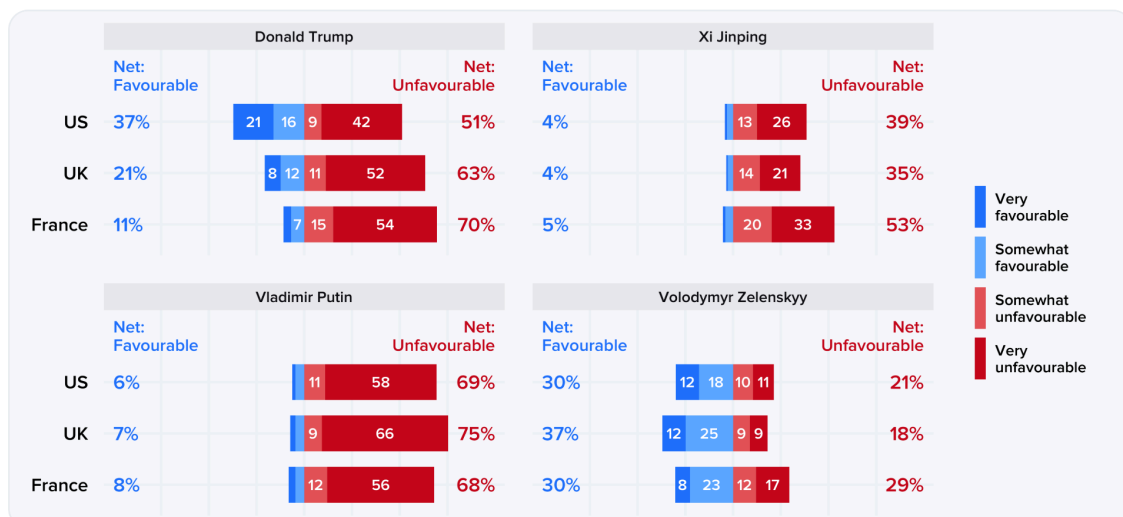
The map makes clear the potentially fragile position the US finds itself in, with a fundamental asymmetry between its gravitational pull and China's. Countries aligned with China follow a roughly normal distribution on the two-country axis, rendering China's influence much more stable. The Chinese network is like a beehive, in which a conflict with one country does not undermine the wider structure. In contrast, the United States' influence relative to China is almost entirely reliant on a tightly-correlated European bloc, which has moved dramatically away in recent years. The US network looks more like a Jenga tower. Pull out the Denmark-coloured brick from the bottom of the tower and the whole thing could collapse.

No Increase in Pro-China Sentiment

We find little evidence that European movements along our axis are driven by increases in favourability towards China. Rather, souring sentiment towards the United States is pushing Europe towards a more nuanced position. Similar studies, including analysis in the *Economist*, show China's star rising in relation to the United States, rather than in and of itself. Just 4% of Britons have a favourable view of Xi Jinping, a paltry figure matched by the 4% of Americans and 5% of French people who say the same.



Xi Jinping is unpopular across the West WORLD LEADER FAVOURABILITY RATINGS BY COUNTRY



UK fieldwork 16-19 Jan 2026 with a sample size of 1,585. US fieldwork 23-26 Jan 2026 with a sample size of 2,105. France fieldwork 3 Feb 2026 with a sample size of 1,198. Results weighted to be nationally-representative by country.



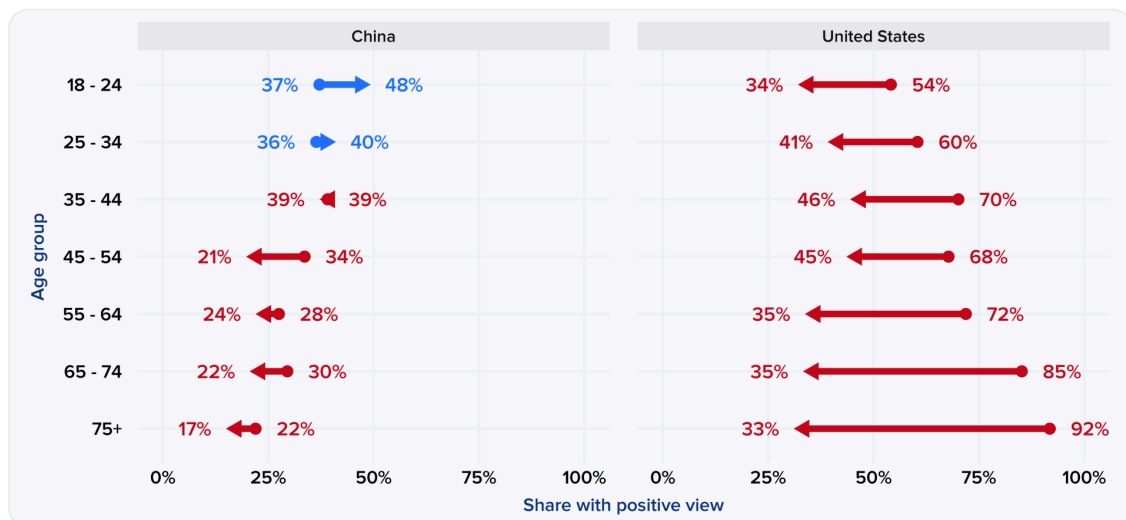
Likewise, only 30% of British respondents hold a favourable view of China, three points lower than the share who held a favourable opinion on the country 10 years ago. Although there is some evidence of increased China favourability among younger people (41% of under 45s have a positive view of the country, up three points), these gains are more than offset by declines among older age groups.

In contrast, the United States' favourability ratings have collapsed: two-in-five respondents (39%) have a positive view of the US, barely more than half what the share was 10 years ago (71%). The drop is disproportionately driven by steep falls among voters aged 55 and over. Among those aged 65-plus, the United States has replaced a position of near-universal favourability (88%) with one in which those above retirement age are now less likely than any other cohort to hold a positive view of the country (34%).



The United States' favourability is collapsing in the UK

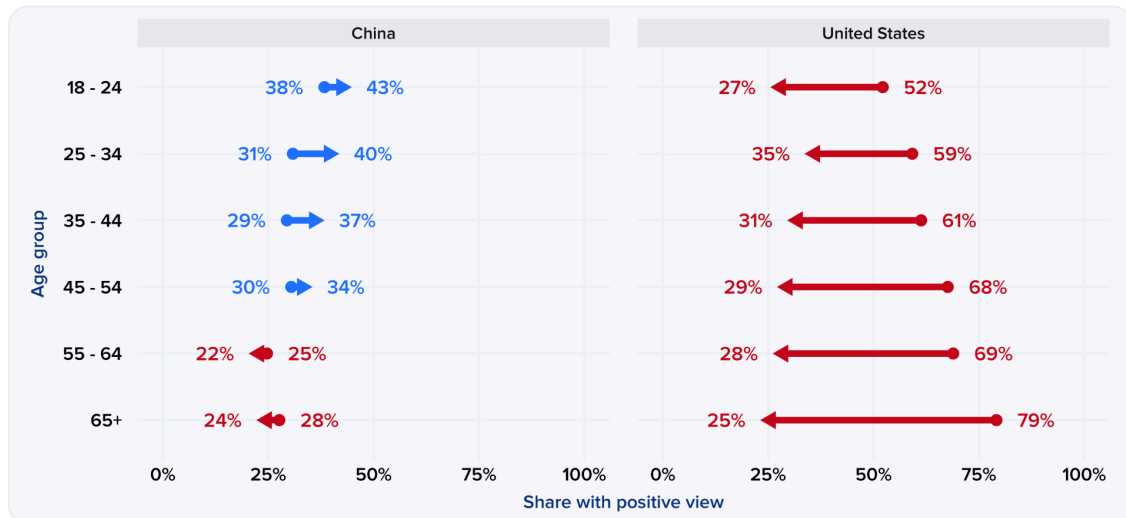
PAST VS CURRENT SHARE WITH POSITIVE VIEW OF EACH COUNTRY



Fieldwork conducted 16 to 19 January 2026, with a sample size of 1,585 respondents. Results weighted by age, gender, region, education, ethnicity, recalled 2024 vote and political interest.



