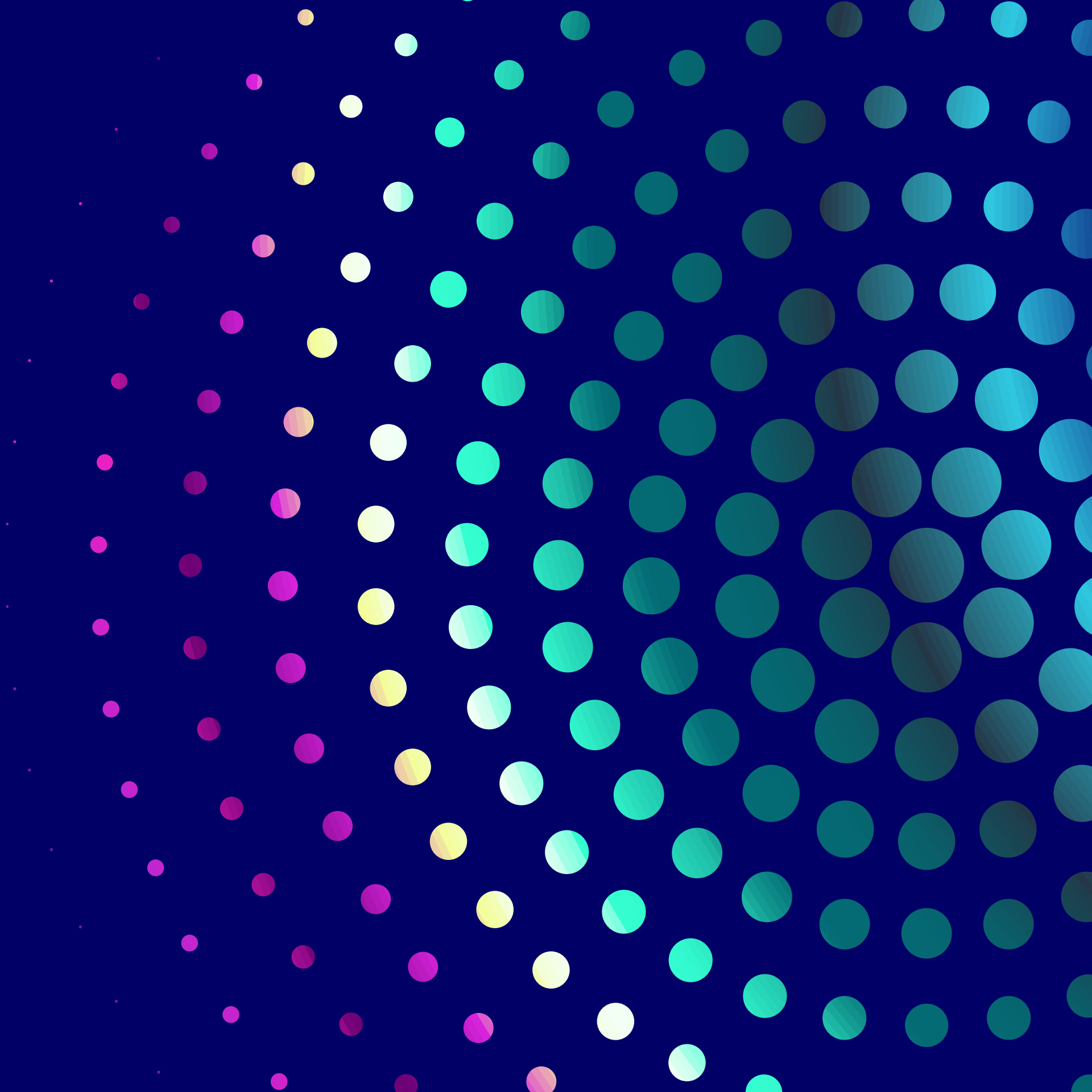ie UNIVERSITY

CENTER FOR THE
GOVERNANCE OF
CHANGE

2025 EUROPEAN TECH INSIGHTS

INTRODUCTION

As 2025 draws to a close, the pace and complexity of global change continue to reshape how Europeans perceive technology, power, and the future of the continent. Technological shifts have unfolded amid a turbulent geopolitical backdrop. U.S.–China rivalry has intensified while diplomacy and trade have grown increasingly transactional. In Europe, defense spending — once politically sensitive — is now mainstream policy debate, with NATO members committing to higher budgets and the European Union presenting its Defense Readiness Roadmap.

At the same time, Europe has had to confront another challenge: how to regain its economic and technological edge. Building on the analyses presented in the Draghi and Letta reports, the European Commission is now prioritizing competitiveness to achieve the scale, productivity, and investment speed required to compete with global powers. Areas such as AI, energy, digital infrastructure, defense, biotech, or advanced manufacturing will be central to this effort, shaping the continent's capacity to innovate and assert leadership in the next decade.

This year's edition of European Tech Insights captures how Europeans are embracing technological progress while remaining true to their social and human values. Findings show growing support for Europe's technological and defense sovereignty, stronger calls for a firm stance toward the United States and Tech firms, and a notable rise in openness to China. Time and again, Europeans express support for technological advancement if it reinforces security, inclusion, and social welfare; and resistance when change feels imposed, unaccountable, or misaligned with the values that define their societies.

Artificial intelligence is no longer seen as an emerging tool but rather as an ever-present companion — supporting our work, assisting in education, and increasingly stepping into deeply human domains such as emotional support and cognitive guidance. At the same time, concerns among Europeans about its long-term effects on cognition, social cohesion, and diversity have grown, with some fearing cultural homogenization and human dependency.

At IE University, we remain committed to fostering a rigorous and inclusive dialogue about the future of technology. Our mission is to educate leaders capable of understanding the complexity of these transformations and guiding them responsibly. As Europe reflects on a year of profound technological and geopolitical shifts, understanding public attitudes remains essential to building the foresight and institutional capacity required for the decades ahead. The insights in this report offer a grounded perspective on the preferences and concerns that will continue to shape Europe's path forward.

Diego del Alcazar Benjumea,
CEO of IE University. Chair, IE CGC

Manuel Muñiz,
Provost of IE University. Chair, IE CGC
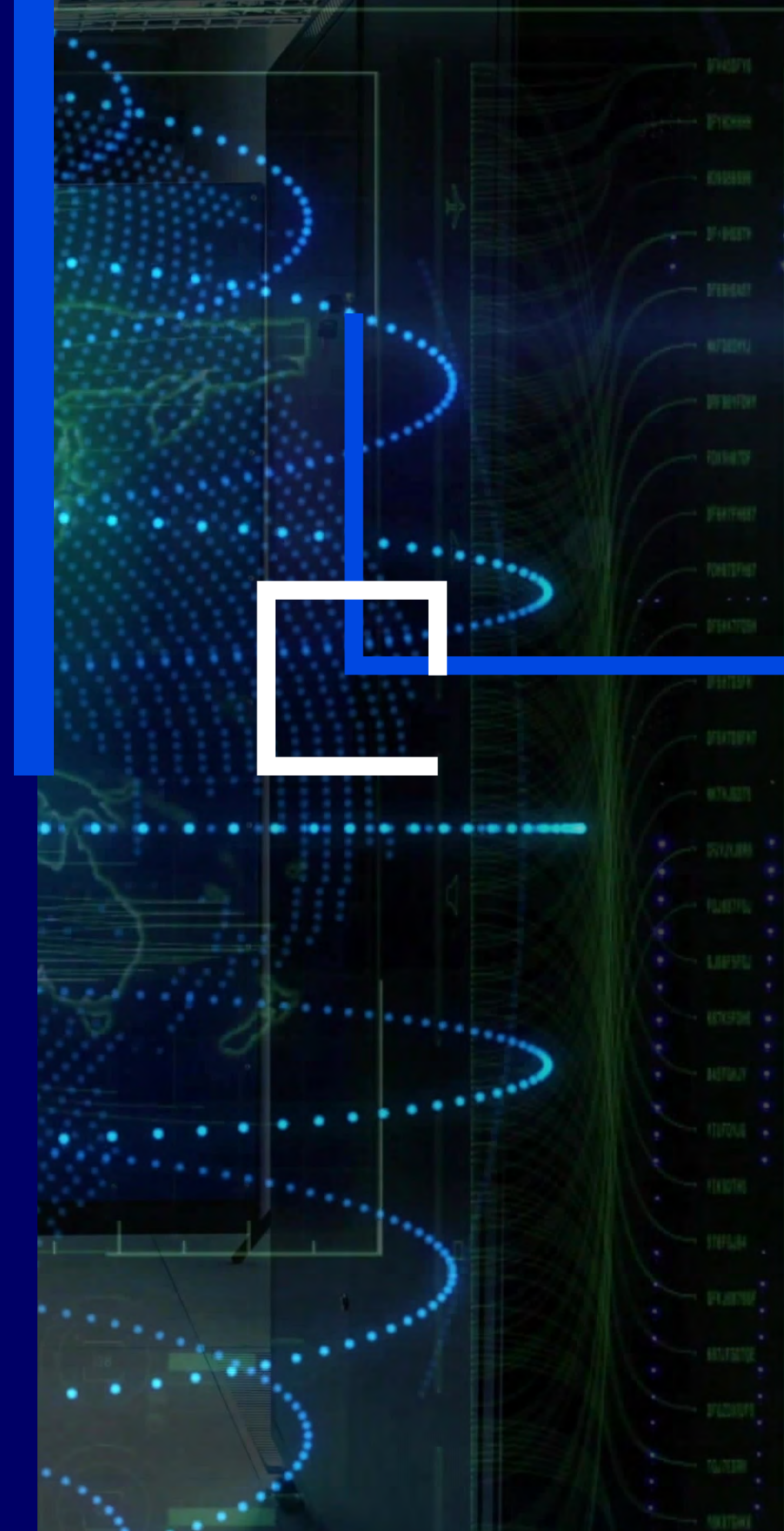
KEY HIGHLIGHTS

#1
EUROPEANS WANT TECHNOLOGICAL PROGRESS, BUT NOT AT ANY COST

While competitiveness dominates Europe's political agenda, it ranks low among citizens' priorities. Only **22%** see it as Europe's top technological goal, compared with **42%** who prioritize safety and resilience and **36%** who favor inclusion. The same logic applies to AI investment to stay competitive: around **71%** of Europeans would rather see public funds allocated to priorities such as education and healthcare. For citizens, technological progress must serve social welfare — not compete with it.

#2
ALLIED BUT NOT ALIGNED

In a context of geopolitical rivalry, a clear majority of Europeans continue to prefer alignment with the United States over China, yet the share favoring Beijing is rising sharply — up 15 points since 2023. At the same time, almost four in ten Europeans favor standing firm and pushing back against U.S. and Big Tech pressure. Together, these attitudes suggest a Europe that still sees Washington as a partner but more cautiously than in the past.

#3
THE AGE OF EUROPEAN AUTONOMY

Support for defense and technological sovereignty is no longer confined to political rhetoric; it has become part of public sentiment. A large share of Europeans (**47%**) would accept higher defense spending even if it meant cuts to social programs. Most citizens also prefer European-made security technologies (**63%**), even at a higher price, and almost three in four (**72%**) want sensitive data stored only on European servers. Europeans appear increasingly willing to prioritize self-reliance and security over economic convenience or global openness.

#4
AI MEETS A WALL OF SKEPTICISM

Across the areas that touch everyday life, Europeans show reluctance to hand over meaningful decisions to artificial systems. A strong majority oppose the use of AI in their children's education (**77%**), would not trust AI to manage their personal finances (**81%**), and overwhelmingly prefer an imperfect human boss to a flawless AI (**90%**). Furthermore, almost half of European citizens fear that AI could threaten their employment or income. Together, these findings constitute signs of growing distrust of automation in contexts that involve care, judgment, or responsibility.

1

EUROPE'S
TECHNOLOGICAL
IDENTITY

#01

EUROPE'S TECHNOLOGICAL IDENTITY

■ **More Europeans believe that technological change is occurring too fast (32.7%) than too slow (19.9%) → *Figure 1.***

■ In Spain and the United Kingdom, this perception is even stronger, with over 40% of respondents saying that technological change is occurring too quickly, while Germans stand out as the most likely to believe that change is progressing too slowly (42%) → *Figure 2.*
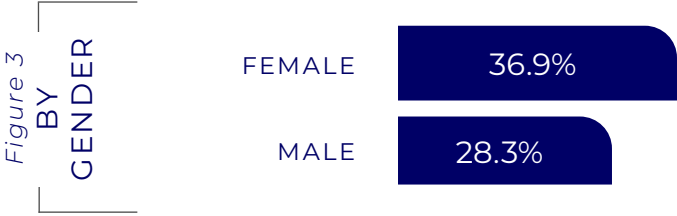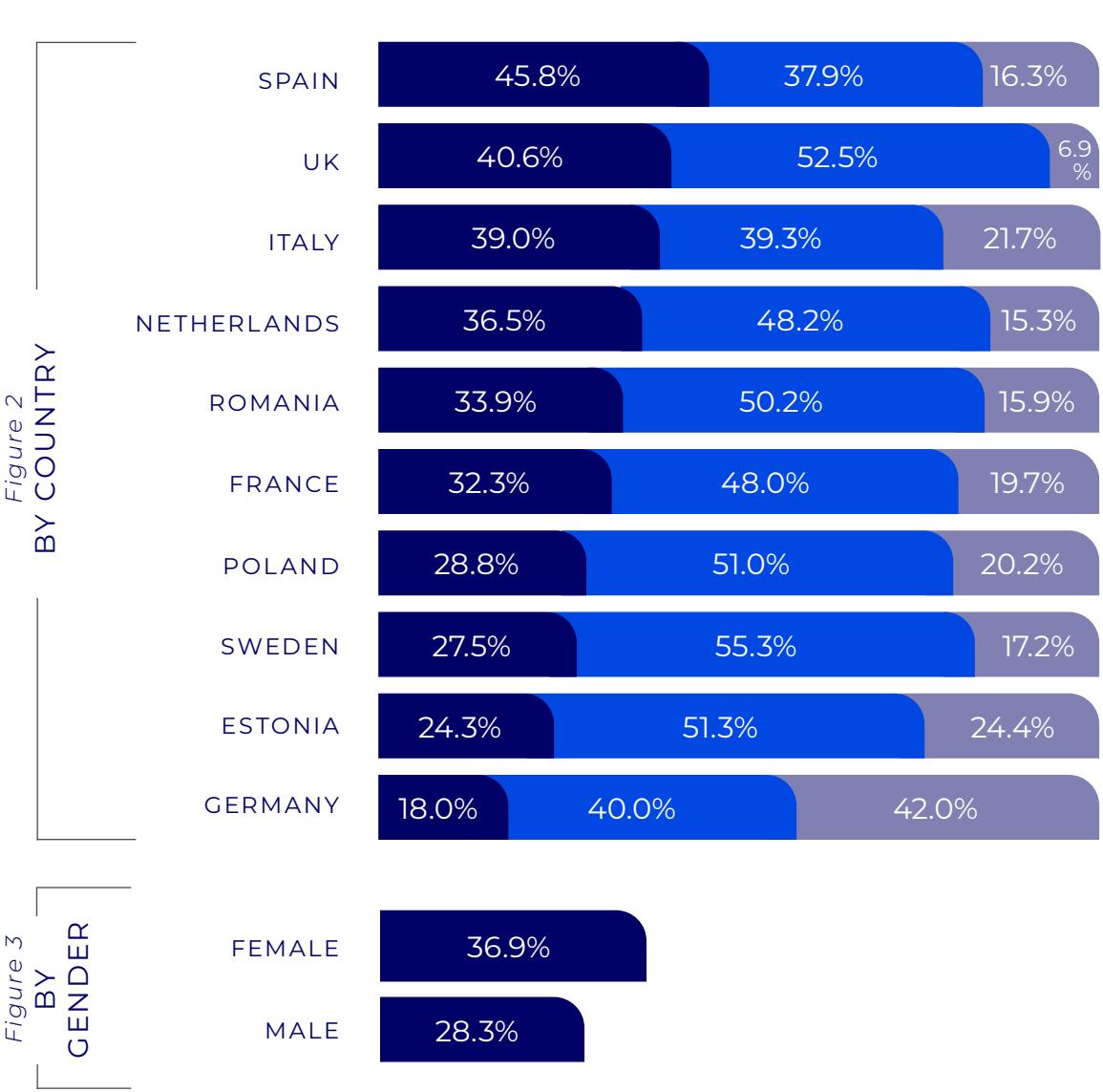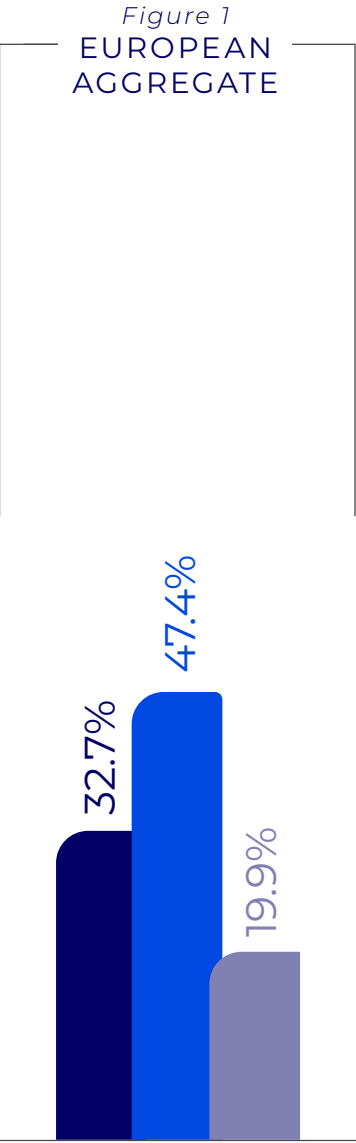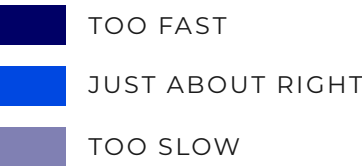
■ Women are more likely than men to perceive technological progress as happening too fast (36.9% vs. 28.3%) → *Figure 3.*

■ Nearly half of those with only basic education (46.2%) consider technological change too rapid, compared with just over one in four (25.5%) among those with advanced degrees → *Figure 4.*

QUESTION: Do you feel technological change in Europe is happening too fast, too slow or at just about the right pace?
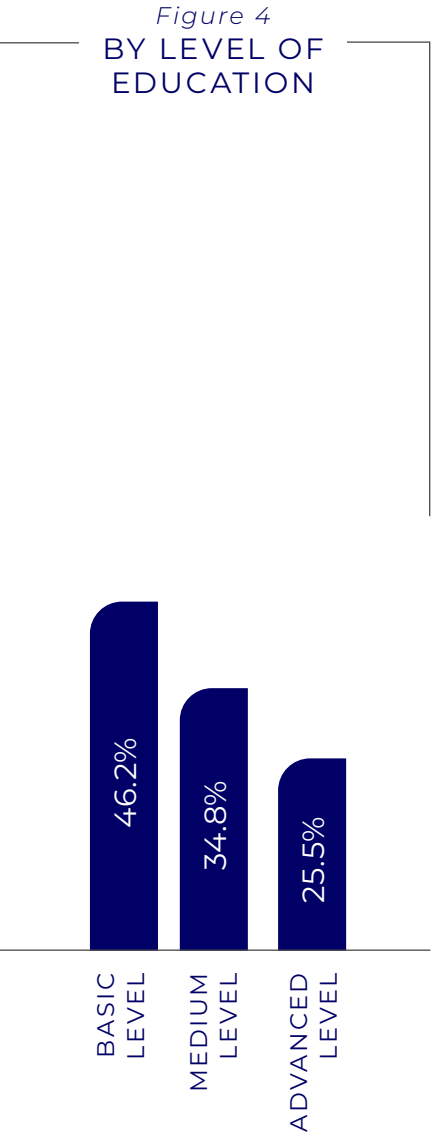
■ TOO FAST
■ JUST ABOUT RIGHT
■ TOO SLOW

Figure 1
EUROPEAN AGGREGATE

32.7%
47.4%
19.9%

Figure 2
BY COUNTRY

	TOO FAST	JUST ABOUT RIGHT	TOO SLOW
SPAIN	45.8%	37.9%	16.3%
UK	40.6%	52.5%	6.9%
ITALY	39.0%	39.3%	21.7%
NETHERLANDS	36.5%	48.2%	15.3%
ROMANIA	33.9%	50.2%	15.9%
FRANCE	32.3%	48.0%	19.7%
POLAND	28.8%	51.0%	20.2%
SWEDEN	27.5%	55.3%	17.2%
ESTONIA	24.3%	51.3%	24.4%
GERMANY	18.0%	40.0%	42.0%

Figure 3
BY GENDER

FEMALE	36.9%
MALE	28.3%

Figure 4
BY LEVEL OF EDUCATION

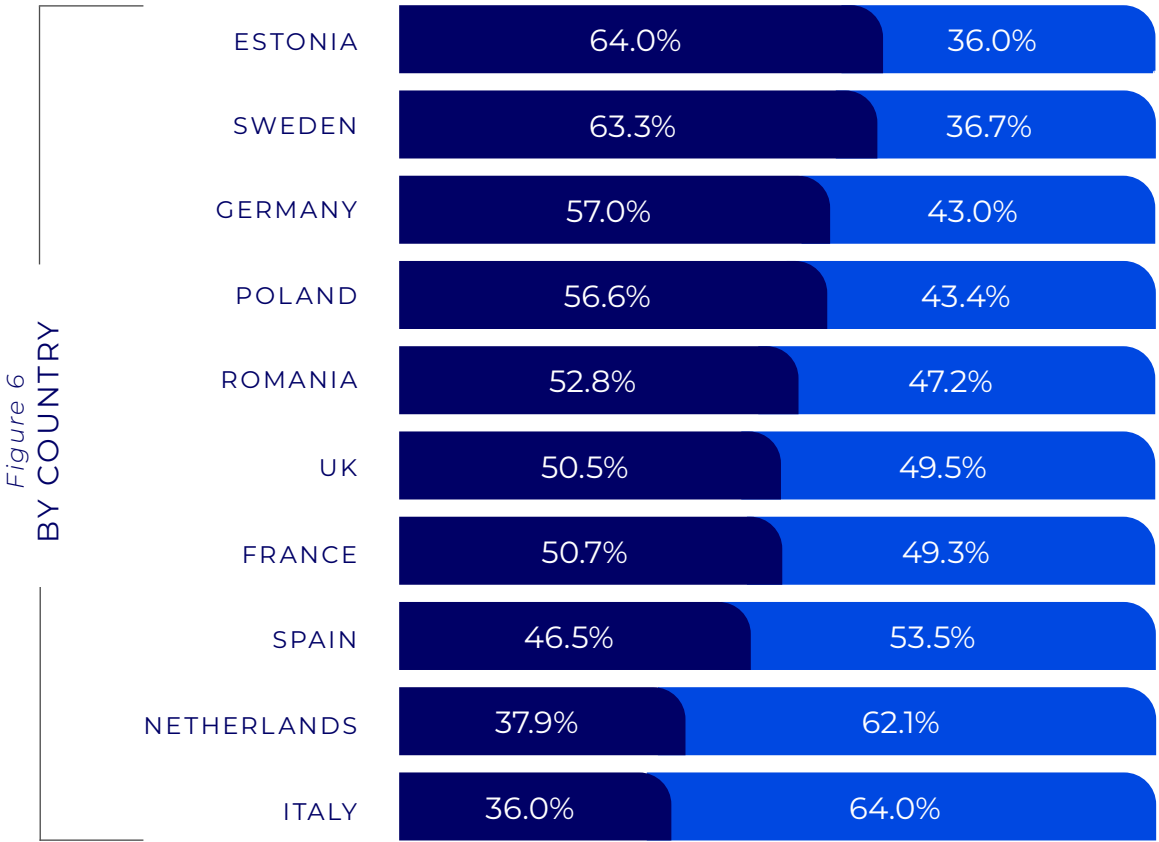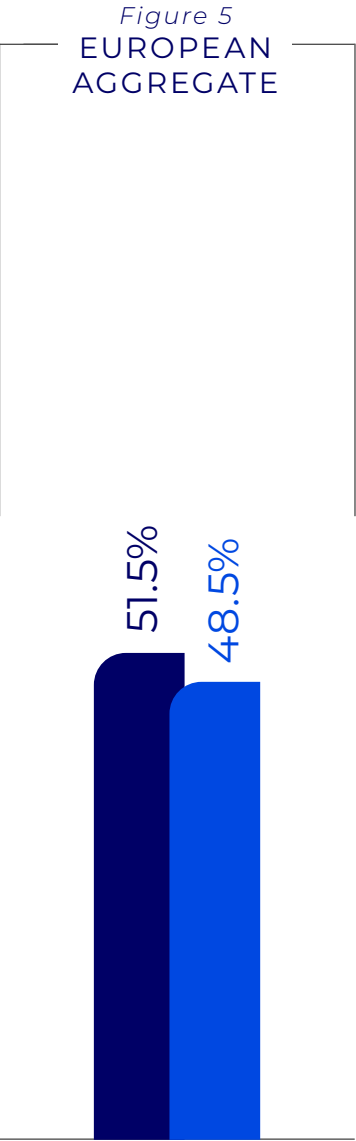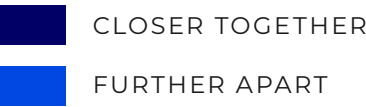|	
BASIC LEVEL	46.2%
MEDIUM LEVEL	34.8%
ADVANCED LEVEL	25.5%

EUROPE'S TECHNOLOGICAL IDENTITY

- **Almost half of Europeans (48.5%) believe that technology will drive people further apart → *Figure 5*.**

- This concern is particularly strong in Italy (64%) and the Netherlands (62.1%) → *Figure 6*.

- By contrast, Estonia (64%) and Sweden (63.3%) are the most optimistic, with majorities believing that technology will bring people closer together → *Figure 6*.

QUESTION: Do you think new technologies will bring Europeans closer together or further apart from each other?

■ CLOSER TOGETHER

■ FURTHER APART

Figure 5
EUROPEAN AGGREGATE

51.5% 48.5%

Figure 6
BY COUNTRY

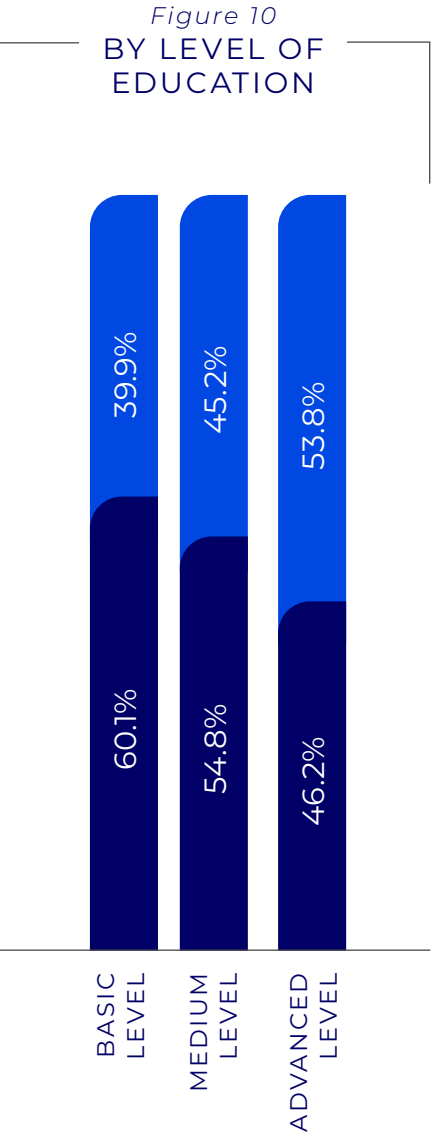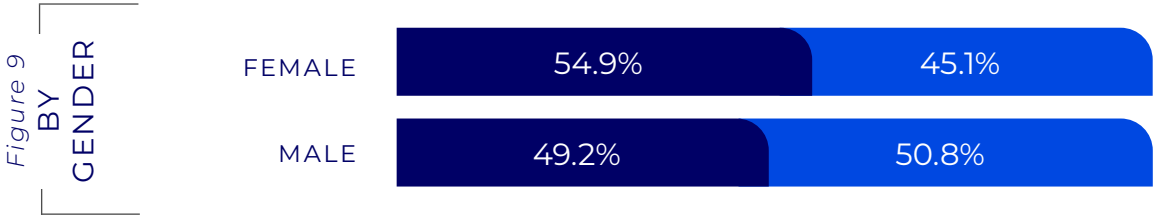| Country	Closer Together	Further Apart
ESTONIA	64.0%	36.0%
SWEDEN	63.3%	36.7%
GERMANY	57.0%	43.0%
POLAND	56.6%	43.4%
ROMANIA	52.8%	47.2%
UK	50.5%	49.5%
FRANCE	50.7%	49.3%
SPAIN	46.5%	53.5%
NETHERLANDS	37.9%	62.1%
ITALY	36.0%	64.0%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

- **European countries are divided between those who prioritize cultural and traditional heritage and those who favor innovation in shaping Europe's future identity** → *Figure 7*.

- In the United Kingdom, Spain, and France, around 60% of citizens lean toward preserving cultural and traditional heritage, while Romania, Germany, Sweden, and Estonia are the only countries where a majority favors innovation over tradition → *Figure 8*.

- Women tend to place greater emphasis on preserving Europe's cultural heritage, whereas men are slightly more inclined to prioritize innovation → *Figure 9*.

- People with a basic level of education are the most likely to prioritize tradition → *Figure 10*.

QUESTION: When you think about Europe's future identity, what do you think we should prioritize and strengthen?

■ THE CONTINUITY OF EUROPE'S CULTURAL AND TRAIDTIONAL HERITAGE

■ THE SPIRIT OF INNOVATION AND PROGRESS

Figure 7
EUROPEAN AGGREGATE

52.2% 47.8%

Figure 8
BY COUNTRY

	Heritage	Innovation
UK	60.7%	39.3%
SPAIN	60.1%	39.9%
FRANCE	59.7%	40.3%
NETHERLANDS	57.8%	42.2%
ITALY	57.0%	43.0%
POLAND	54.6%	45.4%
ESTONIA	46.7%	53.3%
SWEDEN	44.4%	55.6%
GERMANY	40.7%	59.3%
ROMANIA	39.9%	60.1%

Figure 9
BY GENDER

	Heritage	Innovation
FEMALE	54.9%	45.1%
MALE	49.2%	50.8%

Figure 10
BY LEVEL OF EDUCATION

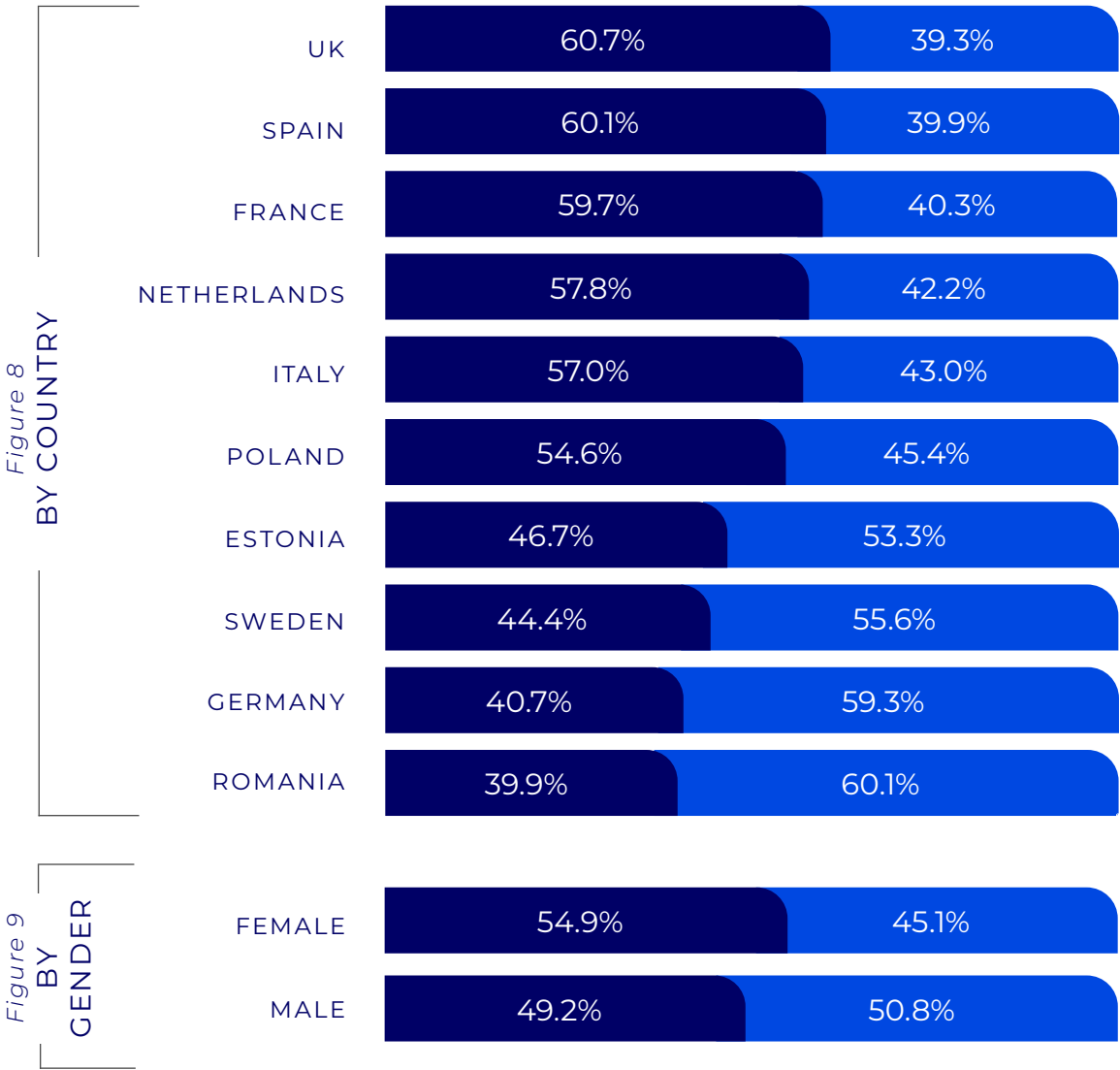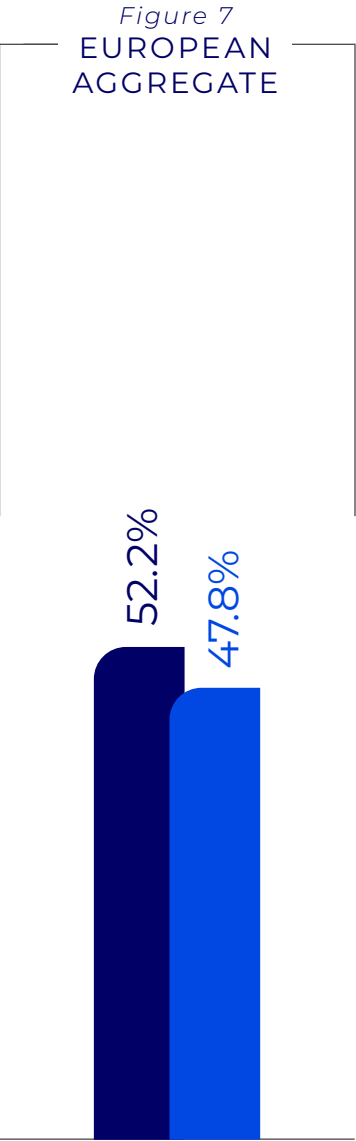|	Innovation	Heritage
BASIC LEVEL	39.9%	60.1%
MEDIUM LEVEL	45.2%	54.8%
ADVANCED LEVEL	53.8%	46.2%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
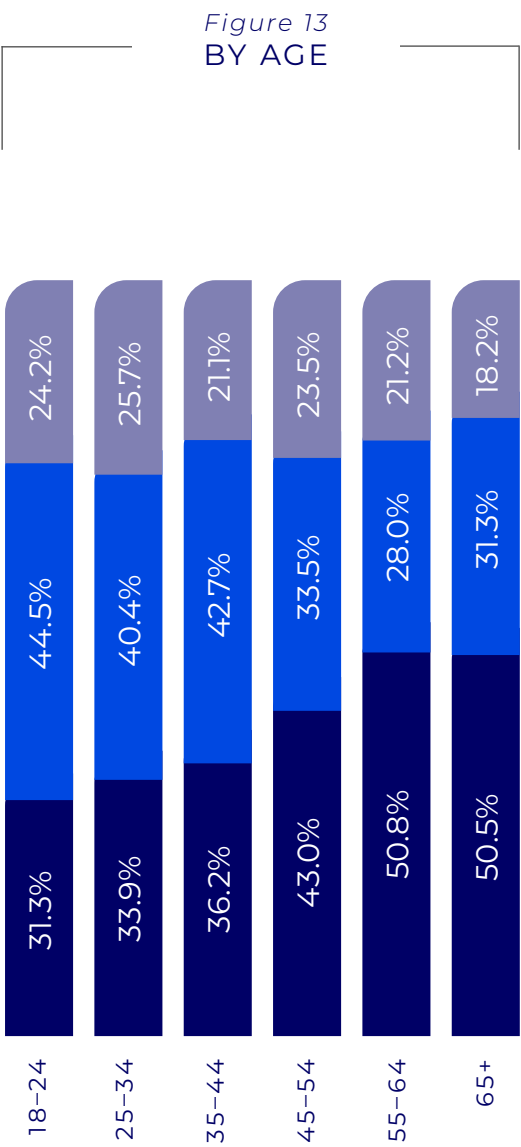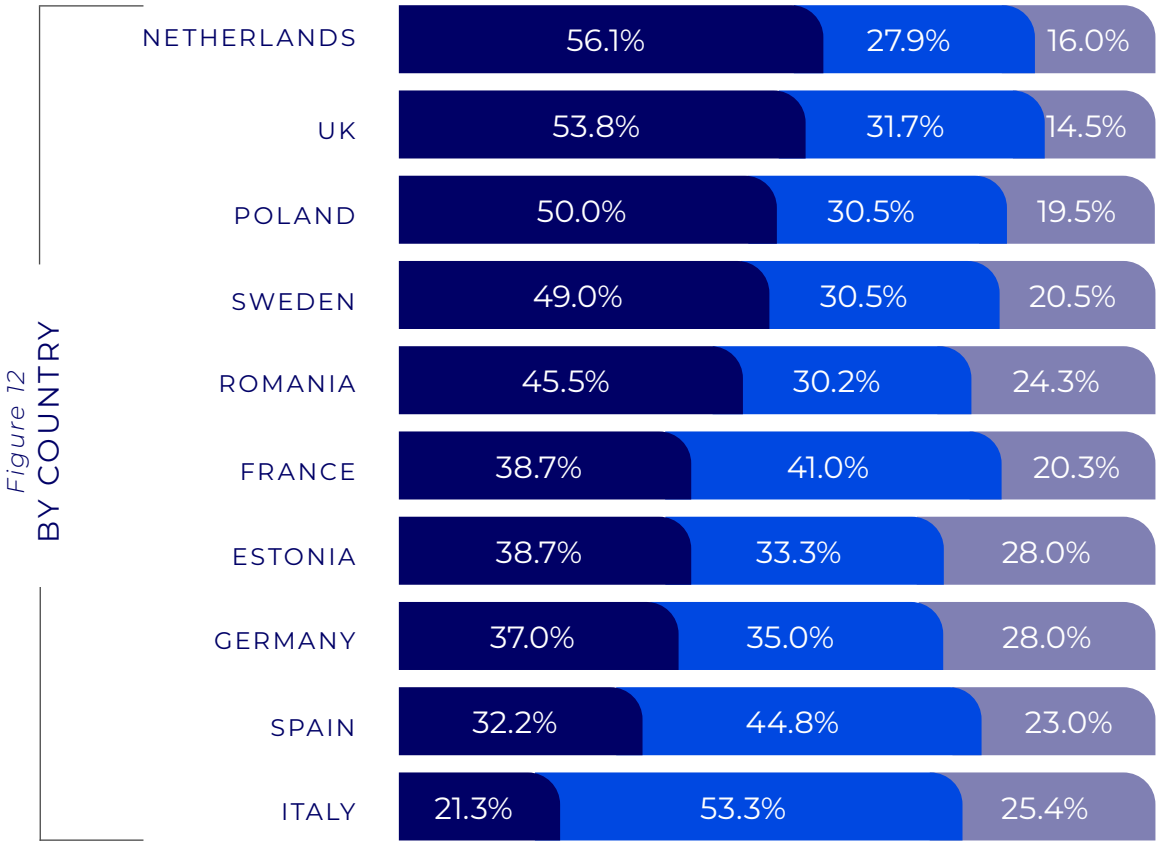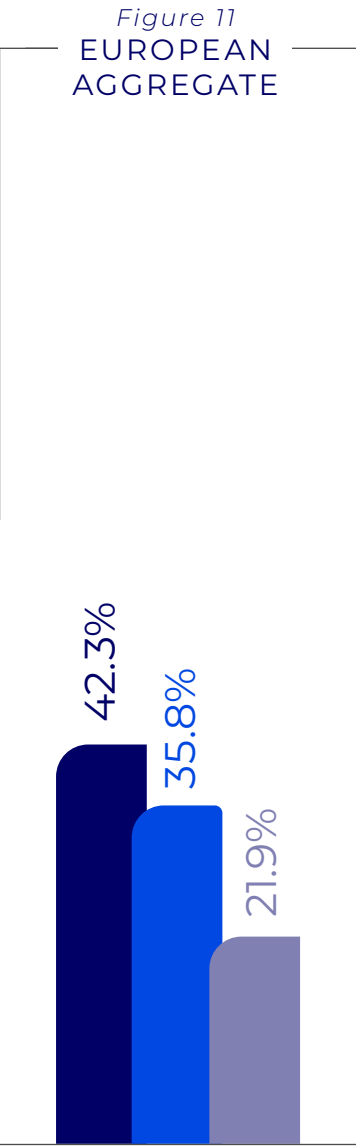
EUROPE'S TECHNOLOGICAL IDENTITY

- **Only one in five Europeans believe that competitiveness should be Europe's top technological priority. Instead, citizens place greater emphasis on safety and resilience (42.3%) and social inclusion (35.8%) → Figure 11.**

- Italy (53.3%) and Spain (44.8%) are the only two countries where a majority of citizens favor inclusion over security and competitiveness → *Figure 12*.