In France, the story is almost identical, albeit with slightly larger uplifts in support for China among younger respondents. With all age groups under 55, the United States is now less popular than China.



Fieldwork conducted 3 February 2026, with a sample size of 1,198 respondents. Results weighted by age, gender, region, education, recalled 2022 vote and recalled 2024 vote.



The story here is not of China winning hearts and minds across the West, but of the United States rapidly losing support among its closest allies.

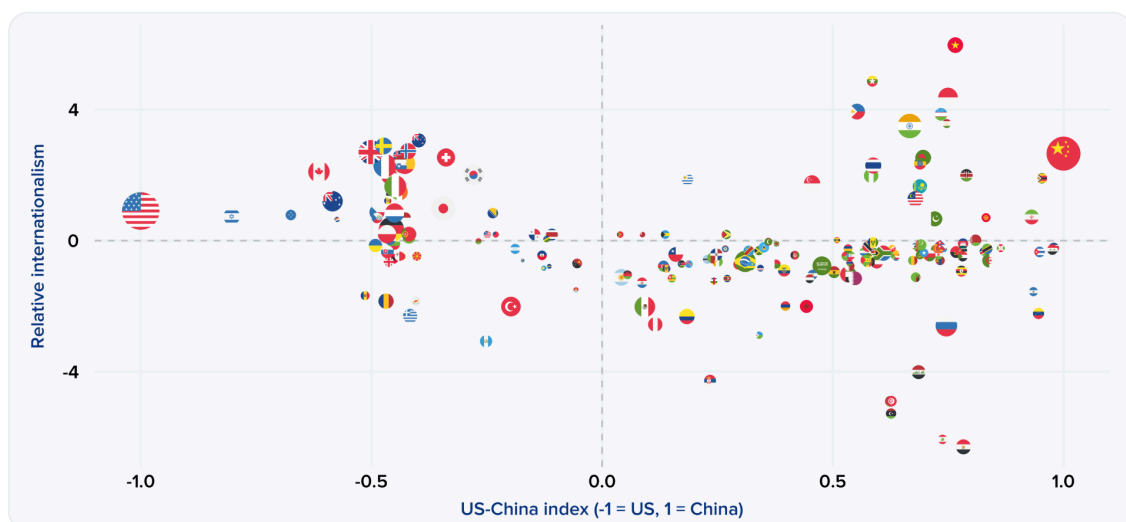
Global Values

Reducing global alliances to a singular axis is unlikely to capture the full variation in the data, so we also residualised the results of Wave 7 of the World Values Survey using our UN-based axis (Trump-era data only) to find the next component which explains the greatest variation in country-to-country views.

Our second axis, based on the opinions of citizens rather than UN delegates, is broadly defined as relative levels of internationalism, characterised by positive views on migration and international institutions like the UN, IMF, NATO and the World Trade Organisation.



The geopolitical centre of gravity is shifting towards China
BASED ON UN VOTE CORRELATIONS AND WORLD VALUES SURVEY RESPONSES



US-China index created through the correlation coefficients for each country with the US and China in all UN votes held under different US presidencies, with votes weighted by divisiveness. Internationalism index created through country-level responses to Wave 7 of the World Values Survey.



There is a clearer division here between the more internationalist countries in Western Europe and the Anglosphere, and the less internationalist grouping in Southeastern and Eastern Europe, but the continent's major economies still cluster together quite closely.

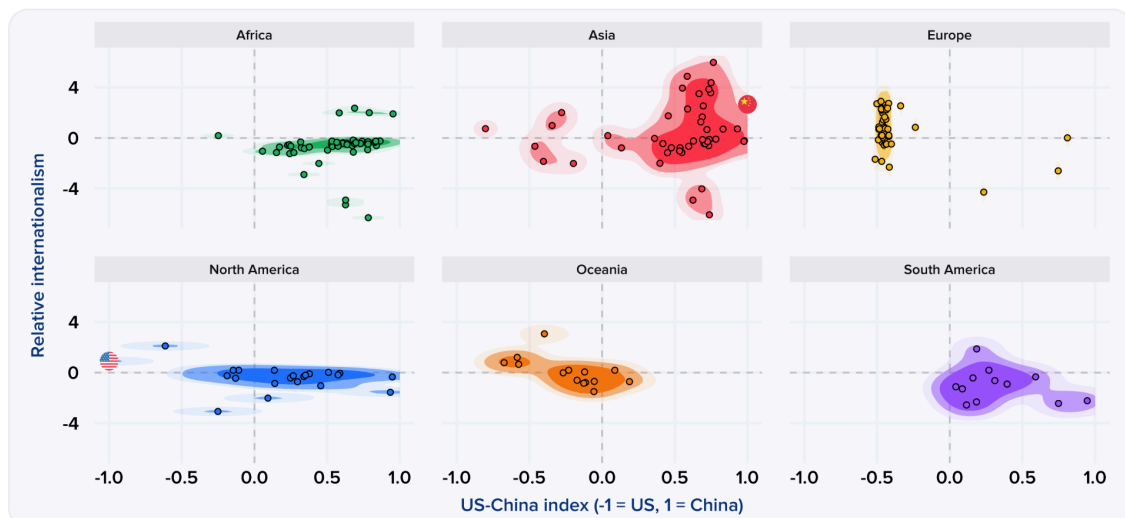
Further clusters also emerge: the MENA grouping of Iraq, Egypt, Libya and others, for example, falls very low on the internationalism scale, potentially aligned with China due to opposition to historic US foreign policy positions, rather than ideological similarity.

The two-dimensional arrangement underscores the importance of Central and South America to the global balance of power, with many countries lying roughly equidistant between the two major

poles. Trump's 'Greater America' vision becomes clear in this context. Direct control of the American hemisphere would bring 'swing countries' like Brazil, Mexico, Argentina and Colombia inside, reducing China's influence in this key region and compensating for America's loss of influence in Europe.