- Europe's younger generations (aged 44 and under) are most concerned with making the digital transition inclusive, while security is the top priority for those aged 45 and above → *Figure 13*.

QUESTION: When it comes to Europe's technological future, which goal matters most to you?

BEING SECURE: EUROPE IS SAFE AND RESILIENT IN THE FACE OF GEOPOLITICAL THREATS

BEING INCLUSIVE: THE DIGITAL TRANSITION BENEFITS ALL AND NO ONE IS LEFT BEHIND

BEING COMPETITIVE: EUROPE LEADS GLOBALLY IN TECHNOLOGY AND INNOVATION

Figure 11
EUROPEAN AGGREGATE

42.3% 35.8% 21.9%

Figure 12
BY COUNTRY

	Being Secure	Being Inclusive	Being Competitive
NETHERLANDS	56.1%	27.9%	16.0%
UK	53.8%	31.7%	14.5%
POLAND	50.0%	30.5%	19.5%
SWEDEN	49.0%	30.5%	20.5%
ROMANIA	45.5%	30.2%	24.3%
FRANCE	38.7%	41.0%	20.3%
ESTONIA	38.7%	33.3%	28.0%
GERMANY	37.0%	35.0%	28.0%
SPAIN	32.2%	44.8%	23.0%
ITALY	21.3%	53.3%	25.4%

Figure 13
BY AGE

	18–24	25–34	35–44	45–54	55–64	65+
Being Competitive	24.2%	25.7%	21.1%	23.5%	21.2%	18.2%
Being Inclusive	44.5%	40.4%	42.7%	33.5%	28.0%	31.3%
Being Secure	31.3%	33.9%	36.2%	43.0%	50.8%	50.5%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

EUROPEAN TECH INSIGHTS **2025**

9

2
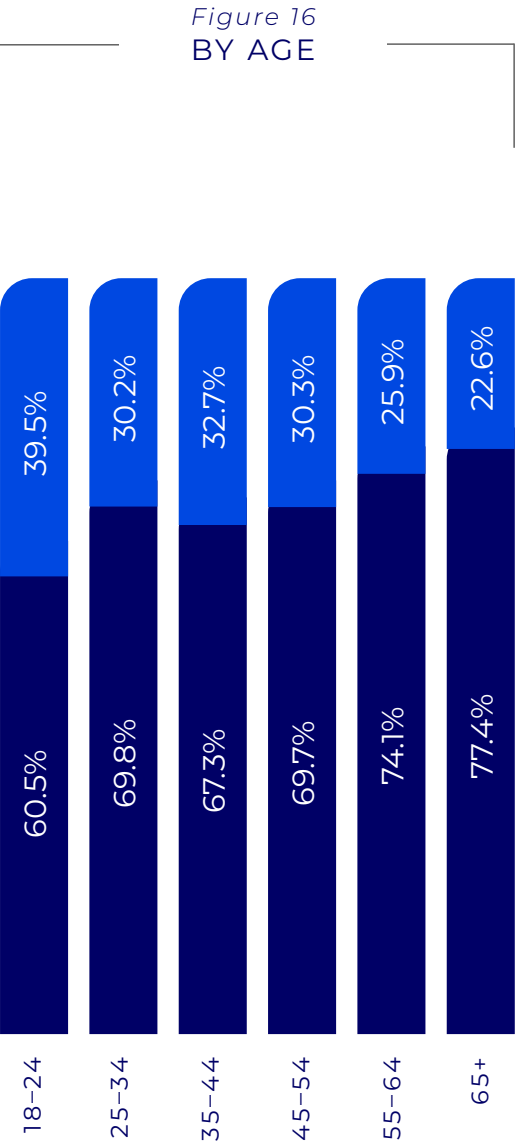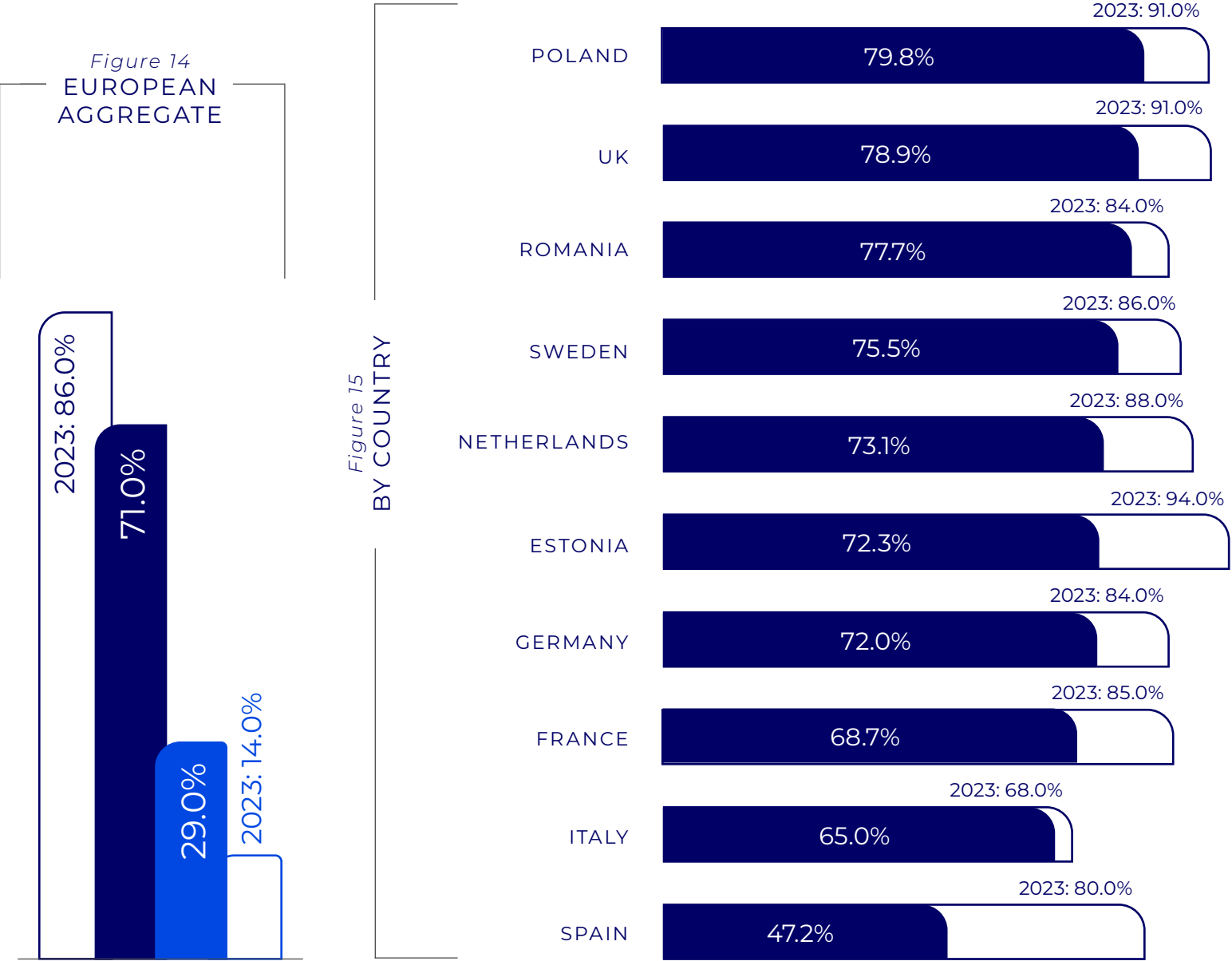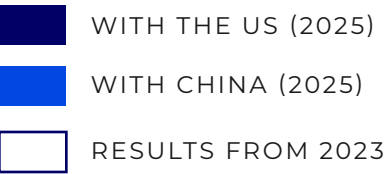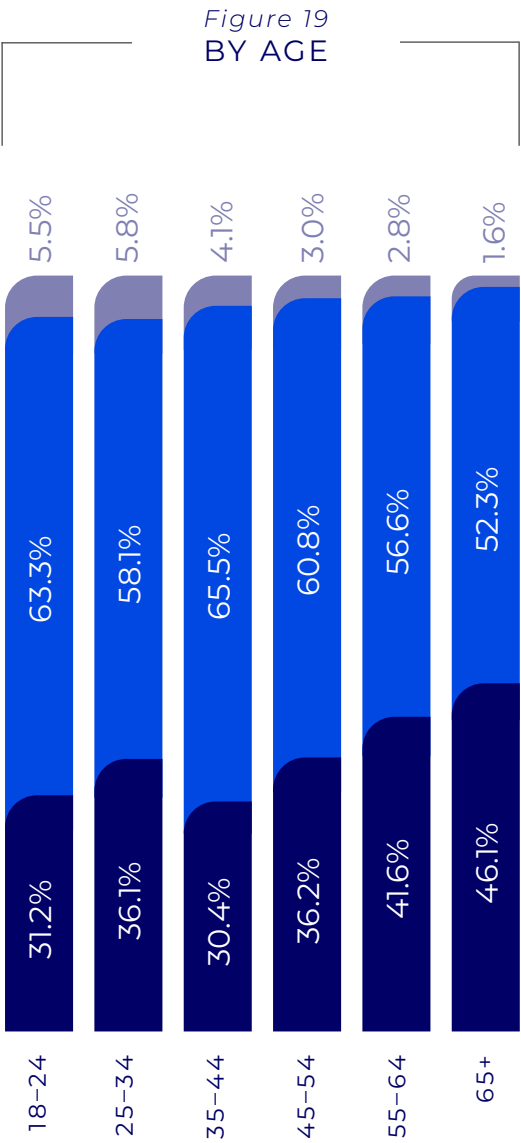
THE EU IN THE GLOBAL TECH RACE

#05

THE EU IN THE GLOBAL TECH RACE

- **Support for aligning with China has grown significantly, with almost one in three Europeans (29%) now favoring Beijing over Washington → *Figure 14*.**

- Compared with the 2023 survey results, the share of citizens who want Europe to side with the US has decreased in every surveyed country → *Figure 15*. By contrast, support for siding with China has increased by roughly 15 points → *Figure 14*.

- This preference is particularly strong in Spain, where a majority now support siding with China (52.8%), followed by Italy (35%) and France (31.3%) → *Figure 15*.

- Younger Europeans are especially likely to favor alignment with China, with nearly 40% of those aged 18 to 24 expressing this preference → *Figure 16*.

WITH THE US (2025)

WITH CHINA (2025)

RESULTS FROM 2023

Figure 14
EUROPEAN AGGREGATE

2023: 86.0%
71.0%
29.0%
2023: 14.0%

Figure 15
BY COUNTRY

Country	2025	2023
POLAND	79.8%	2023: 91.0%
UK	78.9%	2023: 91.0%
ROMANIA	77.7%	2023: 84.0%
SWEDEN	75.5%	2023: 86.0%
NETHERLANDS	73.1%	2023: 88.0%
ESTONIA	72.3%	2023: 94.0%
GERMANY	72.0%	2023: 84.0%
FRANCE	68.7%	2023: 85.0%
ITALY	65.0%	2023: 68.0%
SPAIN	47.2%	2023: 80.0%

Figure 16
BY AGE

Age	With China	With US
18-24	39.5%	60.5%
25-34	30.2%	69.8%
35-44	32.7%	67.3%
45-54	30.3%	69.7%
55-64	25.9%	74.1%
65+	22.6%	77.4%

EUROPEAN TECH INSIGHTS **2025**

THE EU IN THE GLOBAL TECH RACE

- **Most Europeans (58.6%) believe that Europe should seek a middle ground, while nearly four in ten (37.9%) think the EU should stand firm and push back against the Trump Administration and Big Tech threats → *Figure 17*.**

- Support for pushing back is strongest in Sweden (48.5%) and Spain (47.2%), whereas Poland (74.8%) and Romania (72.4%) overwhelmingly favor finding a middle ground → *Figure 18*.

- Older respondents are more likely than younger ones to support a confrontational stance → *Figure 19*.

QUESTION: How should Europe respond to threats from the Trump Administration and Big Tech executives in the fields of trade and technology?

- STAND FIRM AND PUSH BACK
- TRY TO FIND A MIDDLE GROUND
- GIVE IN TO AVOID CONFRONTATION

Figure 17
EUROPEAN AGGREGATE

37.9% | 58.6% | 3.5%

Figure 18
BY COUNTRY

Country	Stand firm	Middle ground	Give in
SWEDEN	48.3%	49.0%	2.7%
SPAIN	47.2%	48.8%	4.0%
FRANCE	45.7%	48.3%	6.0%
GERMANY	42.7%	53.0%	4.3%
UK	39.9%	58.4%	1.7%
NETHERLANDS	37.5%	58.8%	3.7%
ESTONIA	35.0%	61.0%	4.0%
ITALY	35.0%	61.0%	4.0%
ROMANIA	24.6%	72.4%	3.0%
POLAND	23.2%	74.8%	2.0%

Figure 19
BY AGE

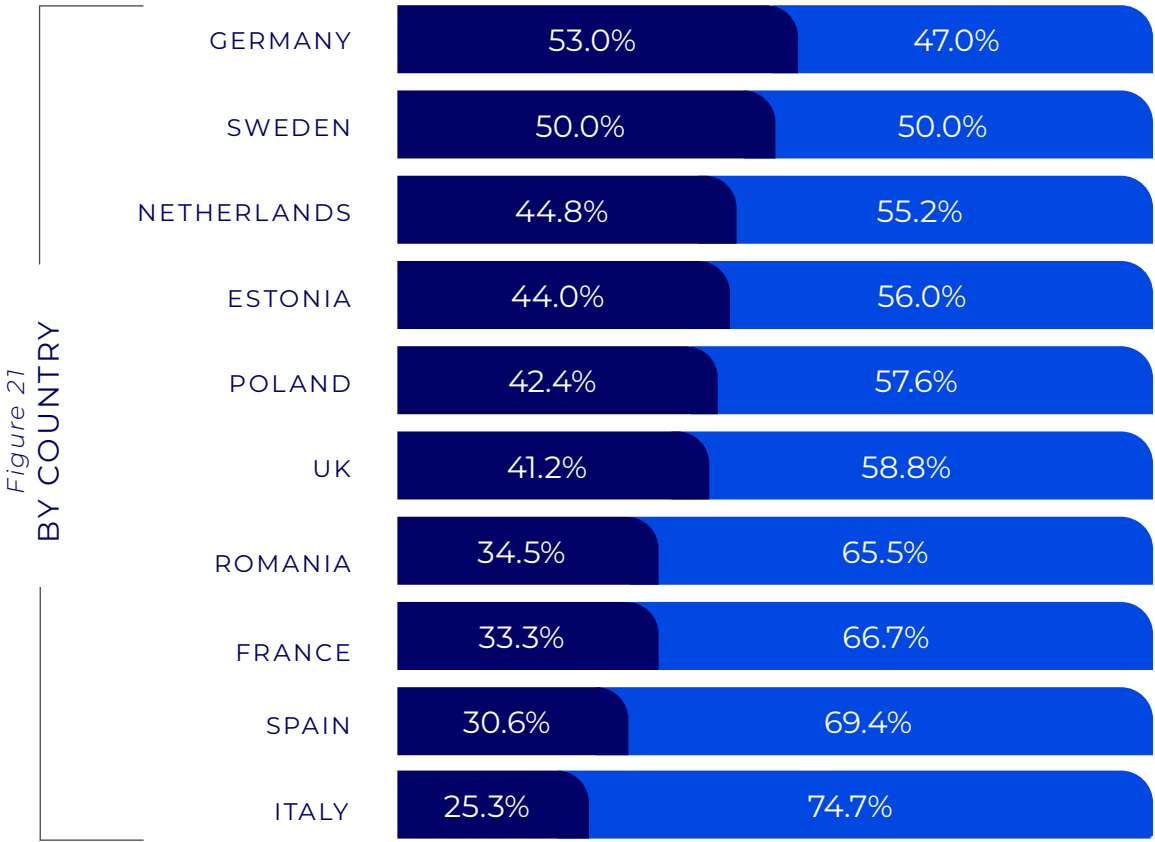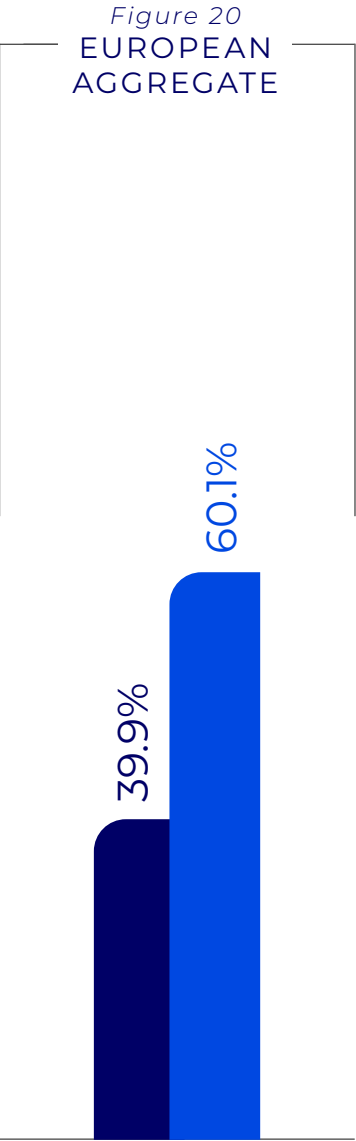| Age	Stand firm	Middle ground	Give in
18–24	31.2%	63.3%	5.5%
25–34	36.1%	58.1%	5.8%
35–44	30.4%	65.5%	4.1%
45–54	36.2%	60.8%	3.0%
55–64	41.6%	56.6%	2.8%
65+	46.1%	52.3%	1.6%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

QUESTION: Would you accept higher prices for technology products (smartphones, computers, electric vehicles, etc.) to reduce reliance on China?
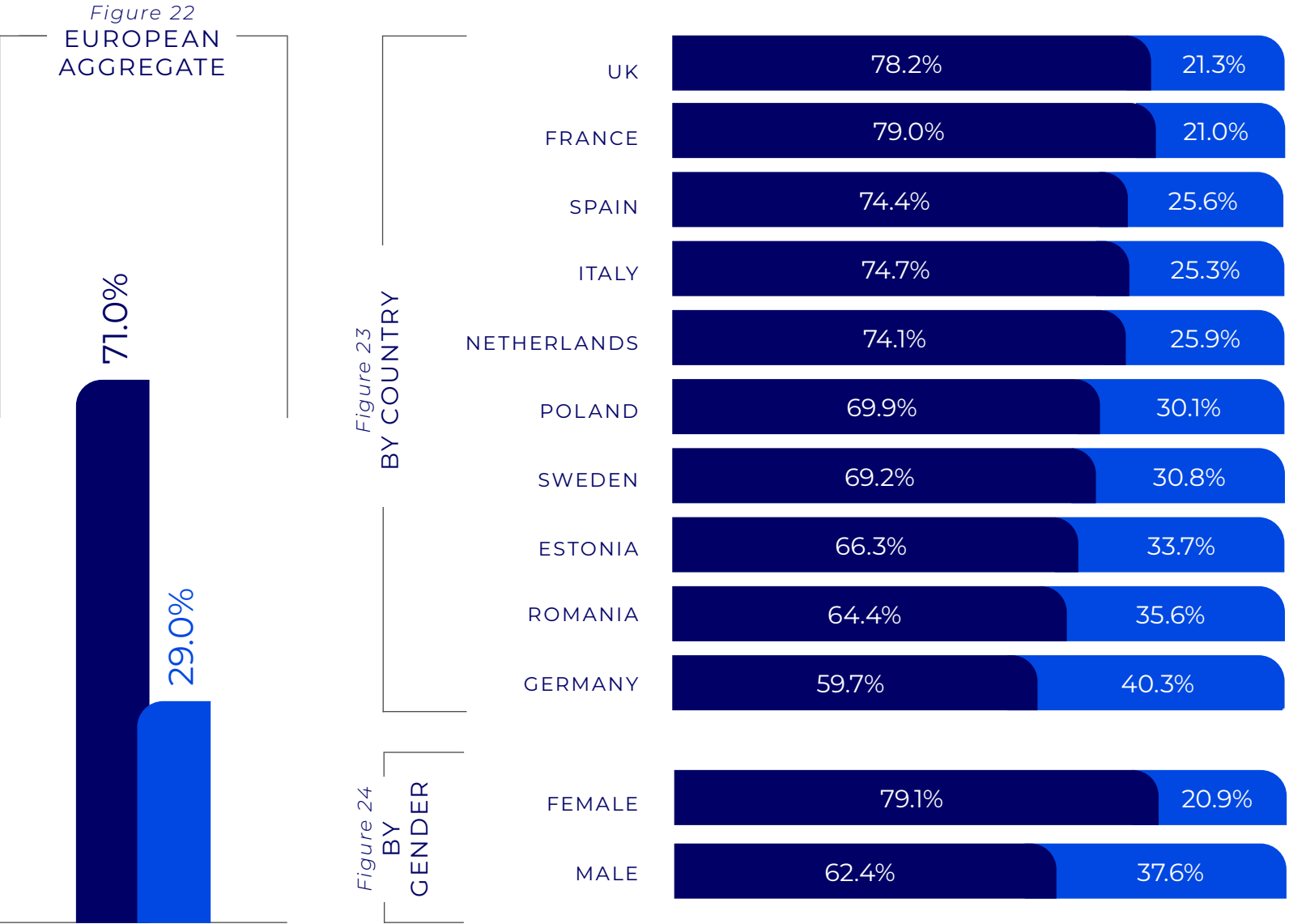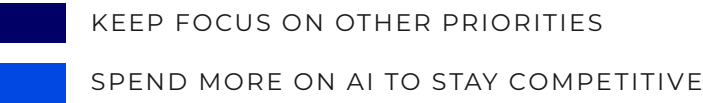
- **Four in ten Europeans would accept higher prices for technology products to reduce reliance on China** → *Figure 20.*

- Willingness to do so varies widely across countries: half of respondents in Germany (53%) and Sweden (50%) are prepared to pay more, while only 25.3% of Italians and 30.6% of Spaniards are willing to do so → *Figure 21.*

■ YES
■ NO

Figure 20
EUROPEAN AGGREGATE

39.9%
60.1%

Figure 21
BY COUNTRY

	YES	NO
GERMANY	53.0%	47.0%
SWEDEN	50.0%	50.0%
NETHERLANDS	44.8%	55.2%
ESTONIA	44.0%	56.0%
POLAND	42.4%	57.6%
UK	41.2%	58.8%
ROMANIA	34.5%	65.5%
FRANCE	33.3%	66.7%
SPAIN	30.6%	69.4%
ITALY	25.3%	74.7%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

QUESTION: Should Europe invest more in Artificial Intelligence (AI) and related technologies to stay competitive or keep public spending focused on other priorities such as education or healthcare?
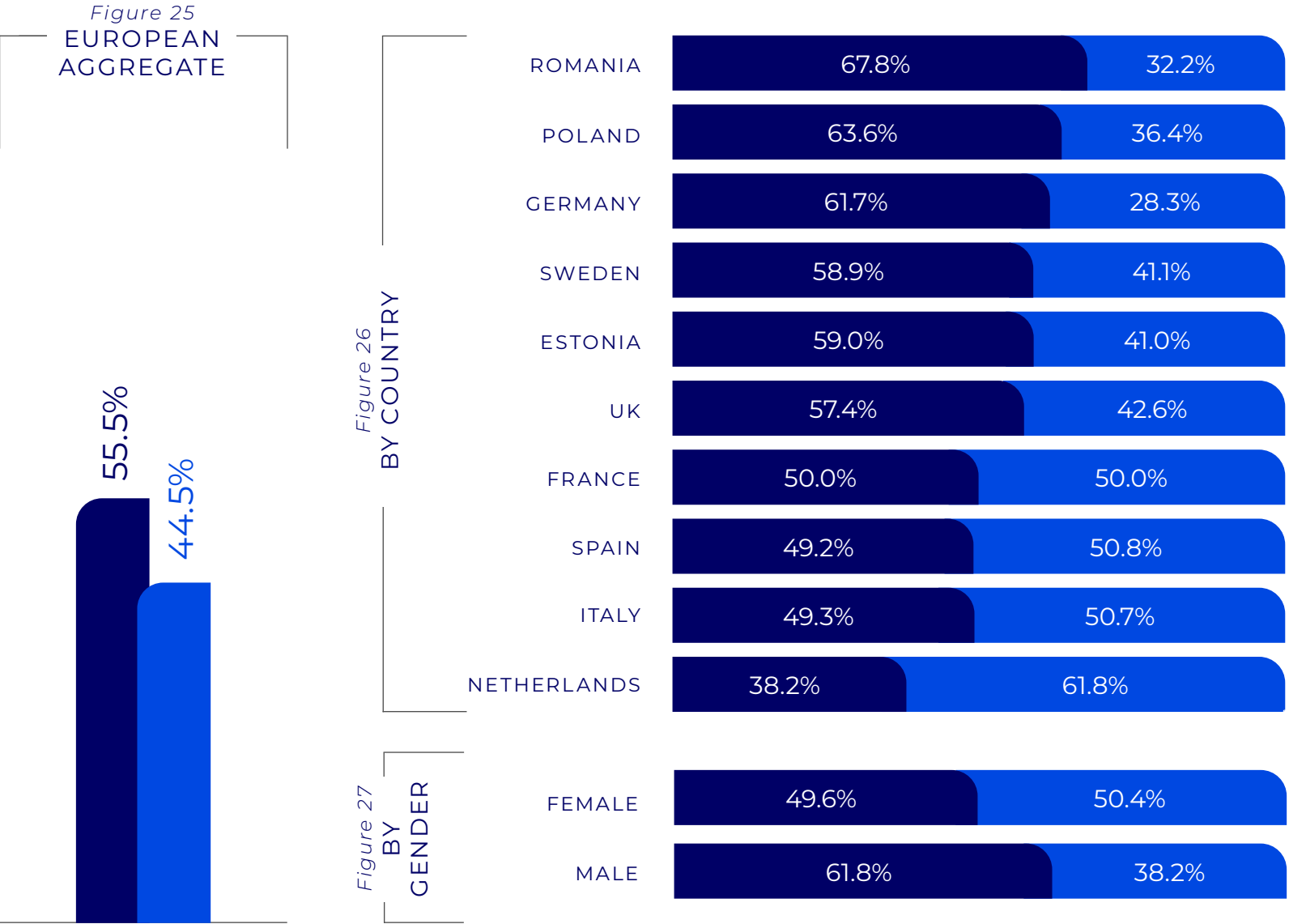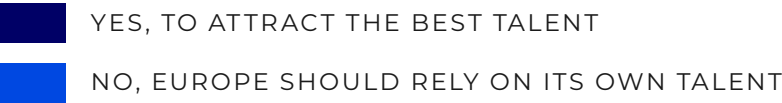
- A vast majority of Europeans (71%) would rather see public funds allocated to priorities such as education and healthcare than to AI investment → *Figure 22*.

- German citizens are the most favorable toward increasing AI investment (40.3%) as compared to only 21% of French citizens → *Figure 23*.

- Men are more supportive of increasing investment in AI (37.6%) than women (20.9%), although both groups remain far more in favor of directing spending toward education and healthcare → *Figure 24*.

■ KEEP FOCUS ON OTHER PRIORITIES

■ SPEND MORE ON AI TO STAY COMPETITIVE

Figure 22
EUROPEAN AGGREGATE

71.0%

29.0%

Figure 23
BY COUNTRY

	KEEP FOCUS ON OTHER PRIORITIES	SPEND MORE ON AI TO STAY COMPETITIVE
UK	78.2%	21.3%
FRANCE	79.0%	21.0%
SPAIN	74.4%	25.6%
ITALY	74.7%	25.3%
NETHERLANDS	74.1%	25.9%
POLAND	69.9%	30.1%
SWEDEN	69.2%	30.8%
ESTONIA	66.3%	33.7%
ROMANIA	64.4%	35.6%
GERMANY	59.7%	40.3%

Figure 24
BY GENDER

	KEEP FOCUS ON OTHER PRIORITIES	SPEND MORE ON AI TO STAY COMPETITIVE
FEMALE	79.1%	20.9%
MALE	62.4%	37.6%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

THE EU IN THE GLOBAL TECH RACE

- **A majority of Europeans (55.5%) support fast-tracking visas for highly qualified migrants to boost the region's competitiveness → *Figure 25*.**

- The Netherlands stands out as the most opposed country, with 61.8% believing that Europe should rely on its own talent. Mediterranean countries also show greater ambivalence toward the measure → *Figure 26*.

- Women are more evenly divided on the issue, showing less support for the measure than men → *Figure 27*.
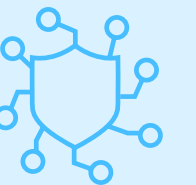
QUESTION: Should European governments fast-track visas for top scientists and tech experts from outside Europe to be more competitive?
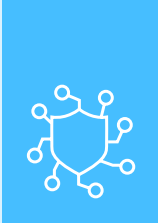
■ YES, TO ATTRACT THE BEST TALENT

■ NO, EUROPE SHOULD RELY ON ITS OWN TALENT

Figure 25
EUROPEAN AGGREGATE

55.5%
44.5%

Figure 26 BY COUNTRY

	YES	NO
ROMANIA	67.8%	32.2%
POLAND	63.6%	36.4%
GERMANY	61.7%	28.3%
SWEDEN	58.9%	41.1%
ESTONIA	59.0%	41.0%
UK	57.4%	42.6%
FRANCE	50.0%	50.0%
SPAIN	49.2%	50.8%
ITALY	49.3%	50.7%
NETHERLANDS	38.2%	61.8%

Figure 27 BY GENDER

	YES	NO
FEMALE	49.6%	50.4%
MALE	61.8%	38.2%

3

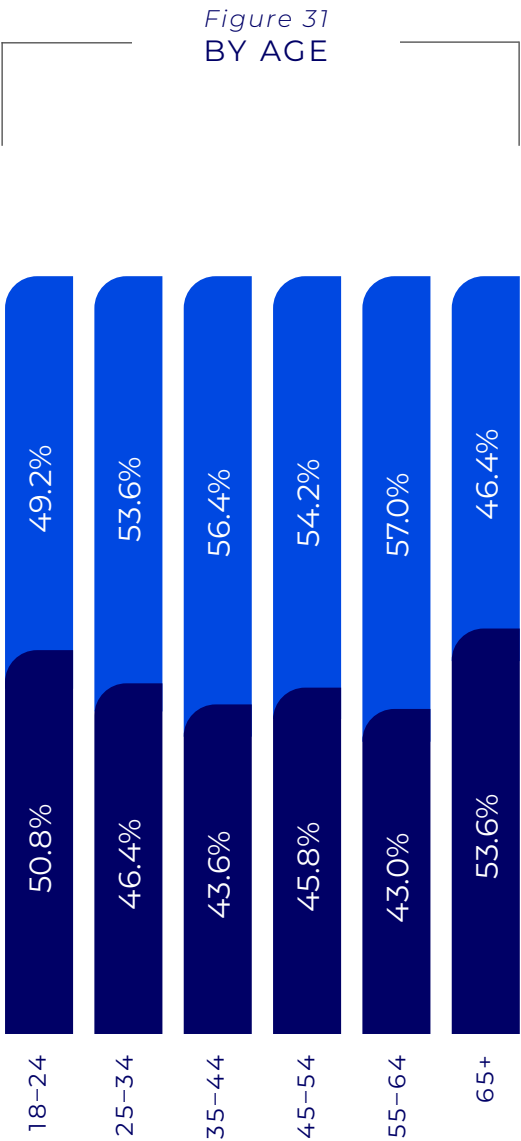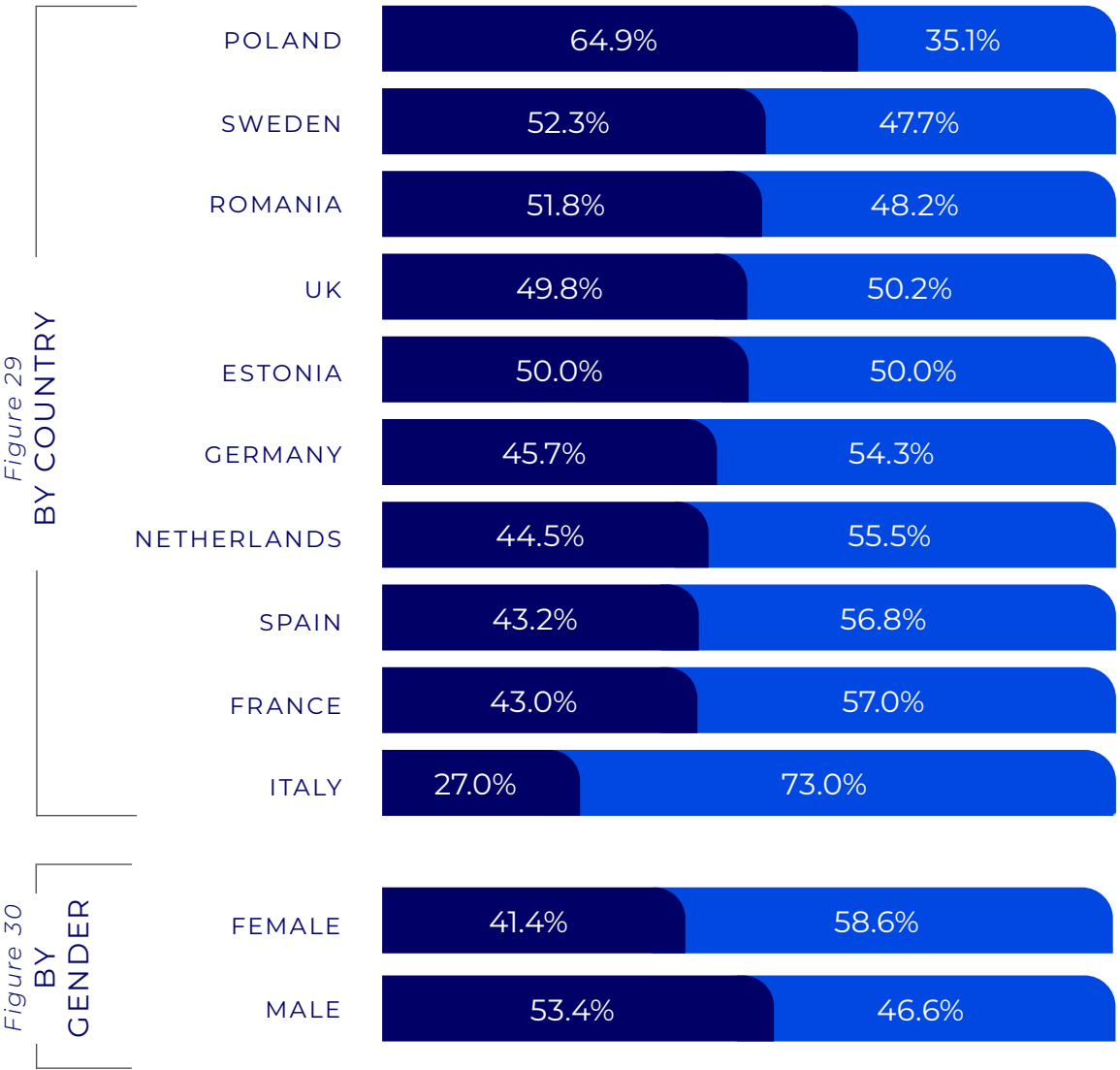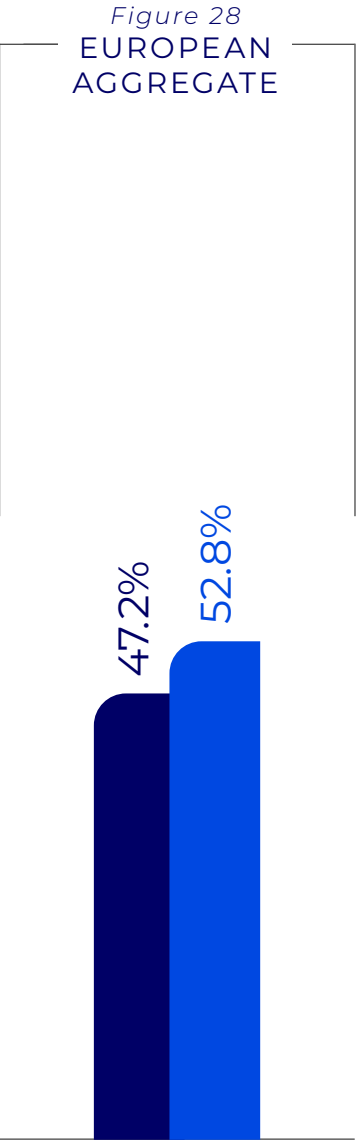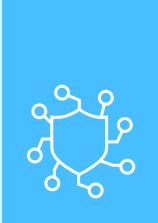**SECURITY AND STRATEGIC TECHNOLOGIES**

SECURITY AND STRATEGIC TECHNOLOGIES

- **A majority of Europeans (52.8%) oppose increasing defense spending, with Mediterranean countries leading the opposition → *Figure 28*.**

- Italy stands out, with 73% of citizens opposing higher defense spending, while Poland shows the strongest support, at 64.9% → *Figure 29*.

- Support is highest among the youngest and oldest respondents → *Figure 31*, whereas women are more likely than men to oppose such increase → *Figure 30*.

QUESTION: Recent surveys show broad support for increasing defense spending in Europe. Would you support defense spending if it meant reducing budgets for welfare and social spending?
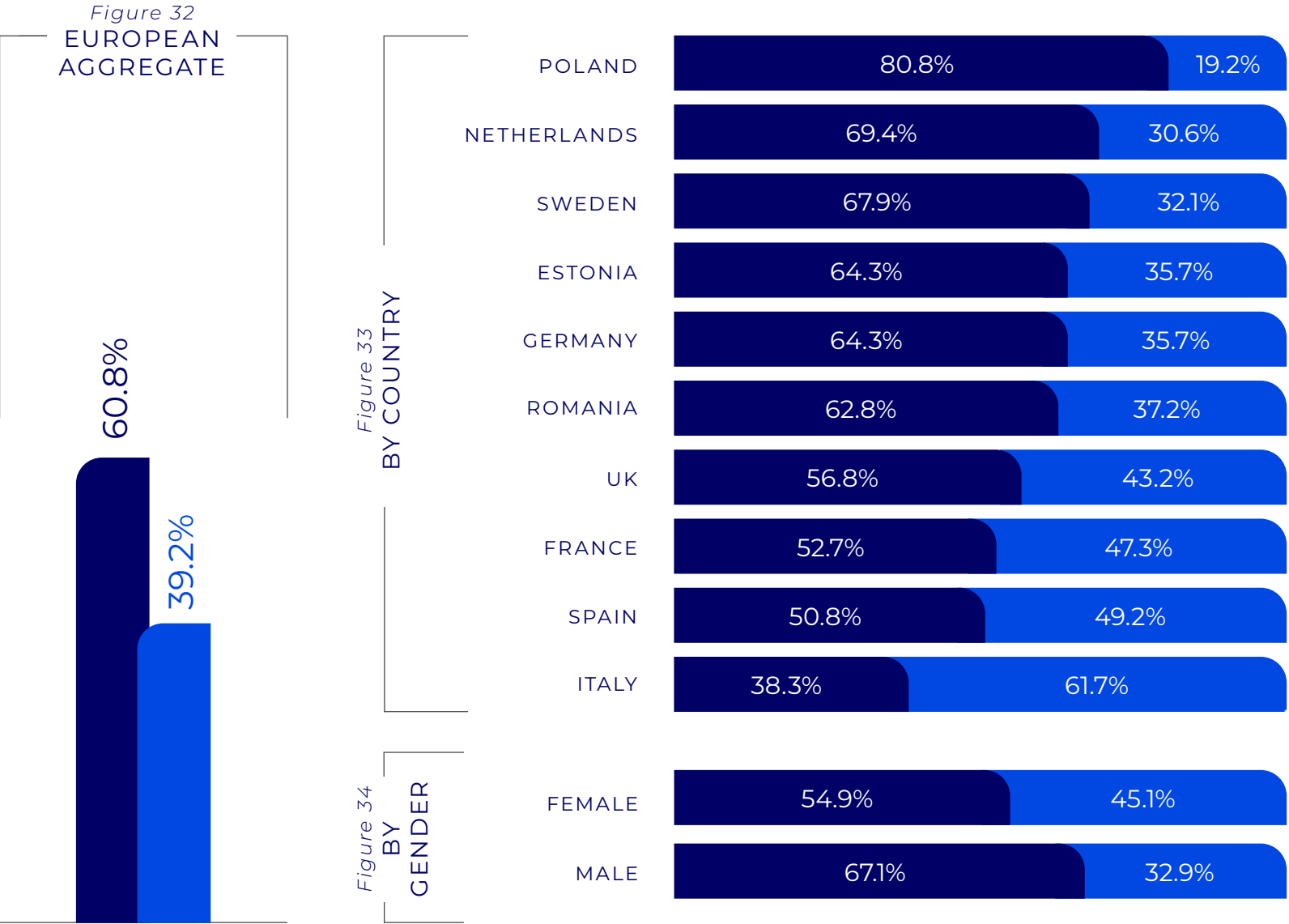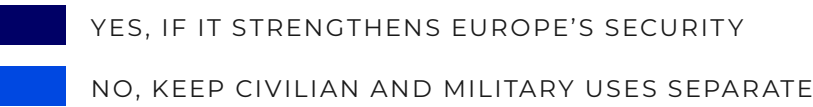
- YES
- NO

Figure 28
EUROPEAN AGGREGATE

47.2% 52.8%

Figure 29
BY COUNTRY

	YES	NO
POLAND	64.9%	35.1%
SWEDEN	52.3%	47.7%
ROMANIA	51.8%	48.2%
UK	49.8%	50.2%
ESTONIA	50.0%	50.0%
GERMANY	45.7%	54.3%
NETHERLANDS	44.5%	55.5%
SPAIN	43.2%	56.8%
FRANCE	43.0%	57.0%
ITALY	27.0%	73.0%

Figure 30
BY GENDER

	YES	NO
FEMALE	41.4%	58.6%
MALE	53.4%	46.6%

Figure 31
BY AGE

	YES	NO
18-24	50.8%	49.2%
25-34	46.4%	53.6%
35-44	43.6%	56.4%
45-54	45.8%	54.2%
55-64	43.0%	57.0%
65+	53.6%	46.4%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
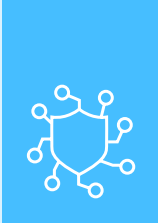
EUROPEAN TECH INSIGHTS **2025**

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SECURITY AND STRATEGIC TECHNOLOGIES

- **More than 60% of Europeans support using EU funds for civilian technologies that also have military uses → *Figure 32*, with particularly high backing in Poland (80.8%), the Netherlands (69.4%), and Sweden (67.9%) → *Figure 33*.**

- Mediterranean countries – notably France, Spain and Italy – show again more ambivalence, with 61.7% Italians rejecting the use of EU funds for dual-use technologies → *Figure 33*.