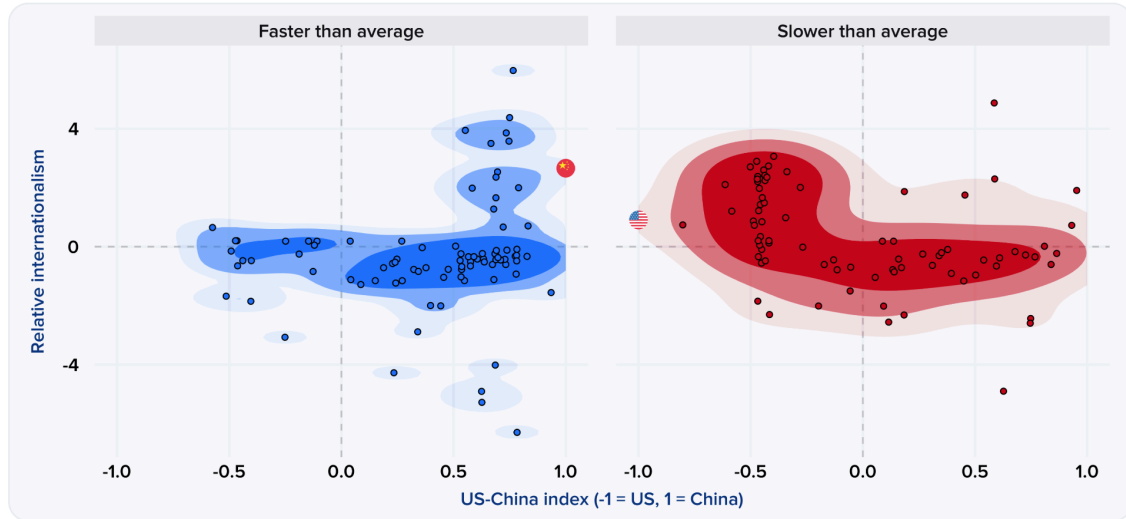
Many S. American countries sit at the centre of the index BASED ON UN VOTE CORRELATIONS AND WORLD VALUES SURVEY RESPONSES



US-China index created through the correlation coefficients for each country with the US and China in all UN votes held under different US presidencies, with votes weighted by divisiveness. Internationalism index created through country-level responses to Wave 7 of the World Values Survey.



When we examine economic trajectories, another pattern emerges, with the fastest-growing economies tilting towards China. Using CEBR projections for 2040, countries with GDP growth rates higher than average show higher alignment scores with Beijing than Washington. The US is betting that its current economic and military dominance will be enough to hold continual influence and keep allies inside, but China is betting on the future.

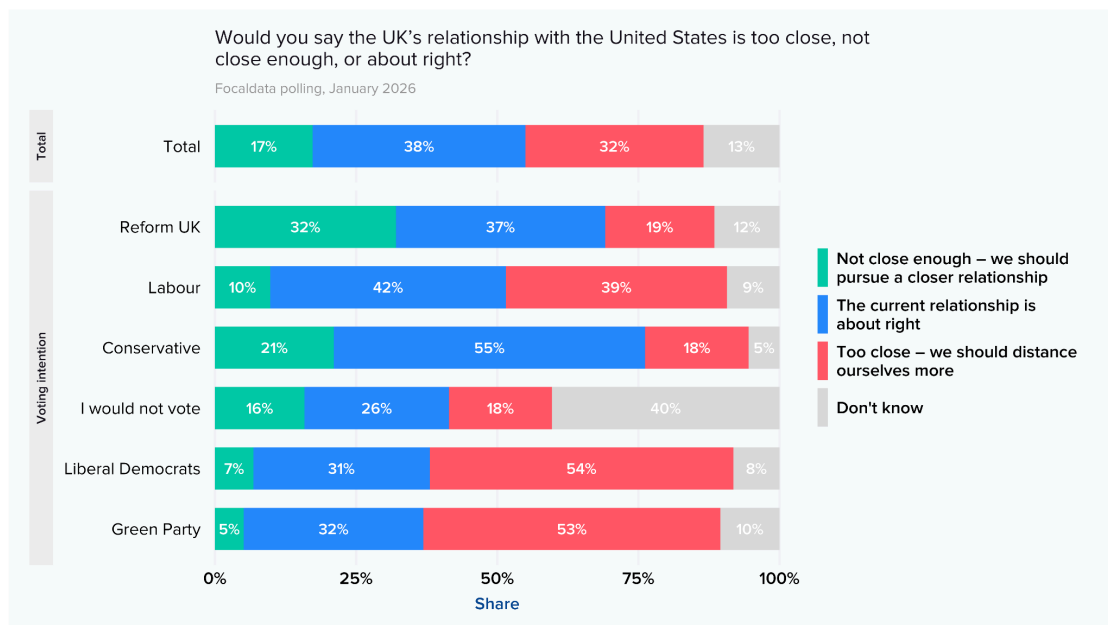


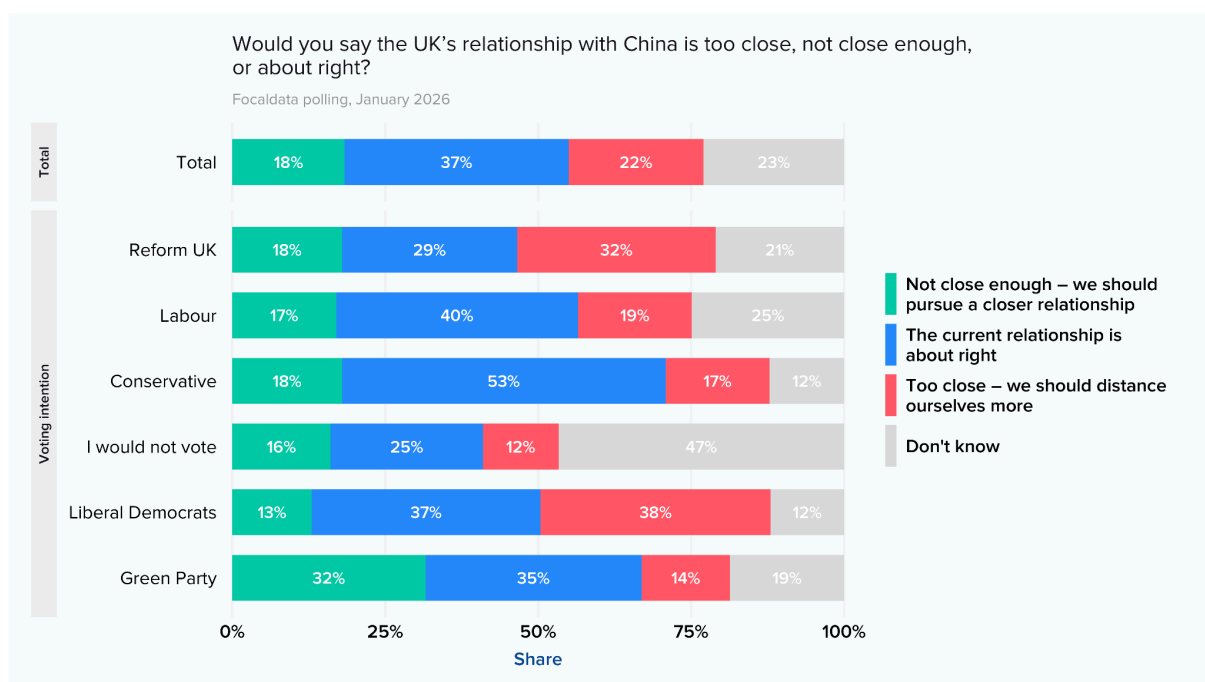
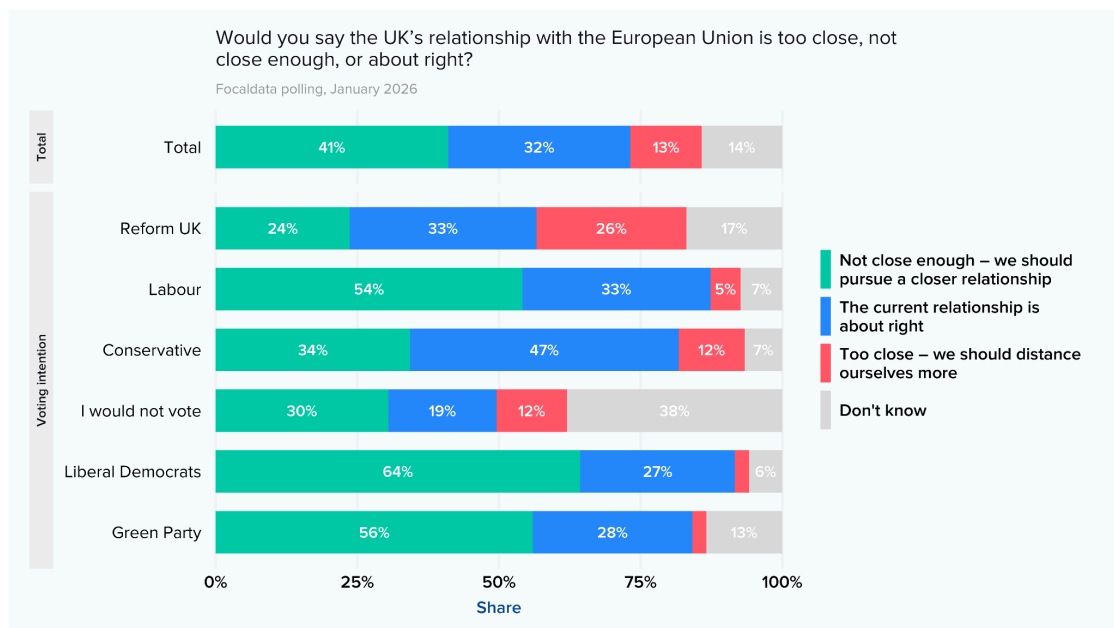
The Third Sphere

Our UN voting analysis indicates that Europe is moving away from the United States but not necessarily towards China, and our survey data backs this up. The US-China binary is broadly rejected in Western Europe, with European strategic autonomy emerging as a preferred path.

Brussels over Washington

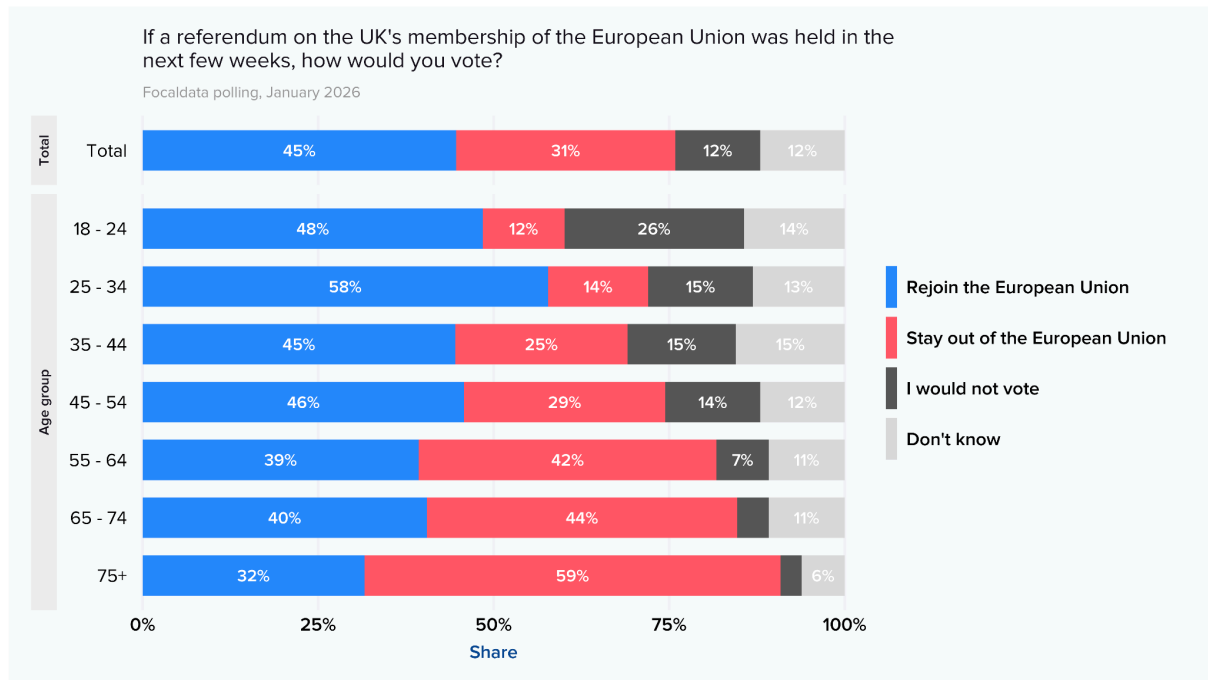
In the UK, the public's general inclination is for greater European collaboration while holding the US at arm's length. Britons tend to think the UK's relationship with China is about right (37%), want closer ties with the European Union (41%, with only 13% saying the relationship is too close) and are split on whether the UK should distance itself more from the US (32%, versus 38% saying the current relationship is about right). Closer alignment with the United States is a minority position held by around one in six voters.