- Support is higher among men (67.1%) though most women (54.9%) also back investment in dual-use technologies → *Figure 34*.

QUESTION: Should EU funds for civilian technologies (like AI, quantum or satellites) also be used when these technologies can have military applications?

■ YES, IF IT STRENGTHENS EUROPE'S SECURITY

■ NO, KEEP CIVILIAN AND MILITARY USES SEPARATE

Figure 32
EUROPEAN AGGREGATE

60.8%

39.2%

Figure 33
BY COUNTRY

	YES, IF IT STRENGTHENS EUROPE'S SECURITY	NO, KEEP CIVILIAN AND MILITARY USES SEPARATE
POLAND	80.8%	19.2%
NETHERLANDS	69.4%	30.6%
SWEDEN	67.9%	32.1%
ESTONIA	64.3%	35.7%
GERMANY	64.3%	35.7%
ROMANIA	62.8%	37.2%
UK	56.8%	43.2%
FRANCE	52.7%	47.3%
SPAIN	50.8%	49.2%
ITALY	38.3%	61.7%

Figure 34
BY GENDER

	YES	NO
FEMALE	54.9%	45.1%
MALE	67.1%	32.9%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

QUESTION: When it comes to Europe's security technologies (like cybersecurity, surveillance systems or defense equipment), which approach do you prefer?

- PRIORITIZE EUROPEAN COMPANIES, EVEN IF THE TECHNOLOGY COSTS MORE
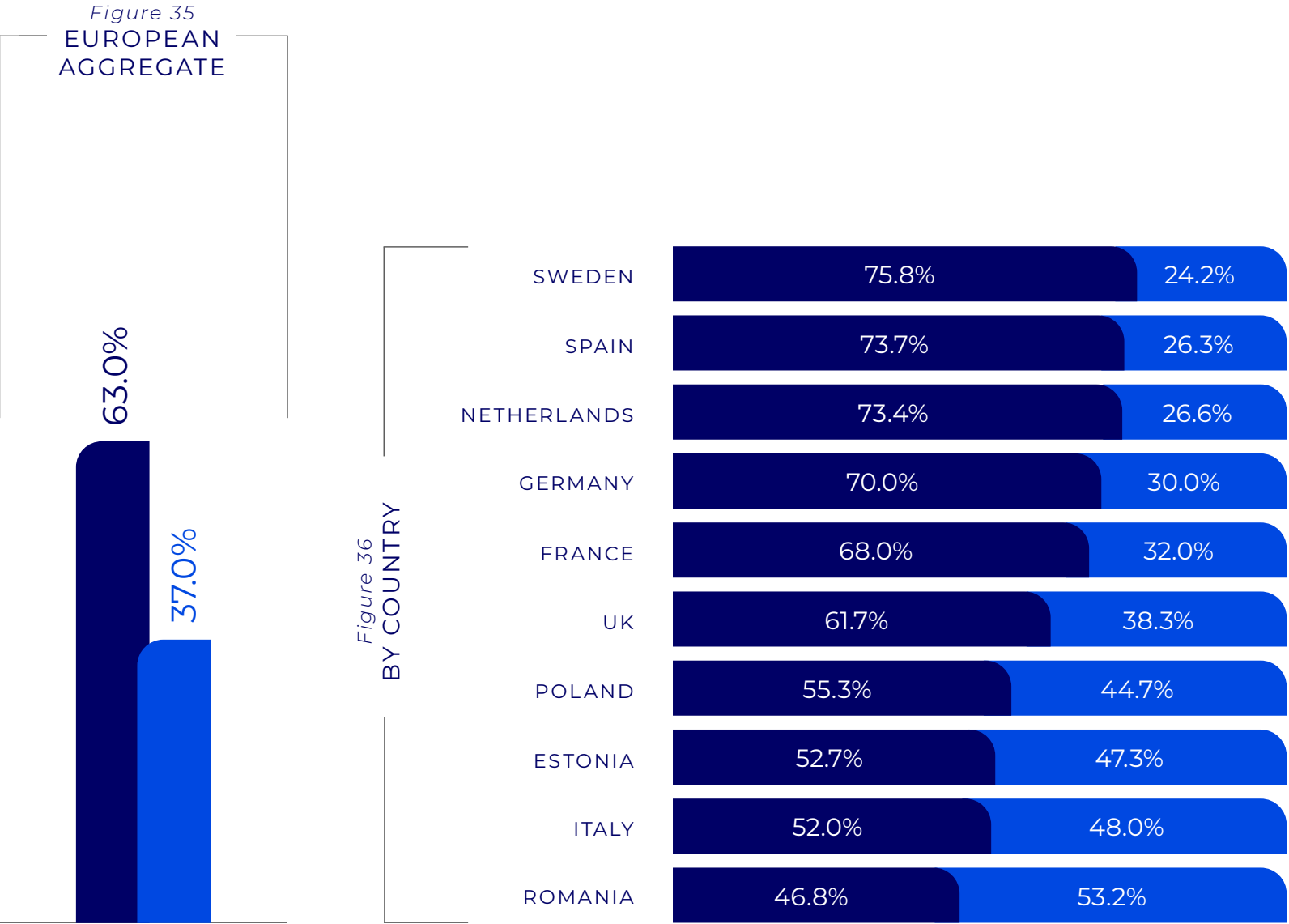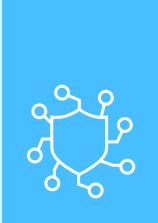- BUY FROM THE PROVIDER WITH BEST PRICE / QUALITY RATIO, REGARDLESS OF ORIGIN

- **A clear majority of Europeans (63%) prefer European-made security technologies, even if they come at a higher cost → *Figure 35*.**

- This "buy European" sentiment is strongest in Sweden (75.8%), Spain (73.7%), and the Netherlands (73.4%), while Romania stands out as the only country without a majority sharing this view → *Figure 36*.

Figure 35
EUROPEAN
AGGREGATE

63.0%

37.0%

Figure 36
BY COUNTRY

Country	Prioritize European	Best price/quality
SWEDEN	75.8%	24.2%
SPAIN	73.7%	26.3%
NETHERLANDS	73.4%	26.6%
GERMANY	70.0%	30.0%
FRANCE	68.0%	32.0%
UK	61.7%	38.3%
POLAND	55.3%	44.7%
ESTONIA	52.7%	47.3%
ITALY	52.0%	48.0%
ROMANIA	46.8%	53.2%

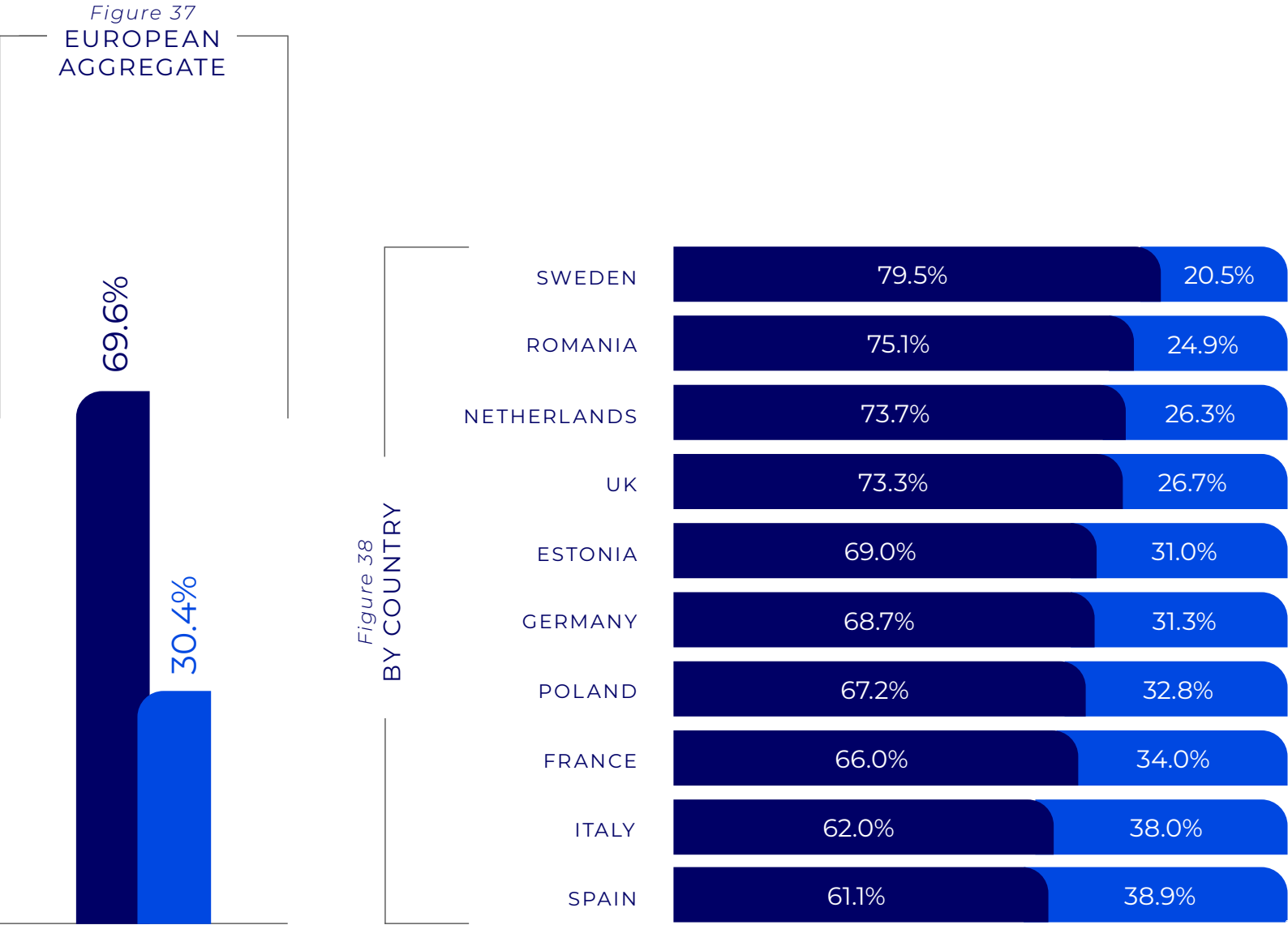Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
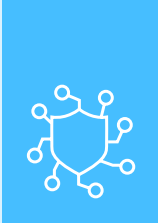
SECURITY AND STRATEGIC TECHNOLOGIES

- **A strong majority of Europeans (69.6%) support introducing EU-wide rules to limit the export of sensitive technologies to rival countries → *Figure 37*.**

- Support for such restrictions is particularly high in Sweden (79.5%). By contrast, Southern European countries show more hesitation, with support falling to around 61–62% in Spain and Italy → *Figure 38*.

QUESTION: Some people propose Europe-wide rules to limit the export of sensitive technologies (like chips, AI or advanced software) to rival countries. Do you support or oppose this?

- SUPPORT
- OPPOSE

Figure 37
EUROPEAN AGGREGATE

69.6%

30.4%

Figure 38
BY COUNTRY

Country	Support	Oppose
SWEDEN	79.5%	20.5%
ROMANIA	75.1%	24.9%
NETHERLANDS	73.7%	26.3%
UK	73.3%	26.7%
ESTONIA	69.0%	31.0%
GERMANY	68.7%	31.3%
POLAND	67.2%	32.8%
FRANCE	66.0%	34.0%
ITALY	62.0%	38.0%
SPAIN	61.1%	38.9%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

SECURITY AND STRATEGIC TECHNOLOGIES

QUESTION: Where should sensitive public data be stored in the cloud: only on servers located in Europe or with any trusted provider even if it's based abroad?

- ONLY EUROPEAN PROVIDERS — SENSITIVE DATA SHOULD STAY WITHIN EUROPE
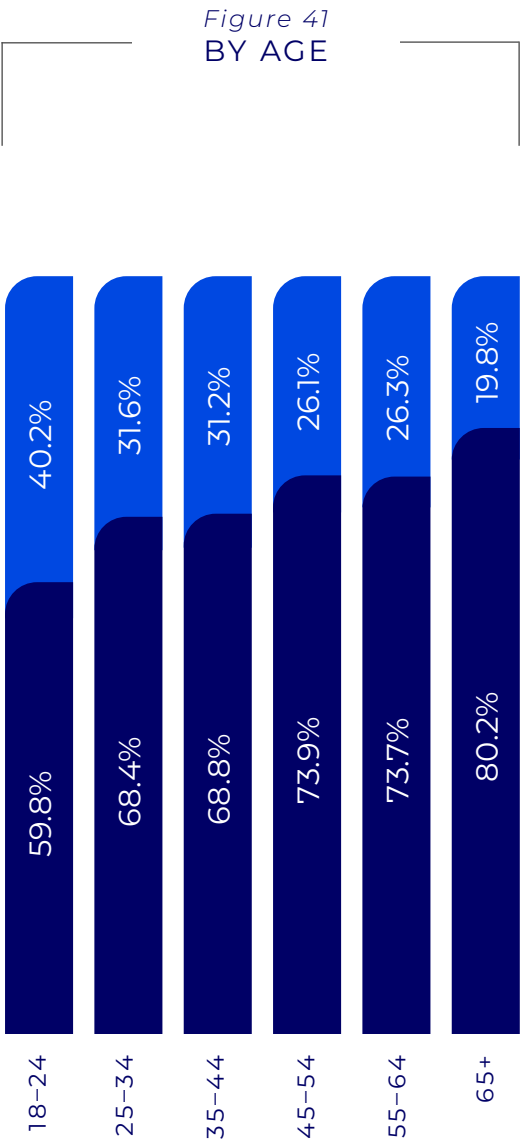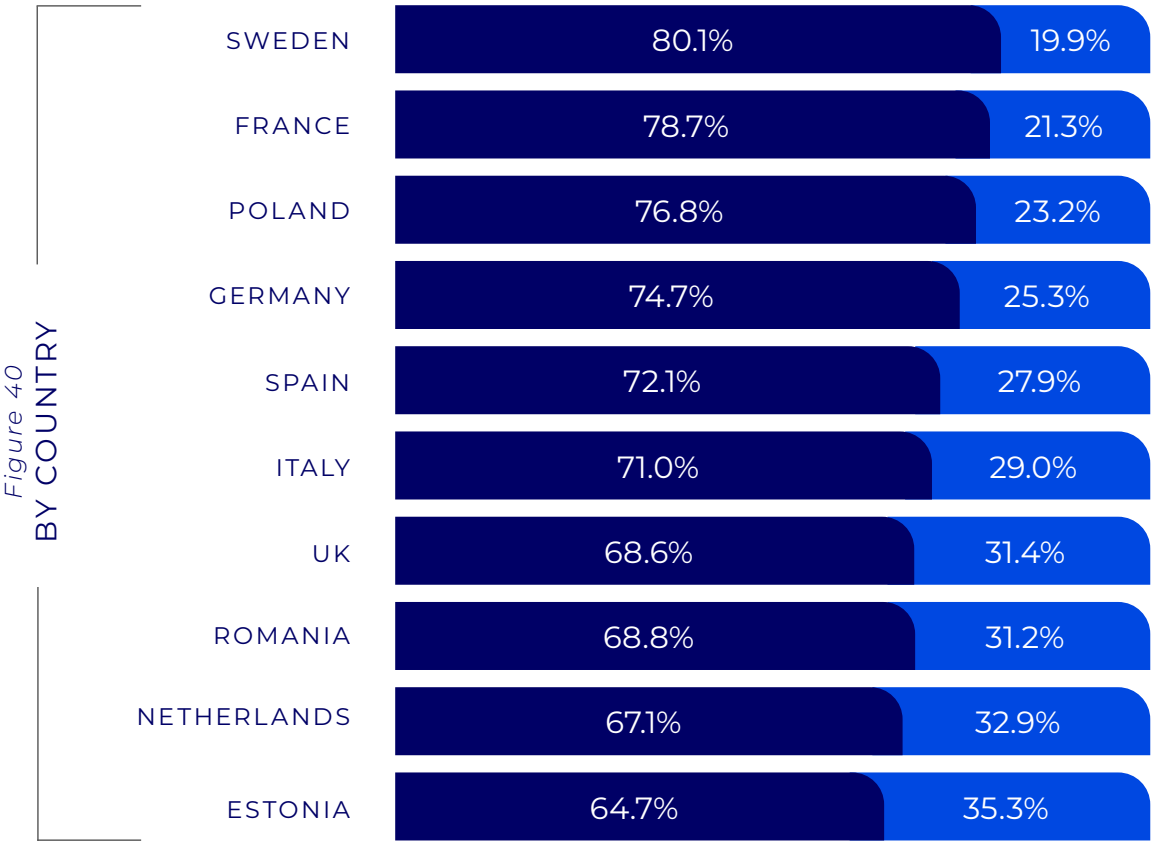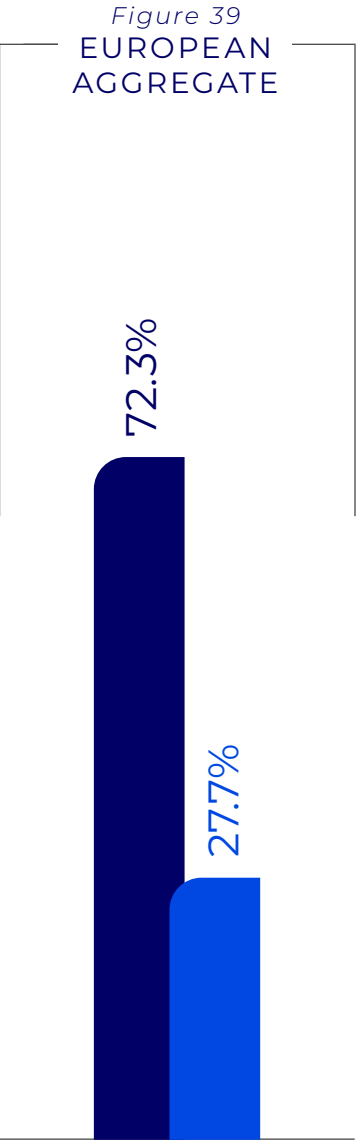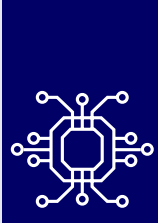- TRUSTED PROVIDERS FROM OUTSIDE EUROPE ARE ALSO ACCEPTABLE

- **Almost three in four Europeans (72.3%) believe that sensitive public data should be stored only on servers located within Europe → *Figure 39*.**

- By country, Sweden (80.1%), France (78.7%), and Poland (76.8%) show the highest support for European-only cloud storage, while Estonia (64.7%) expresses the most openness to trusted non-European providers → *Figure 40*.