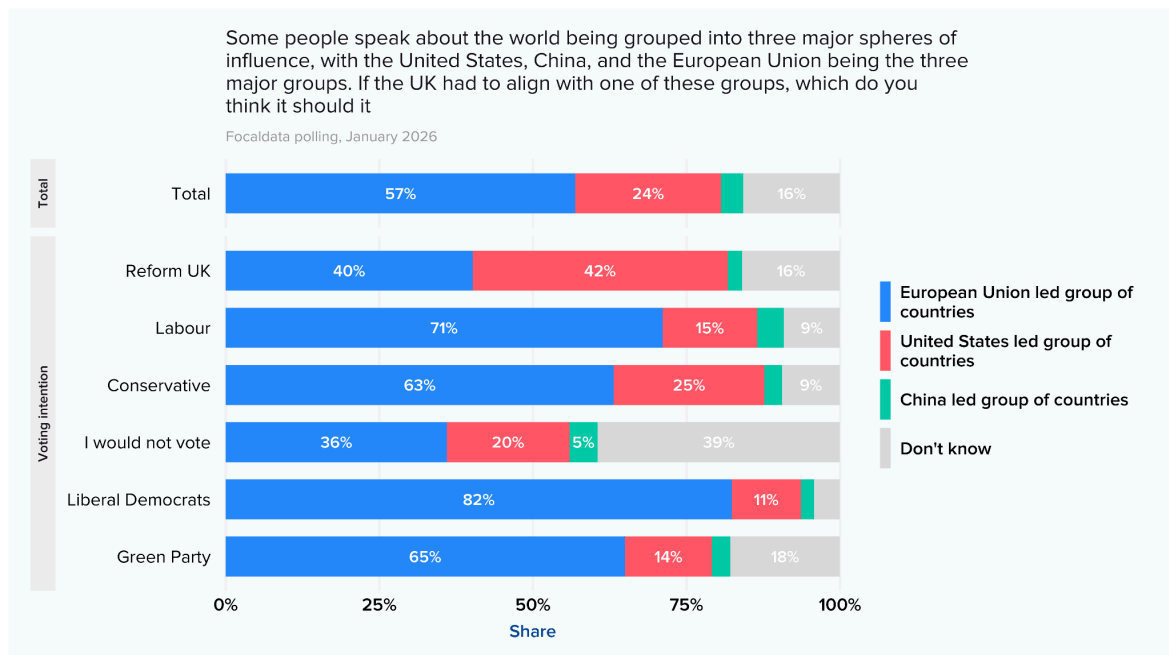


When we calculate the net appetite for closer relationships (the percentage wanting closer ties minus the percentage wanting distance), the gap is large. The EU registers +28 points while the US scores -21. Ten years on from the EU referendum, that 49-point gulf represents a fundamental reorientation in how the UK sees its position in the world. The Starmer government seems to be responding. Following many years of silence on UK-EU relations, recent Financial Times reports indicate that the UK will aim to move closer to the single market at a summit with the EU this summer.

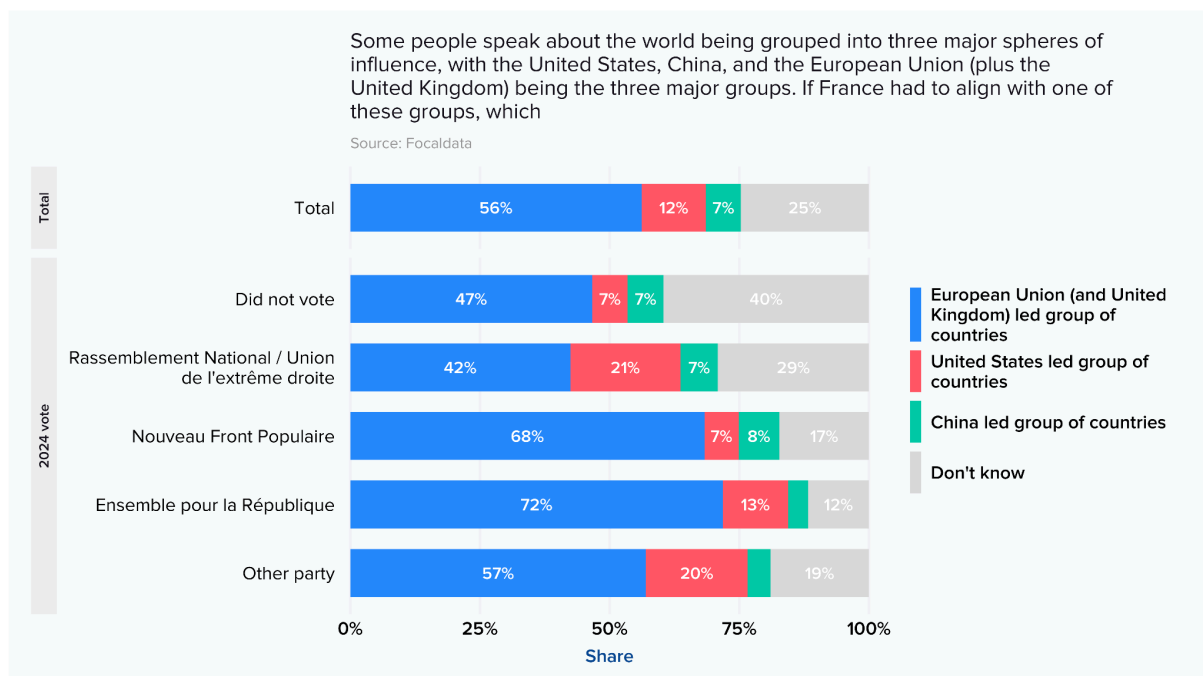
Britons would also vote to rejoin the European Union if a referendum were held today, with 45% backing rejoin and 31% supporting staying out, which turns into a decisive 18-point lead for rejoin when undecideds and non-voters are excluded. More than a third of the public say recent world events have made them more likely to support a Brexit reversal. A referendum on rejoining the EU is, of course, very unlikely in the near future, but the direction of travel is clear.



When asked to choose between the EU, US and China, the public overwhelmingly chooses to align with the European Union, including almost two-thirds of Conservative voters. Only Reform UK supporters prefer America, and even then by a narrow margin of 42% to 40%.



In France, a similar 56% back alignment with the EU and UK over the other two countries, and the US is backed by just one in eight. In contrast to the UK, none of the major parties' voters prefer alignment with the United States.



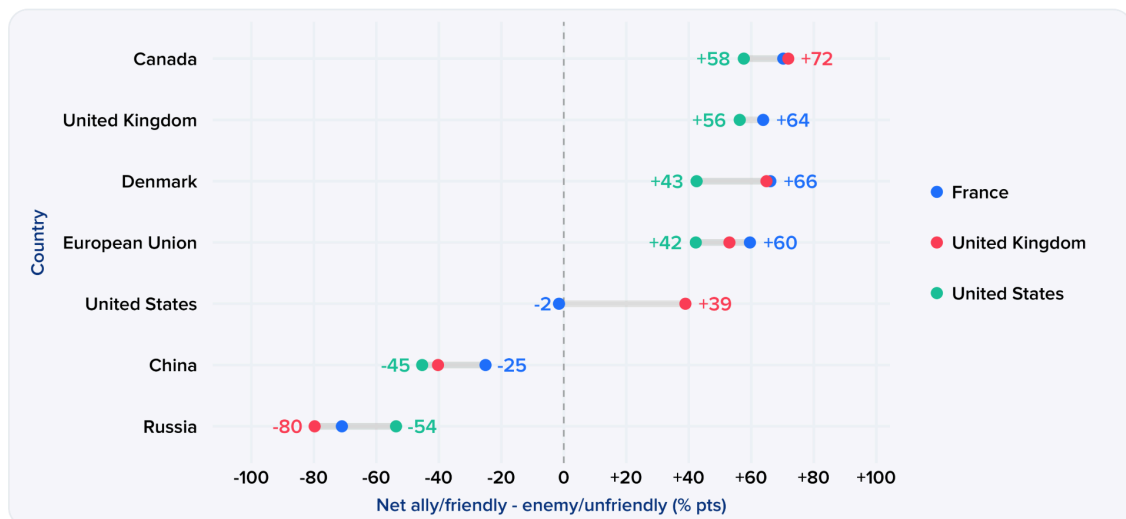
Allies and Enemies

Ambivalence over the United States extends to perceptions of alliances. While Britons still broadly view the US as a geopolitical ally (+39 net ally-enemy score, albeit down from +55 last year), French people are just as likely to say the US is an ally as they are to call them an enemy. This result marks a large collapse on when we last asked this question in 2025, with the French score dropping from +31 to -2 in less than 12 months.