- Support for keeping data in Europe increases with age, rising from 59.8% among 18–24-year-olds to 80.2% among those aged 65 and over → *Figure 41*.

Figure 39
EUROPEAN AGGREGATE

72.3%

27.7%

Figure 40
BY COUNTRY

Country	Only European	Trusted outside
SWEDEN	80.1%	19.9%
FRANCE	78.7%	21.3%
POLAND	76.8%	23.2%
GERMANY	74.7%	25.3%
SPAIN	72.1%	27.9%
ITALY	71.0%	29.0%
UK	68.6%	31.4%
ROMANIA	68.8%	31.2%
NETHERLANDS	67.1%	32.9%
ESTONIA	64.7%	35.3%

Figure 41
BY AGE

Age	Trusted outside	Only European
18–24	40.2%	59.8%
25–34	31.6%	68.4%
35–44	31.2%	68.8%
45–54	26.1%	73.9%
55–64	26.3%	73.7%
65+	19.8%	80.2%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
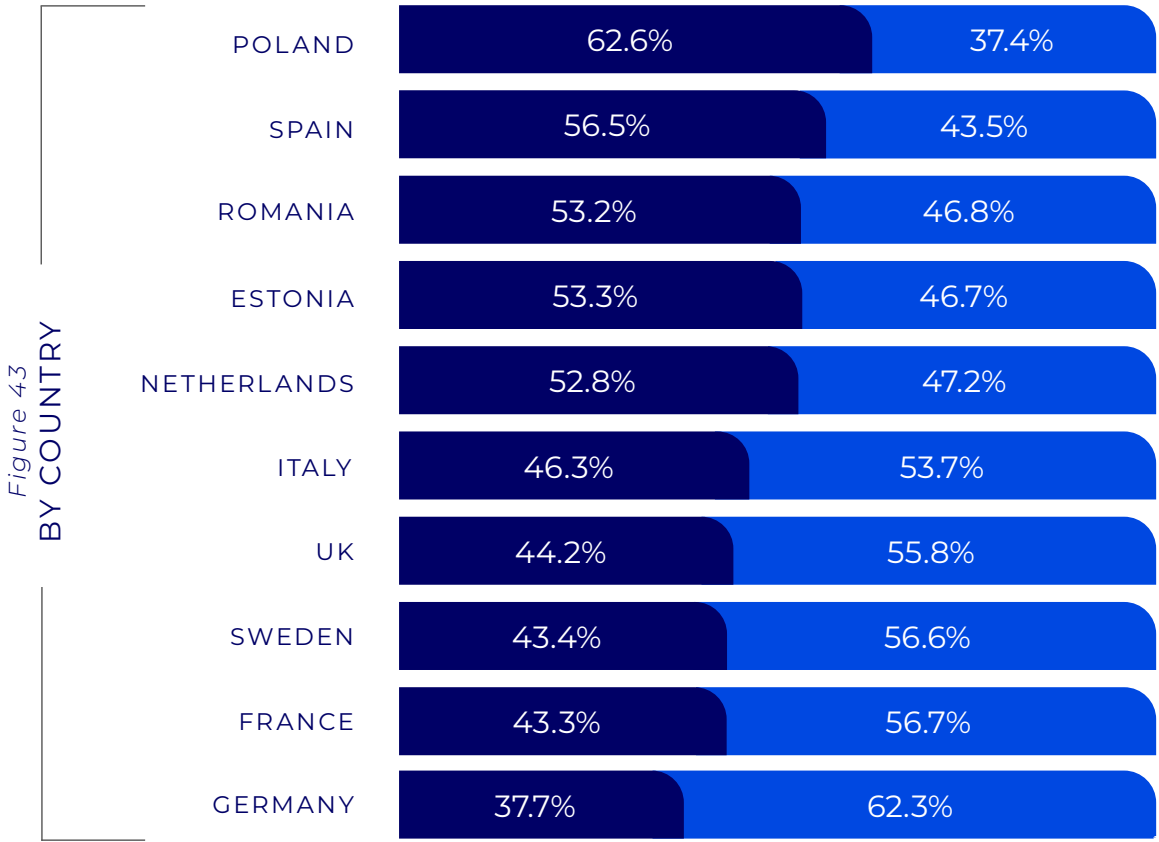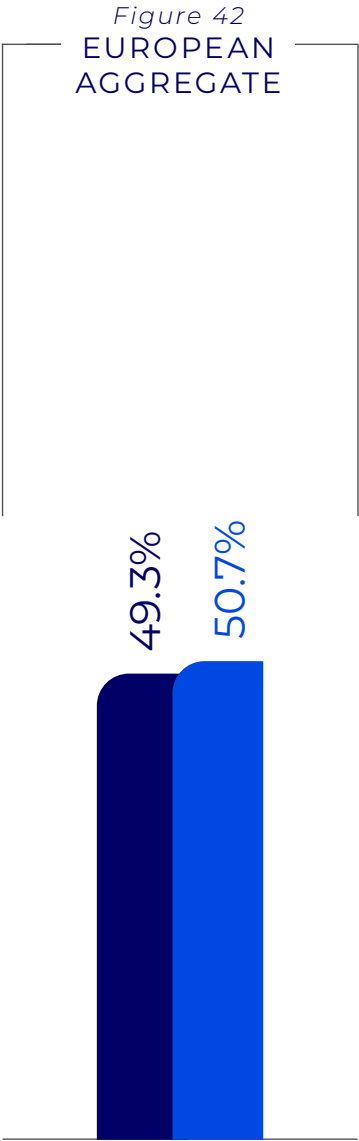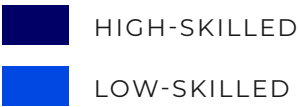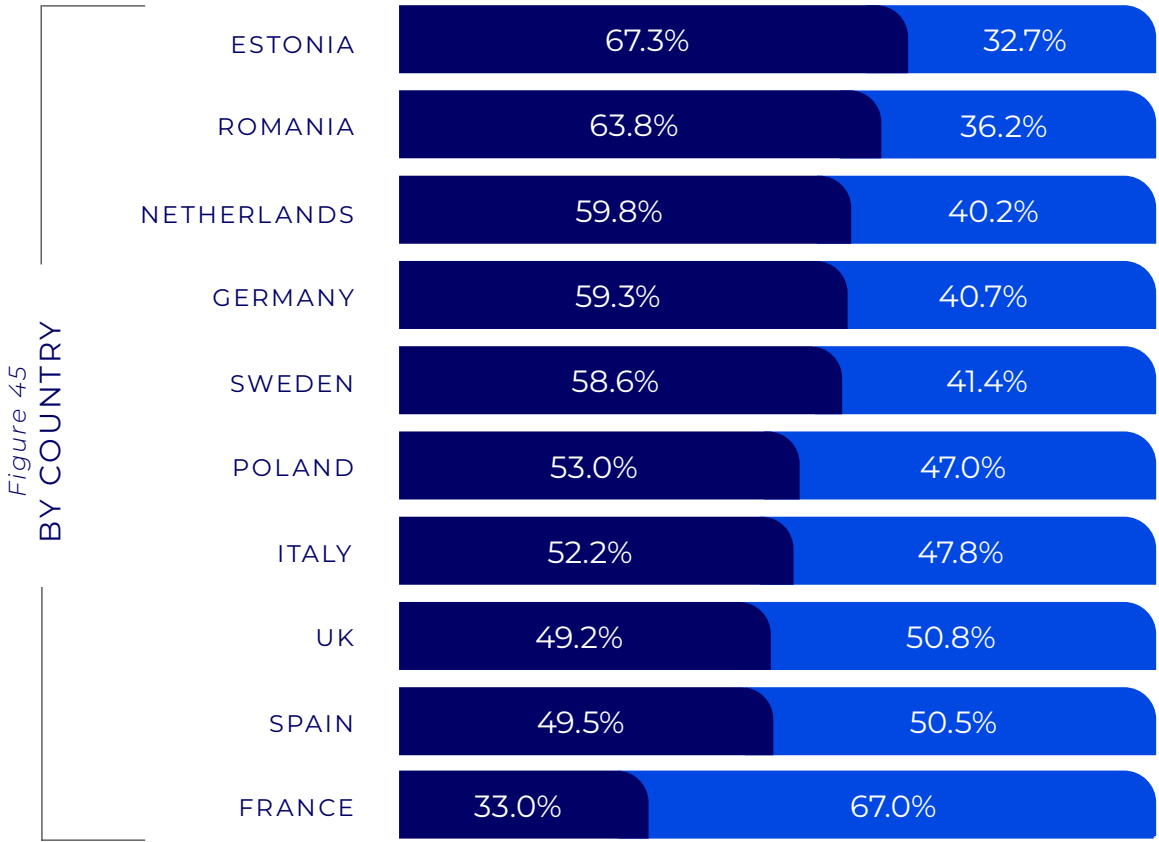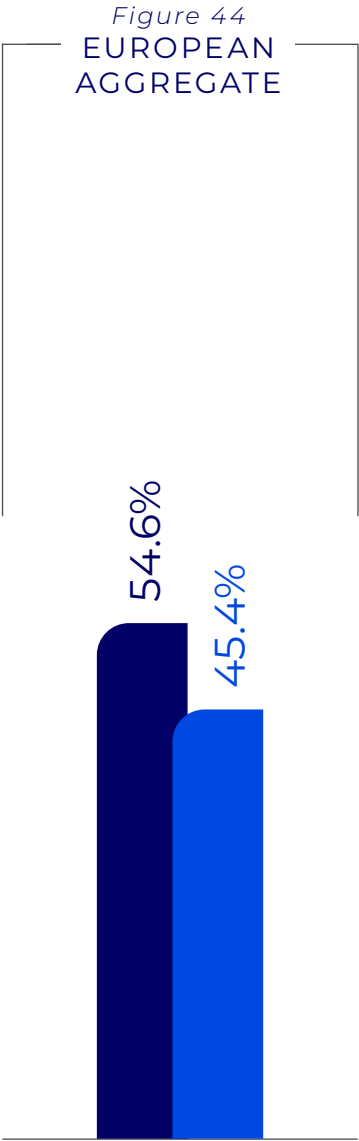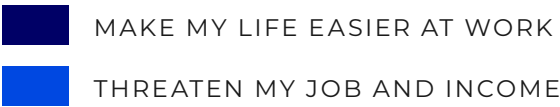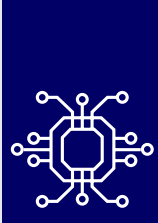
4

AI IN THE LIVES
OF EUROPEANS
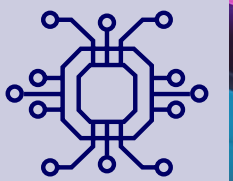
AI IN THE LIVES OF EUROPEANS

- **Europeans are evenly divided on whether AI is more likely to replace low-skilled (50.7%) or high-skilled (49.3%) jobs → *Figure 42*.**

- Perceptions vary significantly across countries: Poland (62.6%) and Spain (56.5%) are the most likely to believe high-skilled jobs are at greater risk, while Germany (62.3%) and France (56.7%) lean toward low-skilled jobs being more vulnerable → *Figure 43*.

■ HIGH-SKILLED
■ LOW-SKILLED

Figure 42
EUROPEAN AGGREGATE

49.3%   50.7%

Figure 43
BY COUNTRY

	HIGH-SKILLED	LOW-SKILLED
POLAND	62.6%	37.4%
SPAIN	56.5%	43.5%
ROMANIA	53.2%	46.8%
ESTONIA	53.3%	46.7%
NETHERLANDS	52.8%	47.2%
ITALY	46.3%	53.7%
UK	44.2%	55.8%
SWEDEN	43.4%	56.6%
FRANCE	43.3%	56.7%
GERMANY	37.7%	62.3%

AI IN THE LIVES OF EUROPEANS

QUESTION: Do you feel AI is more likely to make your life easier at work or to threaten your job and income?

■ MAKE MY LIFE EASIER AT WORK

■ THREATEN MY JOB AND INCOME
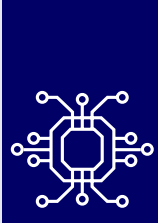
- **A majority of Europeans (54.6%) believe that AI is more likely to make their work life easier, while 45.4% fear it could threaten their jobs and income → *Figure 44*.**

- Optimism about AI's benefits is highest in Estonia (67.3%) and Romania (63.8%), where most respondents see it as a tool to improve working life → *Figure 45*.

- By contrast, French citizens show the greatest concern (67%) about AI's potential to disrupt employment → *Figure 45*.

Figure 44
EUROPEAN AGGREGATE

54.6% 45.4%

Figure 45
BY COUNTRY

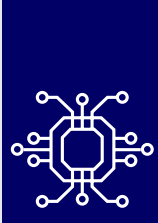|	MAKE MY LIFE EASIER AT WORK	THREATEN MY JOB AND INCOME
ESTONIA	67.3%	32.7%
ROMANIA	63.8%	36.2%
NETHERLANDS	59.8%	40.2%
GERMANY	59.3%	40.7%
SWEDEN	58.6%	41.4%
POLAND	53.0%	47.0%
ITALY	52.2%	47.8%
UK	49.2%	50.8%
SPAIN	49.5%	50.5%
FRANCE	33.0%	67.0%

AI IN THE LIVES OF EUROPEANS

- **An overwhelming majority of European citizens (90.3%) prefer an imperfect human boss to a flawless AI → *Figure 46*.**

- This preference for human interaction is consistent across countries, genders, education levels, and age groups → *Figure 47*.

- A HUMAN BOSS
- AN AI BOSS

Figure 46
EUROPEAN AGGREGATE

90.3

9.7%

Figure 47
BY COUNTRY

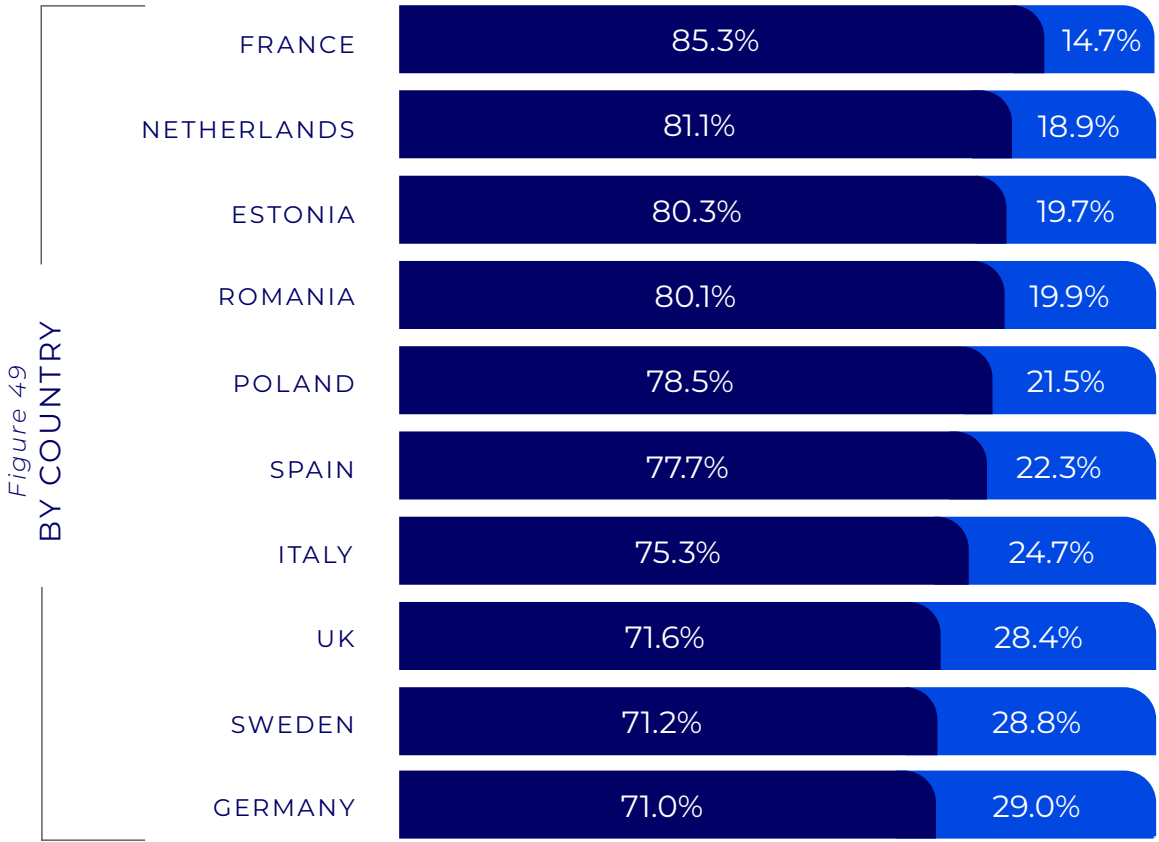|	A HUMAN BOSS	AN AI BOSS
NETHERLANDS	95.0%	5.0%
SWEDEN	93.7%	6.3%
POLAND	92.7%	7.3%
UK	92.1%	7.9%
SPAIN	90.7%	9.3%
GERMANY	90.3%	9.7%
FRANCE	89.3%	10.7%
ROMANIA	88.4%	11.6%
ESTONIA	86.7%	13.3%
ITALY	84.0%	16.0%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

QUESTION: Would you prefer your child to learn with the help of AI or only from human teachers?
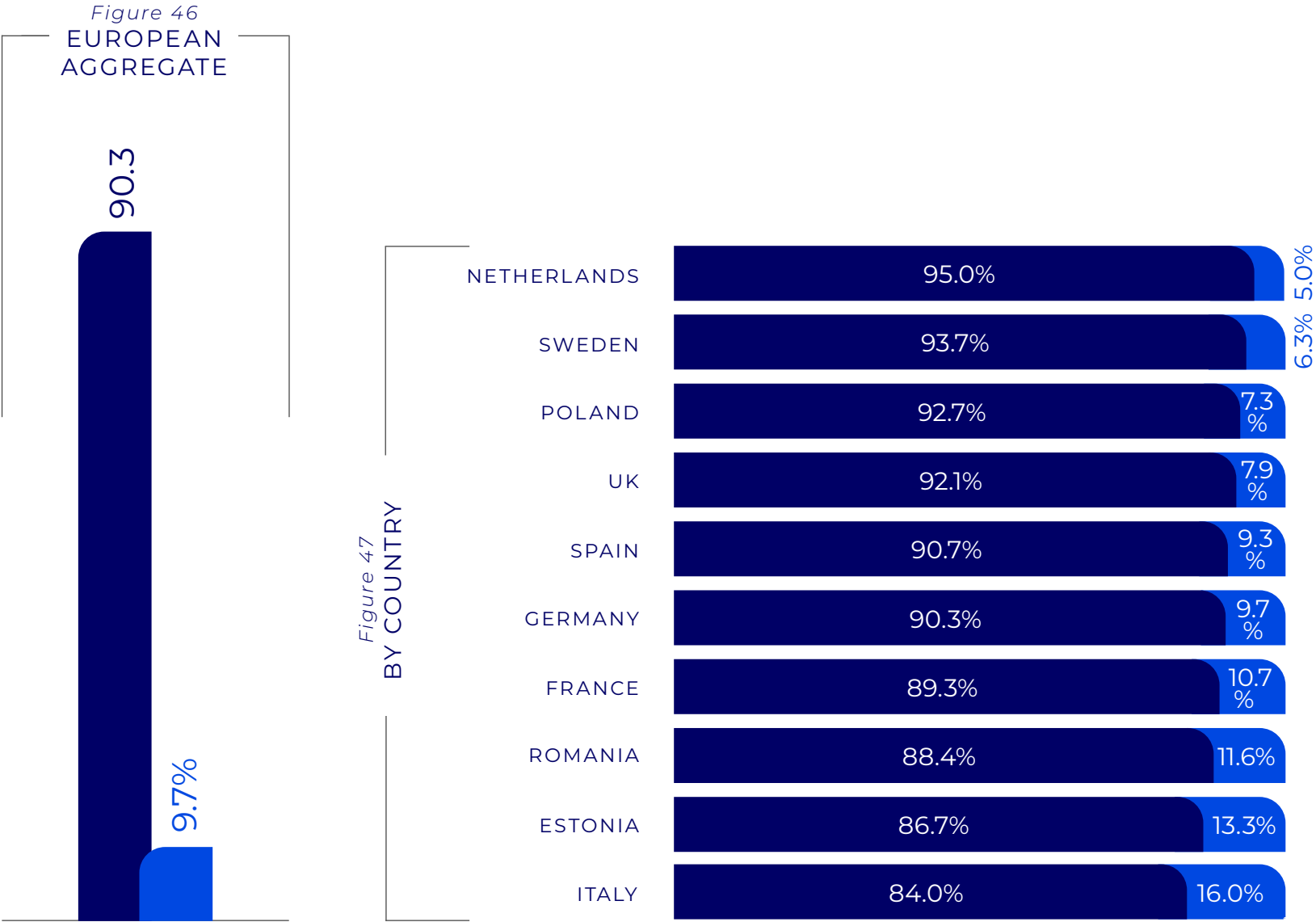
- **A strong majority of Europeans (77.2%) oppose the use of AI in their children's education, even when it is intended only to support human teachersI → *Figure 48*.**

- This preference is strongest in France (85.3%) and the Netherlands (81.1%), while almost a third of Germans, Swedes and Britons show openness to AI-assisted learning → *Figure 49*.

■ ONLY FROM HUMAN TEACHERS

■ WITH THE HELP OF AI

Figure 48
EUROPEAN AGGREGATE

77.2%

22.8%

Figure 49
BY COUNTRY

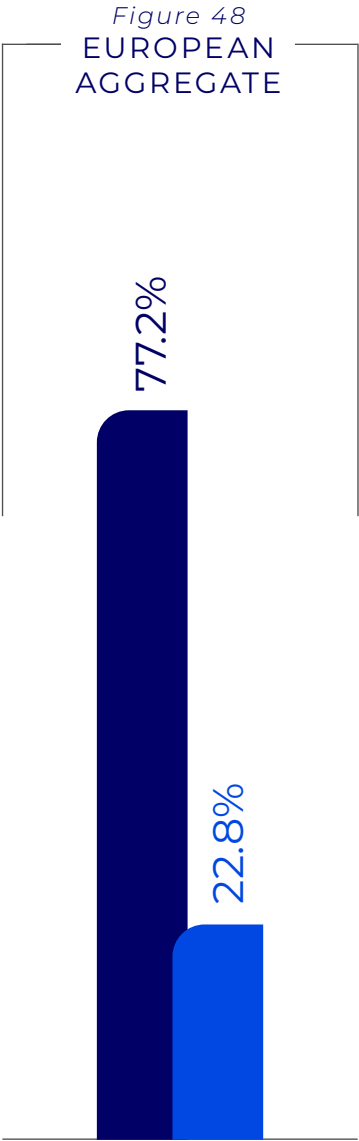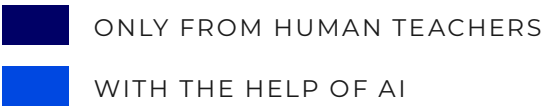|	ONLY FROM HUMAN TEACHERS	WITH THE HELP OF AI
FRANCE	85.3%	14.7%
NETHERLANDS	81.1%	18.9%
ESTONIA	80.3%	19.7%
ROMANIA	80.1%	19.9%
POLAND	78.5%	21.5%
SPAIN	77.7%	22.3%
ITALY	75.3%	24.7%
UK	71.6%	28.4%
SWEDEN	71.2%	28.8%
GERMANY	71.0%	29.0%

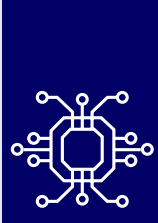Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
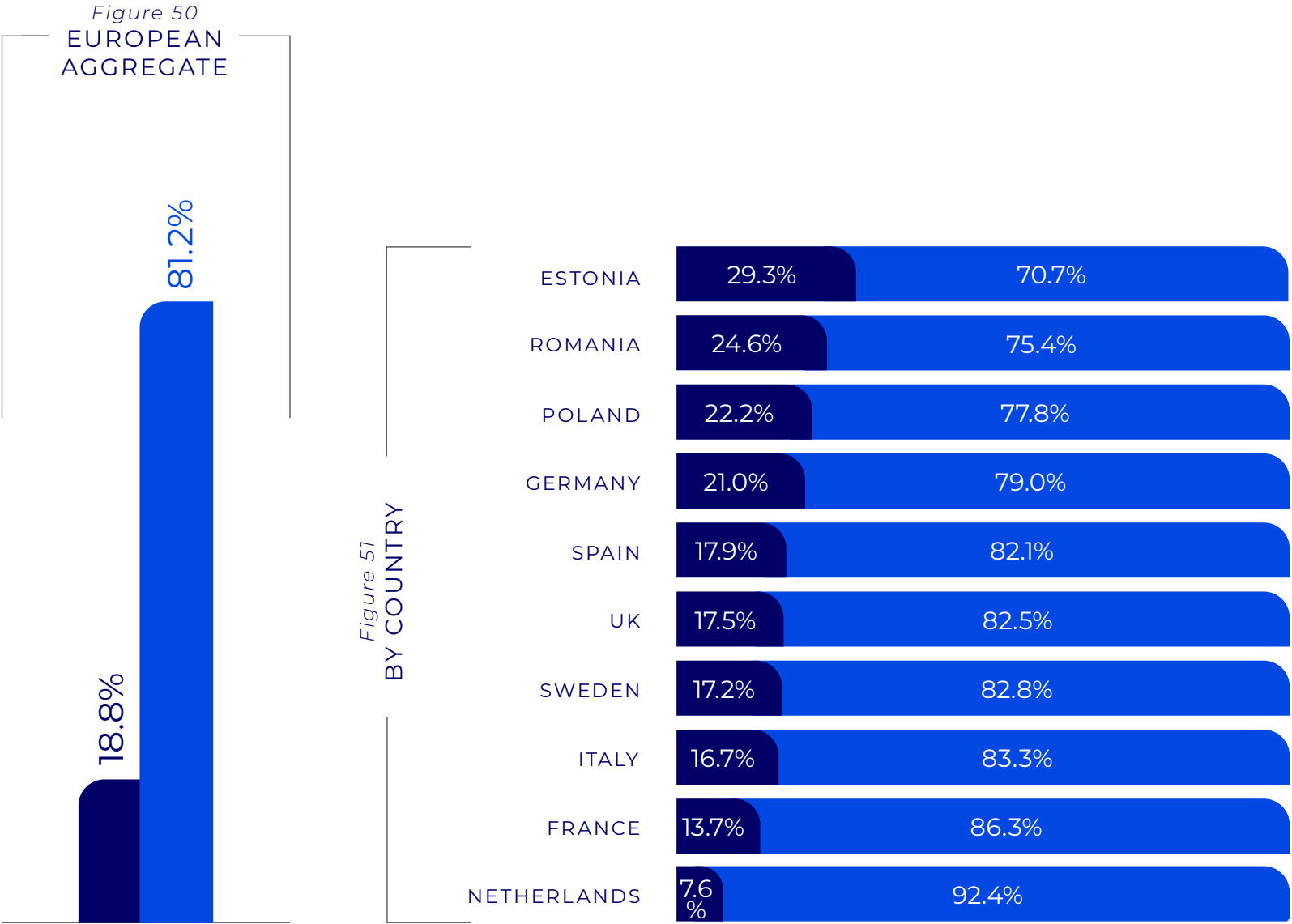
- **An overwhelming majority of Europeans (81,2%) would not trust AI to manage their personal finances → *Figure 50*.**

- However, openness to AI-driven financial management varies across countries. While only 7.6% in the Netherlands and 13.7% in France would delegate such tasks to AI, nearly one in three Estonians say they would → *Figure 51*.

**QUESTION:** Would you let an AI manage your personal finances (e.g. investments, savings)?

■ YES
■ NO

Figure 50
EUROPEAN AGGREGATE

18.8%
81.2%

Figure 51
BY COUNTRY

Country	YES	NO
ESTONIA	29.3%	70.7%
ROMANIA	24.6%	75.4%
POLAND	22.2%	77.8%
GERMANY	21.0%	79.0%
SPAIN	17.9%	82.1%
UK	17.5%	82.5%
SWEDEN	17.2%	82.8%
ITALY	16.7%	83.3%
FRANCE	13.7%	86.3%
NETHERLANDS	7.6%	92.4%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
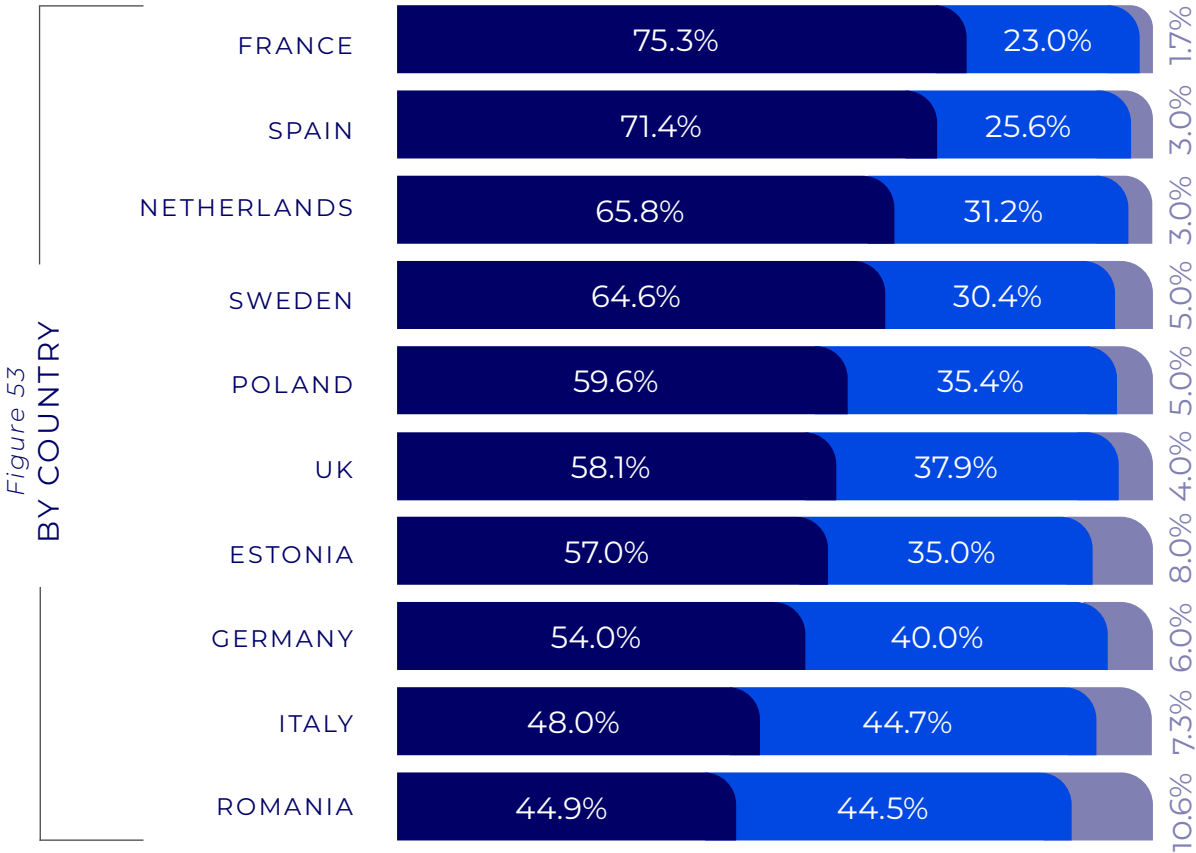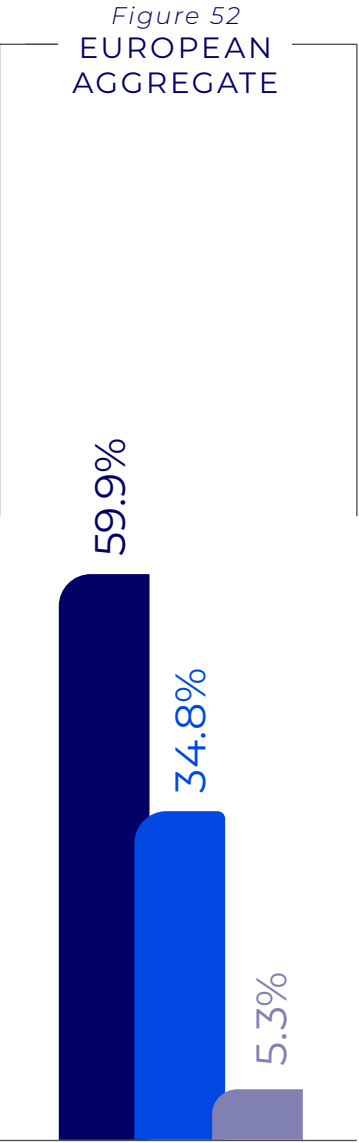
#20
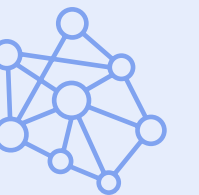
TRUST IN THE AGE OF ALGORITHMS

- **Most Europeans (59.9%) trust AI-made videos less than human-made ones → *Figure 52*.**

- Skepticism is strongest in France (75.3%) and Spain (71.4%), while trust levels are somewhat higher in Romania and Italy (around 45%), where more people say they would trust AI-produced and human-produced videos equally → *Figure 53*.

QUESTION: If you knew an informational video was made with AI, would you trust its information more, less or the same than one made only by humans?

Legend:
- LESS
- THE SAME
- MORE

Figure 52
EUROPEAN AGGREGATE

- 59.9%
- 34.8%
- 5.3%

Figure 53
BY COUNTRY

Country	Less	The Same	More
FRANCE	75.3%	23.0%	1.7%
SPAIN	71.4%	25.6%	3.0%
NETHERLANDS	65.8%	31.2%	3.0%
SWEDEN	64.6%	30.4%	5.0%
POLAND	59.6%	35.4%	5.0%
UK	58.1%	37.9%	4.0%
ESTONIA	57.0%	35.0%	8.0%
GERMANY	54.0%	40.0%	6.0%
ITALY	48.0%	44.7%	7.3%
ROMANIA	44.9%	44.5%	10.6%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
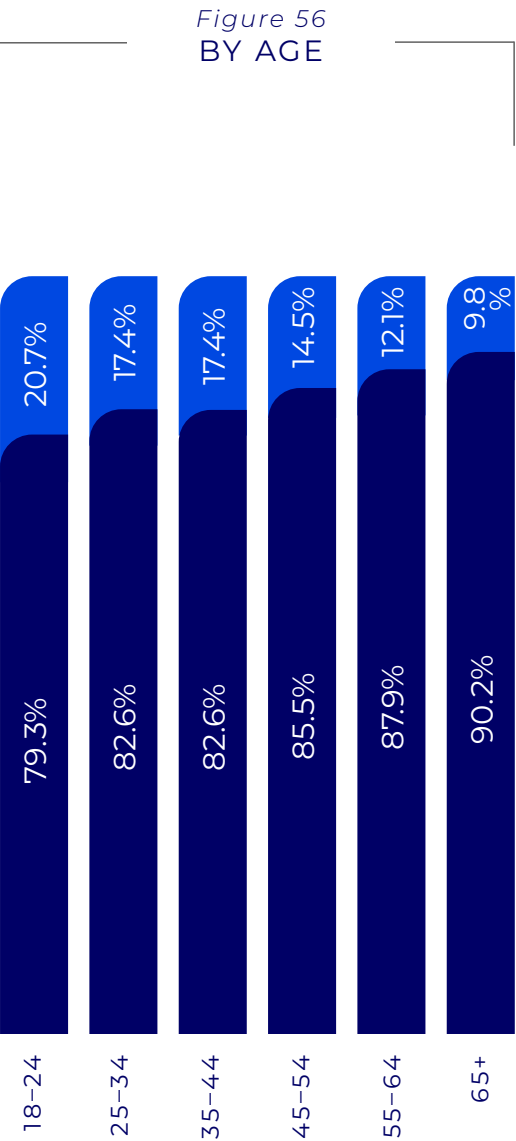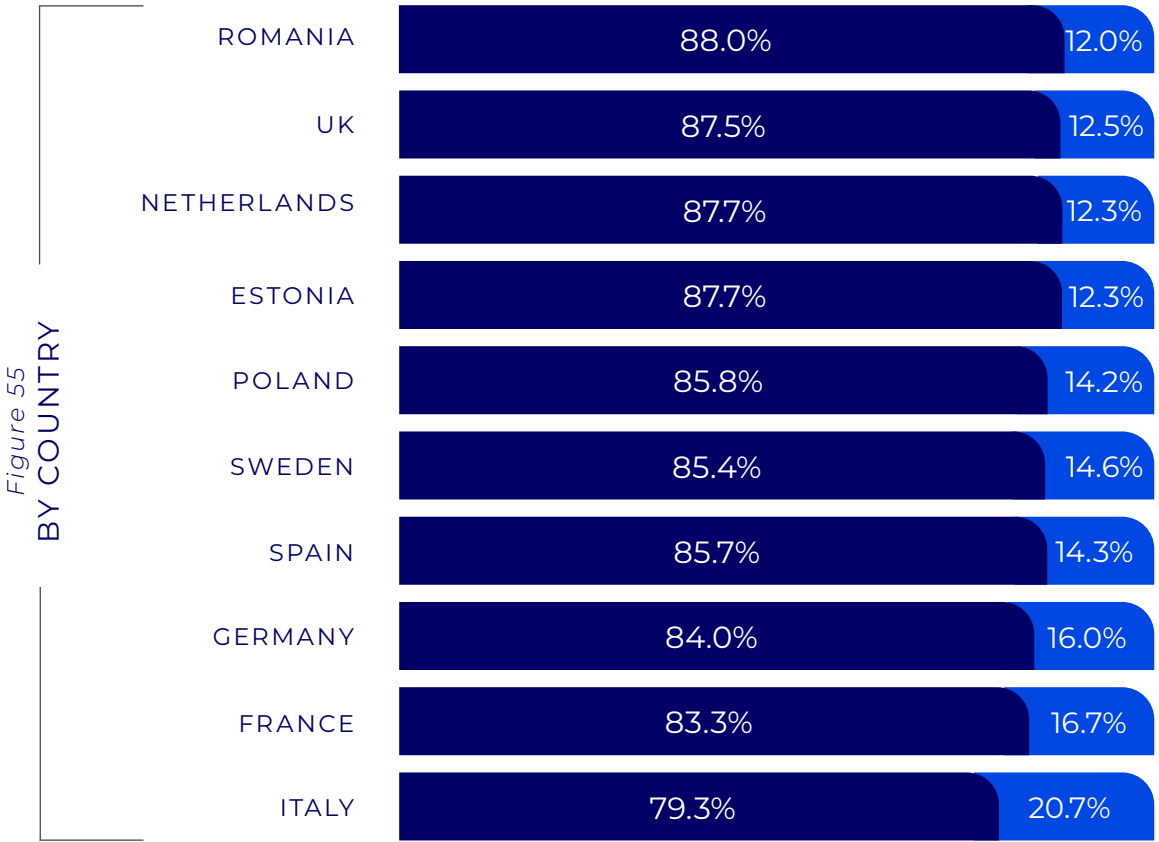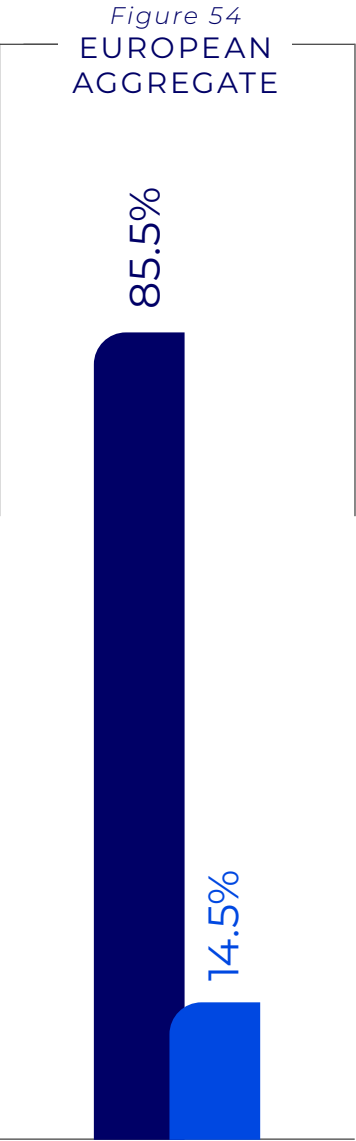
#21

TRUST IN THE AGE OF ALGORITHMS

- **An overwhelming of Europeans (85.5%) believe that online content should clearly disclose when AI has been used to create it → *Figure 54*.**

- Two in ten Europeans aged 18 to 24 — and a similar share of Italians — believe it is not necessary → *Figures 55 and 56*.