French voters split on whether US is ally or enemy

NET ALLY/ENEMY SCORES BY COUNTRY



UK fieldwork 16-19 Jan 2026 with a sample size of 1,585. US fieldwork 23-26 Jan 2026 with a sample size of 2,105. France fieldwork 3 Feb 2026 with a sample size of 1,198. Results weighted to be nationally-representative by country.



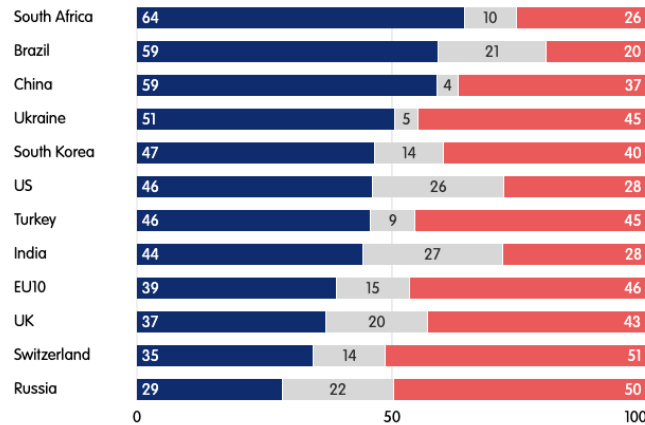
Why Europe?

Whatever the efficacy of such a venture, we have shown that current European public opinion stands firmly in favour of greater continental integration, mostly rejecting the binary tradeoff between the US and China, a move gradually being backed by their governments.

Backers of the US often make the argument that the EU is simply not powerful enough to compete with the other two powers. This is a belief held by many Europeans, as recent [ECFR](#) polling showed, though respondents in China and the US both think the EU has more capacity than Europeans think themselves.

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

- The EU is a power that can deal on equal terms with global powers, such as the US or China
- Don't know or refuse to answer
- The EU is not a power that can deal on equal terms with global powers, such as the US or China



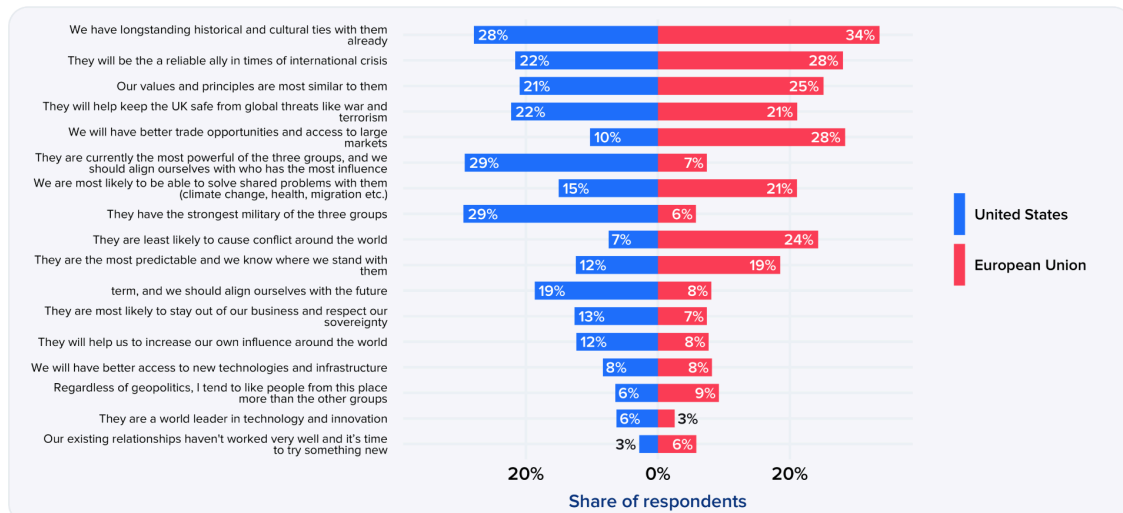
Get the data
ECFR · ecfre.eu

Those who want to make the case for alignment with the US will need to contend with the fact that strength and influence barely register in the considerations EU supporters make. In the UK, just 7% of EU backers want alignment because they think the EU is the most powerful bloc (6% in France), and only 6% choose military might as a driving factor (5% in France).

In contrast, these two options are the most selected among those who want to enhance the Special Relationship: 29% of UK-based US supporters choose 'they have the strongest military' (34% in France) and 29% select 'they are currently the most powerful' among their top three driving factors (also 29% in France).

EU preferences centre on trade, peace and reliability

MOST-SELECTED REASONS FOR PREFERRED ALIGNMENT WITH US/EU (UK SAMPLE)

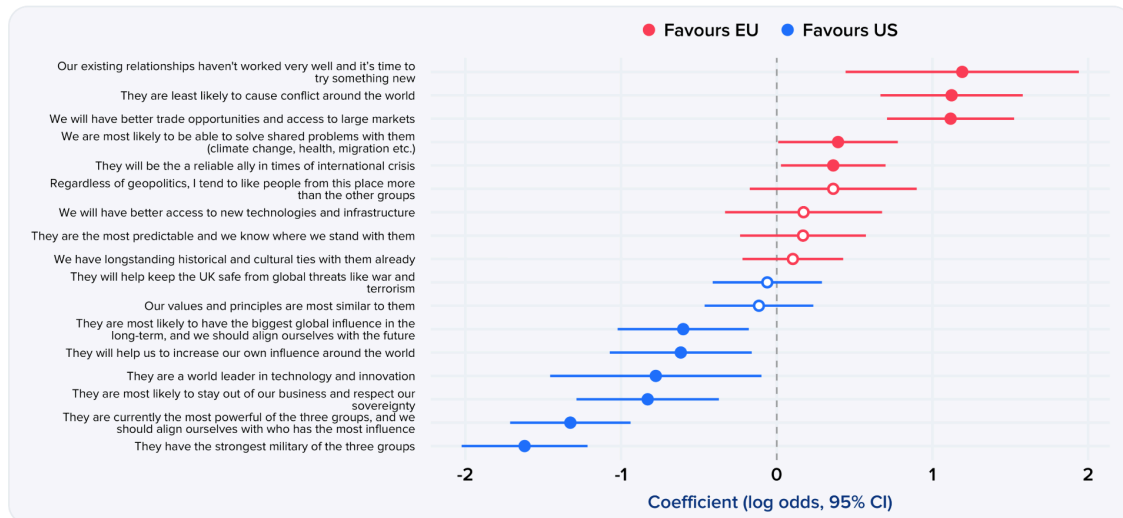


Fieldwork conducted 16 to 19 January 2026, with a sample size of 1,585 respondents. Results weighted by age, gender, region, education, ethnicity, recalled 2024 vote and political interest. Those who chose to align with China are not shown in the above chart.



EU backers are more likely to be driven by cultural ties (34% UK and 49% France), shared values (25% UK, 45% France), reliability in times of crisis (28% and 37%), trade opportunities (28% and 20%) and conflict aversion (24% and 32%).

With the EU winning majority support for preferred alignment in both the UK and France, we can conclude that even in the current climate, power, security and military strength are not currently major factors underlying the geopolitical preferences in Western Europe and who voters see as their closest allies.



Fieldwork conducted 16 to 19 January 2026, with a sample size of 1,585 respondents. Results weighted by age, gender, region, education, ethnicity, recalled 2024 vote and political interest.

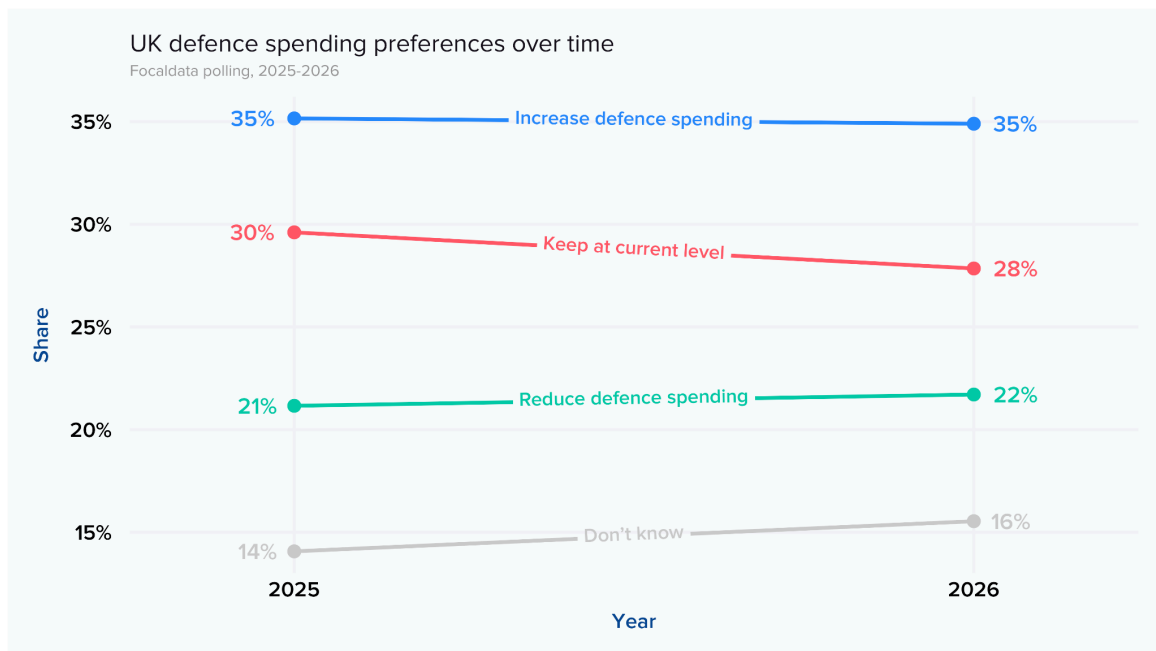


Can Defence Spending Survive a Cost-of-Living Crisis?

Further European collaboration and reducing reliance on the United States may not be free from consequence, however. NATO head Mark Rutte said recently that European leaders should 'keep on dreaming' if they thought the continent could defend itself without the United States. Some will disagree with Rutte's perhaps hyperbolic claim that defence spending would need to rise to 10% of GDP to replace US support, but few experts would deny that Europe would need to increase defence spending.

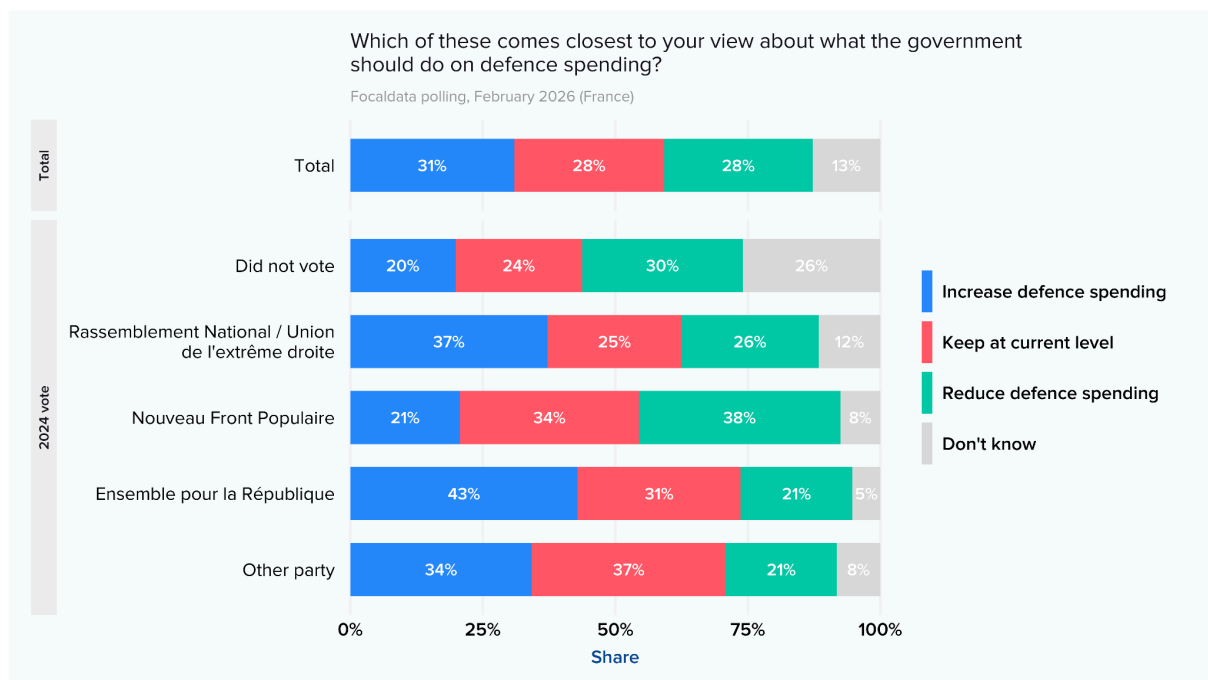
These arguments and trade-offs, however, have not yet made their way through to the public. There is little appetite for large increases in European defence budgets, so public opinion may soon face a harsh wake-up call.

British defence spending preferences have barely budged since we last polled this question in 2025. Just 35% back an increase in defence spending, unchanged from last year.



Likewise, only a third (33%) support an increase to 3.5% of GDP, actually down 3 points on when we last asked this.

In France, appetite for upping the defence budget is even lower, with just 31% favouring higher spending and 28% preferring a reduction (six points higher than the comparable UK figure).



During a cost-of-living crisis which continues to dominate public concerns, governments are struggling to make the case for large increases in defence spending. In the UK, the cost of living has



been in voters' top two most important issues for almost four years now. We see in our data across a number of policy areas that actions seen as oppositional to tackling the cost of living face a severe penalty in terms of popularity.