YES

NO

Figure 54
EUROPEAN AGGREGATE

85.5%

14.5%

Figure 55
BY COUNTRY

Country	YES	NO
ROMANIA	88.0%	12.0%
UK	87.5%	12.5%
NETHERLANDS	87.7%	12.3%
ESTONIA	87.7%	12.3%
POLAND	85.8%	14.2%
SWEDEN	85.4%	14.6%
SPAIN	85.7%	14.3%
GERMANY	84.0%	16.0%
FRANCE	83.3%	16.7%
ITALY	79.3%	20.7%

Figure 56
BY AGE

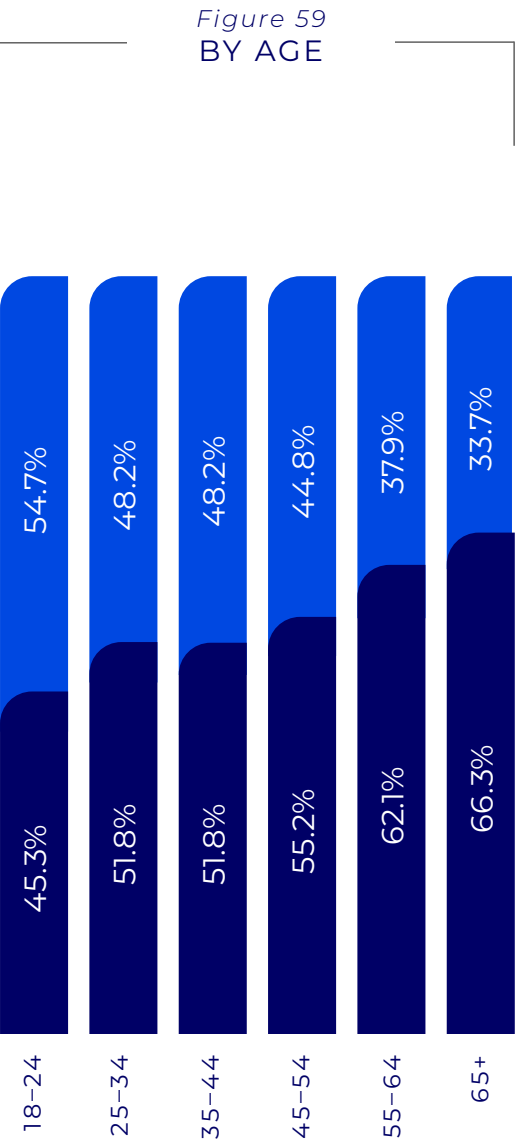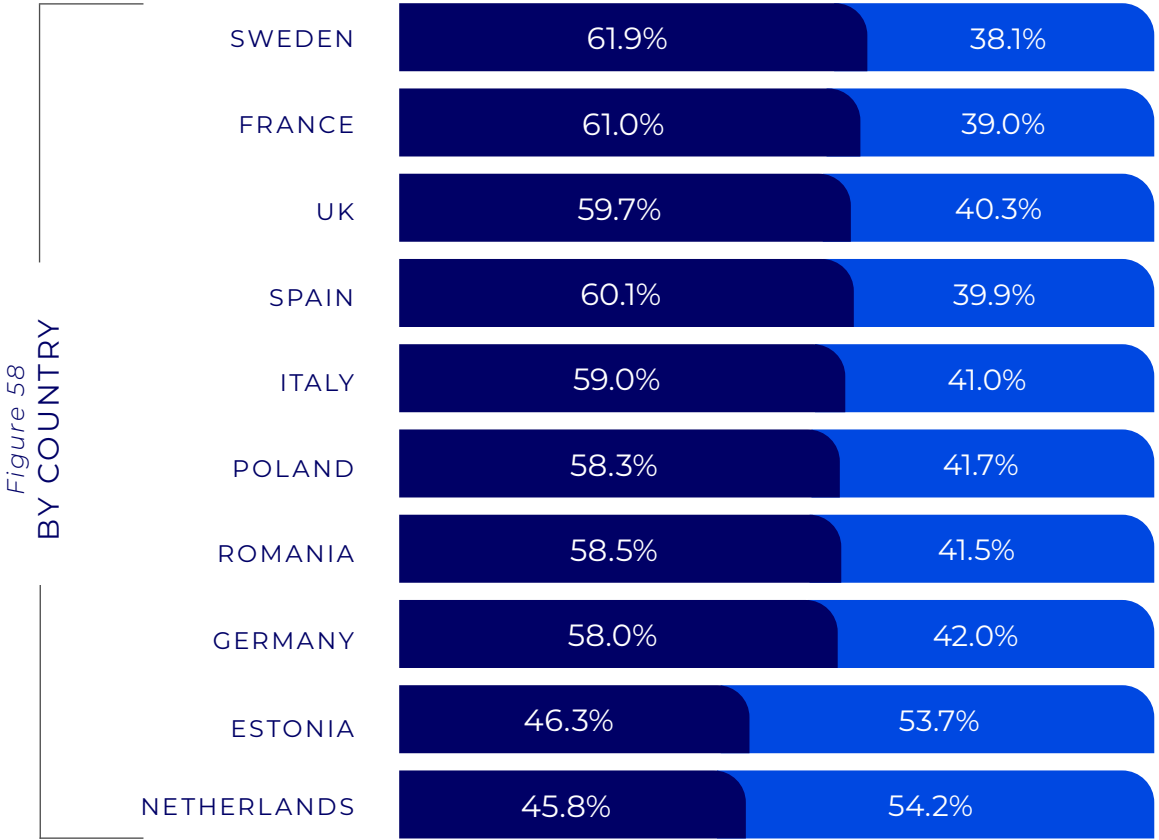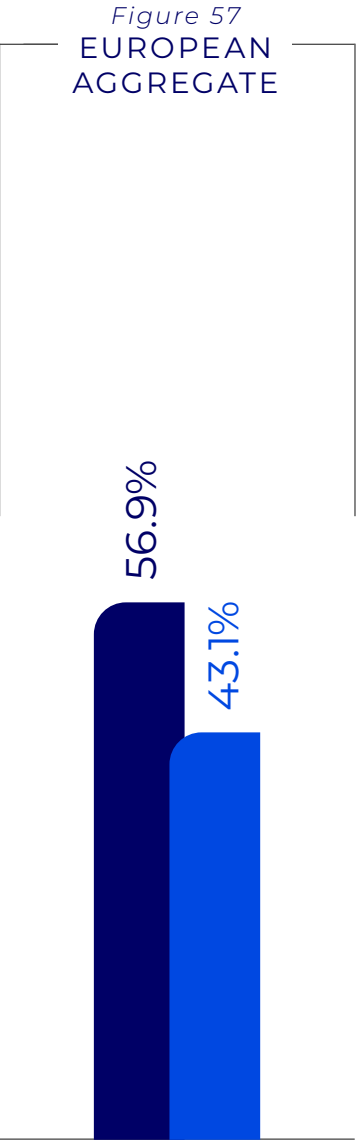| Age	NO	YES
18–24	20.7%	79.3%
25–34	17.4%	82.6%
35–44	17.4%	82.6%
45–54	14.5%	85.5%
55–64	12.1%	87.9%
65+	9.8%	90.2%

EUROPEAN TECH INSIGHTS **2025**

TRUST IN THE AGE OF ALGORITHMS

- **Most Europeans (56.9%) feel that algorithms show them what is popular rather than what they truly like → *Figure 57*.**

- Younger Europeans (18–24) are more likely to feel that algorithms show them what they really like (54.7%), while older respondents believe algorithms only promote what's most popular → *Figure 59*.

- The Netherlands and Estonia are the only countries where a majority of citizens (around 54%) feel that algorithms show them what they genuinely like → *Figure 58*.

QUESTION: When algorithms recommend content to you, do you feel they show what you really like, or just what's most popular?

■ YES
■ NO

Figure 57
EUROPEAN AGGREGATE

56.9%
43.1%

Figure 58
BY COUNTRY

	YES	NO
SWEDEN	61.9%	38.1%
FRANCE	61.0%	39.0%
UK	59.7%	40.3%
SPAIN	60.1%	39.9%
ITALY	59.0%	41.0%
POLAND	58.3%	41.7%
ROMANIA	58.5%	41.5%
GERMANY	58.0%	42.0%
ESTONIA	46.3%	53.7%
NETHERLANDS	45.8%	54.2%

Figure 59
BY AGE

	18–24	25–34	35–44	45–54	55–64	65+
NO	54.7%	48.2%	48.2%	44.8%	37.9%	33.7%
YES	45.3%	51.8%	51.8%	55.2%	62.1%	66.3%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.
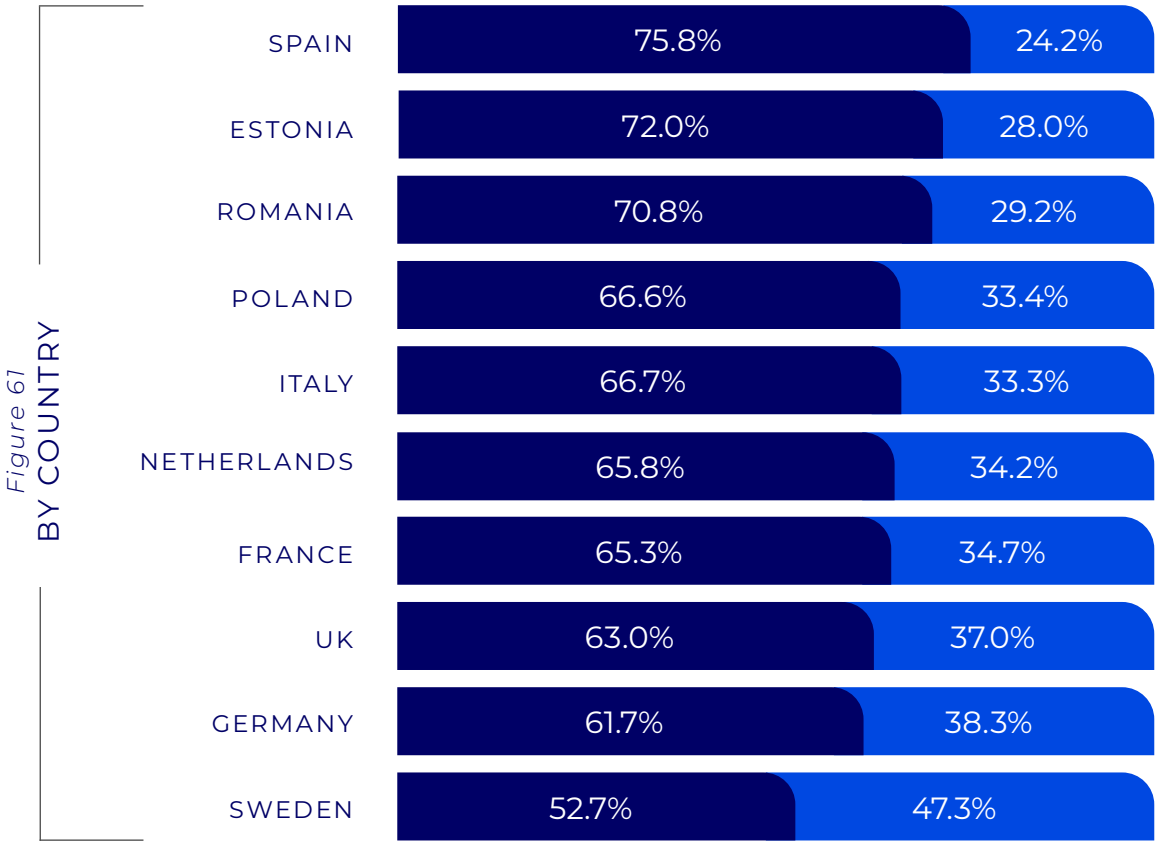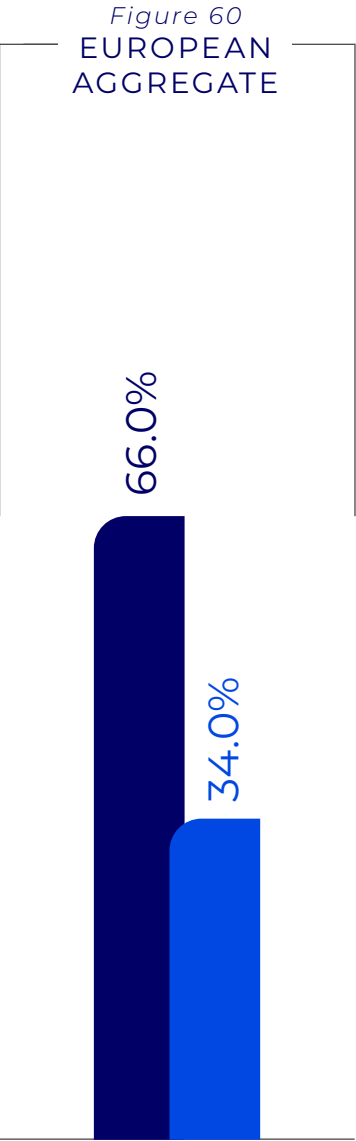
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TRUST IN THE AGE OF ALGORITHMS

- **Two-thirds of Europeans are concerned that algorithms reduce cultural diversity, leading people to consume similar cultural products → *Figure 60*.**

- Concern is highest in Spain (75.8%) and lowest in Sweden (52.7%), highlighting divergent views across Europe → *Figure 61*.

■ YES

■ NO

Figure 60
EUROPEAN AGGREGATE

66.0%

34.0%

Figure 61
BY COUNTRY

Country	YES	NO
SPAIN	75.8%	24.2%
ESTONIA	72.0%	28.0%
ROMANIA	70.8%	29.2%
POLAND	66.6%	33.4%
ITALY	66.7%	33.3%
NETHERLANDS	65.8%	34.2%
FRANCE	65.3%	34.7%
UK	63.0%	37.0%
GERMANY	61.7%	38.3%
SWEDEN	52.7%	47.3%

Source: European Tech Insights 2025. Center for the Governance of Change, IE University.

SURVEY METHODOLOGY

Responses from
3,010 adults

Spanning
10 countries

European Tech Insights 2025 was conducted in October 2025. In this study, we gathered responses from 3,010 adults spanning ten countries:

- Estonia,
- France,
- Germany,
- Italy,
- the Netherlands,
- Poland,
- Romania,
- Spain,
- Sweden,
- and the United Kingdom.

The samples maintained a representative balance with regards to age, gender, region and studies.

Respondents were part of recurrent panels recruited by Netquest or affiliated companies into panels via social media, direct mailing or through referrals from other respondents. They receive small in-kind incentives for responding to each survey.

Since its inception in 2019, this survey has become a cornerstone project of IE University. Each year, we develop a new set of questions to delve into the emerging challenges at the intersection of society and technology.

In creating the graphs, all figures we rounded to the nearest first decimal for simplicity, but we used the exact values to build the graphs. If graphs show the same rounded number but different volumes, it's because the precise values were different, but rounded to the same whole number.

AUTHORS

Carlos Luca de Tena,
Executive Director, CGC

Carlos Luca de Tena Piera is the Executive Director of the Center for the Governance of Change at IE University, where he leads cutting-edge research and impact initiatives at the intersection of public policy, technology, and governance. A public policy specialist, Carlos has advised multilateral organizations and multinational companies in public affairs and technology governance.

He previously worked as a Consultant at Llorente & Cuenca and APCO Worldwide. engaging with political and regulatory authorities and providing clients with public policy guidance and strategic counsel, notably within the Digital Economy space. Prior to that, he was in charge of European Affairs at the French Association of Town Mayors.

Carlos holds a master's degree in European Affairs from Sciences Po Paris and the University of Bath and studied as an undergraduate at Sciences Po Paris, Universidad Carlos III de Madrid and the London School of Economics.

Irene Pujol,
Junior Manager, CGC

Irene Pujol is Junior Manager at the Center for the Governance of Change. She is a young sociologist with broad international experience specializing in understanding and addressing how structural changes —technological, economic, and cultural— shape the way we think, behave, and connect with one another. She holds a Bachelor's degree in European Studies from Maastricht University and a Master's degree in Geopolitics & Strategic Studies from Carlos III University.

Prior to joining the CGC, Irene worked for three years as Data & Analysis Manager for The Carter Center's Conflict Resolution Program in Mali, where she led the creation of a conflict mapping database and a baseline survey in areas under jihadist control. As an advocate for youth empowerment and mental health, she co-founded Equipo Europa in 2019 and Generation Kintsugi in 2022 and is often involved in initiatives to promote intergenerational dialogue and civil society participation in public policy.
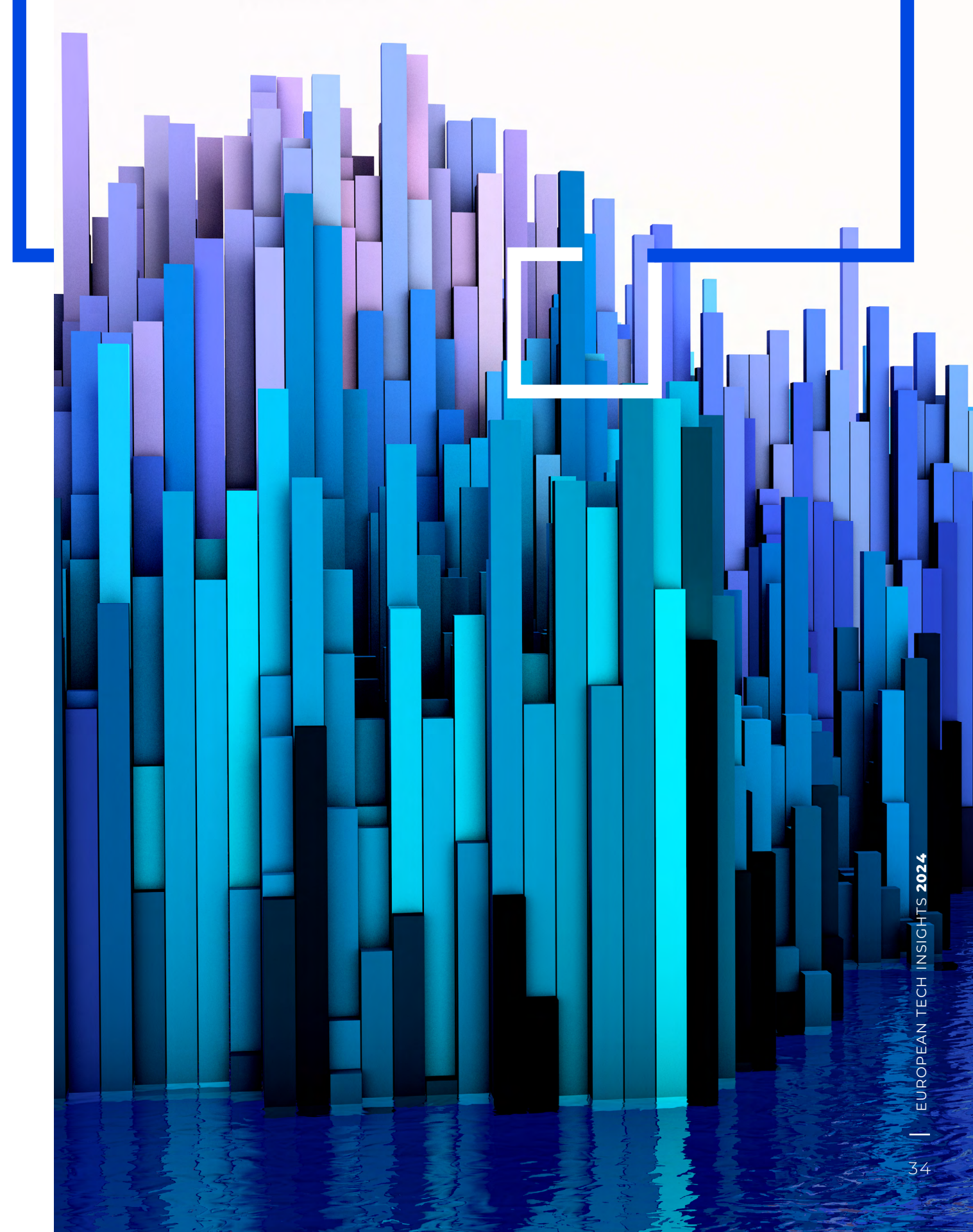
ABOUT THE CGC

The Center for the Governance of Change (CGC) is an applied-research, educational institution based at IE University that studies the political, economic, and societal implications of the current technological revolution and advances solutions to overcome its unwanted effects.

The CGC does so by producing pioneering impact-oriented research that cuts across disciplines and methodologies to unveil the complexity of emerging technologies such as Artificial Intelligence, Big Data, Blockchain, and Robotics, and explore its potential threats and contributions to society.

Moreover, the CGC also runs a number of executive programs on emerging tech for public institutions and companies interested in expanding their understanding of disruptive trends, and a series of outreach activities aimed at improving the general public's awareness and agency over the coming changess.

All this for one purpose:

TO HELP BUILDING A MORE PROSPEROUS AND SUSTAINABLE SOCIETY FOR ALL.