Whether voters would stomach further defence spending – and consequently cuts to other departments – to achieve greater security independence is a trade-off governments may struggle to balance, but an argument they may have to make.

US Public Opinion

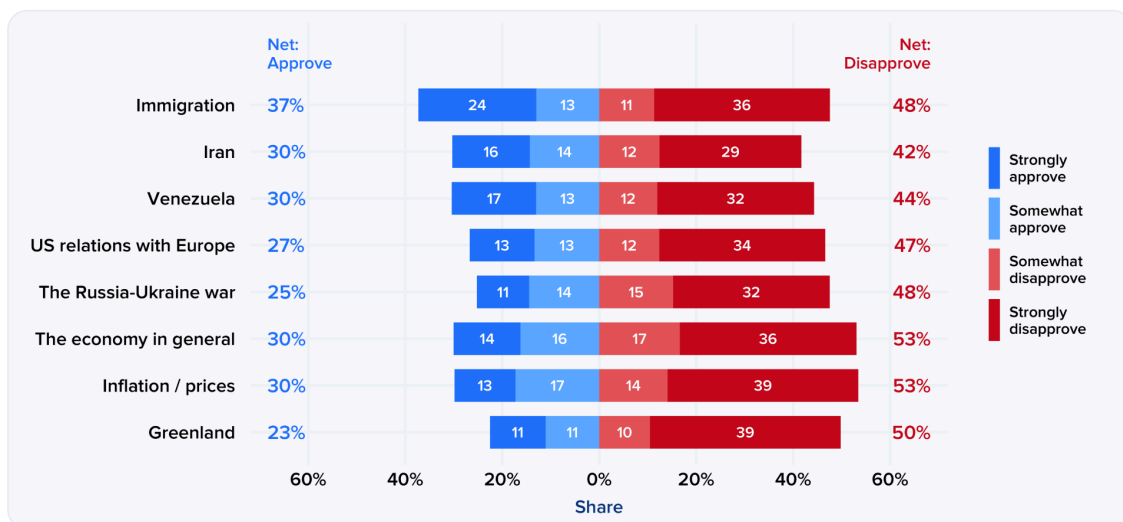
An important caveat to our analysis is that recent US actions do not appear to reflect wider public opinion. Some of Trump's more aggressive international moves are broadly unpopular with the American people, including many of his own voters.

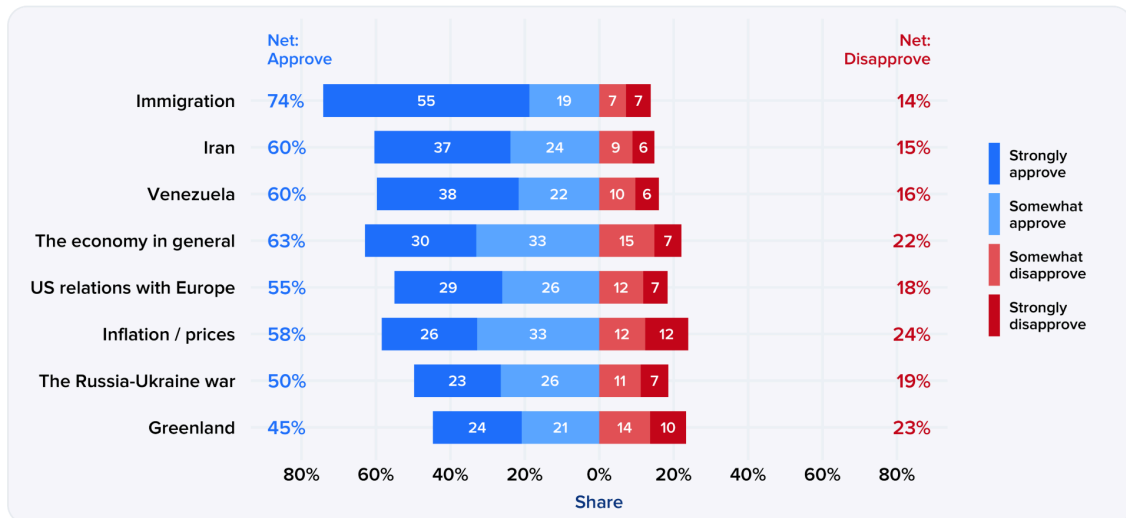
Trump's threat to annex Greenland scored his lowest net approval rating of any foreign policy issue we tested, and by 40% to 28%, American voters rejected the idea that the United States 'needs to own Greenland because European countries, including Denmark, cannot adequately defend it'.

When asked to rate Trump's handling of Greenland specifically, his net approval stands at -27 points, significantly worse than his handling of Iran (-12) or Venezuela (-14). When it comes to actions relating to European allies, public opinion takes a nosedive. He holds a net approval rating of -20 for US relations with Europe, and his handling of the Russia-Ukraine war is at -23. Strikingly, almost a quarter of Trump's 2024 voters disapprove of his handling of Greenland.



Americans disapprove of Trump's geopolitics handling DONALD TRUMP PRESIDENTIAL APPROVAL BY ISSUE (NATIONAL)





Fieldwork conducted 23 to 26 January 2026, with a sample size of 2,105 respondents. Results weighted by age, gender, region, education, ethnicity, recalled 2024 vote, recalled 2020 vote, household income and political interest. Those who answered "Unsure / Neither approve nor disapprove" are not shown in the above chart.



Recent US actions are at odds with national public opinion, which could bring political consequences in November's midterm elections. Trump won the 2024 election, but public opinion is shifting against the government's actions on several policy areas, including geopolitics. Strong unilateralism or potential conflict with allies are simply not backed by most voters.

In assessing their future actions, European leaders will be making a calculated decision on whether the America First vision of foreign policy merely represents a temporary diversion from US global strategy, or whether it will be continued by a successor in Trump's image, marking a fundamental and long-lasting realignment of the global order.

Conclusion

The data paint a clear picture that the geopolitical centre of gravity is shifting away from the United States under its current administration and European public opinion is beginning to consolidate around a third-sphere model.

Three major findings emerge from our research:

1. The 'Jenga tower' is wobbling. Analysing decades of UN voting data reveals that US global influence is structurally fragile and reliant on a tight European bloc that is moving away from its transatlantic allies. The entire architecture of American global influence could shift dramatically if Europe continues to be alienated. In contrast, China operates a 'beehive model', in which influence is diffuse and unlikely to collapse from individual rifts.
2. Europe has broad public support for greater strategic autonomy. Majorities in the UK would prefer to align with the EU over the United States or China, with preferences driven by trade and shared values rather than perceptions of military strength or global influence.
3. Defence spending remains a binding constraint. Europeans say they want autonomy from the United States, but are less willing to pay for it. Until public opinion shifts on defence budgets in the context of an ongoing cost-of-living crisis, European governments overseeing increasingly unforgiving electorates may struggle to reshape the global order in line with public preferences.

We stand at an inflection point in the international order. The transatlantic alliance is at its weakest point in decades, and Europe is seeking greater continental collaboration. Whether this third sphere can materialise may depend on Europe's ability to reconcile its desire for autonomy with the fiscal and political realities of achieving it.



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