



Trump is back, worse than last time. Is Europe ready?

by Ian Bond, 11 February 2025

Donald Trump's America is an unreliable ally. Individual European states will be tempted to hope Trump attacks someone else. They must work together instead, to reduce their dependency on America.

US President Donald Trump's first weeks back in office have encouraged US adversaries and unsettled US allies. Among other things, he has continued to demand that Denmark cede [Greenland](#) to the US; [repeated](#) the false claim that the US subsidises Canada and said that it should become the 51st state; and allowed billionaire businessman Elon Musk to start [dismantling](#) the federal government. For at least the next four years, and probably beyond, Europe will not be able to rely on the US as an economic or security partner. It will need to defend its interests more vigorously, with the US where it can and against it where it must.

In Trump's first term, European leaders largely managed to keep the transatlantic partnership intact, through a mixture of [flattery](#), [sleight of hand](#) and deft manoeuvring by Atlanticists in Trump's administration. This time, however, Trump's actions and rhetoric are a direct threat to the economic and security interests of the US's European partners – including the UK.

The first instinct of many leaders will be to ignore much of Trump's bluster, in the hope that his second term, like his second [inaugural address](#) on January 20th, will reprise many of the themes of his [first](#). They may recall that the US's trade deficit with the EU [increased](#) by more than 30 per cent in Trump's first term, despite his promise in 2017 to 'buy American'. Trump's stay of execution on the tariffs he announced against Canada and Mexico may encourage this sort of thinking. But Trump looks more dangerous in his second term than his first.

For at least the first two years of his term, Republicans, more Trump-friendly now than in 2017-2019, will control both houses of Congress, so he faces less domestic resistance to his ideas than he did before. Many of those who own or control the media, including social media, are either his active supporters,

like Musk, or have decided that nothing is to be gained from standing up to him. There are fewer ‘grown ups’ in his administration to make the case for a more traditional American foreign policy, and more ‘true believers’, dedicated to putting Trump’s ideas, however wild, into practice.

Trump has already shown his contempt for the basic tenets of international law to which Europeans attach so much importance, including respect for the sovereignty and territorial integrity of other states. He has refused to [rule out](#) the use of military force or economic coercion to seize Greenland or the Panama Canal, [suggested](#) that the US would take over Gaza, and promised in his inaugural address that America would expand its territory. Such statements give Vladimir Putin and others with designs on their neighbours’ territory the opportunity to claim that they are only doing what the US intends to do. Trump’s [decision](#) to impose sanctions on the International Criminal Court (ICC) undermines the court’s ability to pursue not only Israeli officials accused of war crimes in Gaza, but Putin and Mariya Lvova-Belova (Russia’s commissioner for children’s rights), the subject of ICC arrest warrants for abducting children from occupied areas of Ukraine.

Trump’s approach to tariffs and trade is also damaging European interests and the global economy. CER colleagues have [written](#) previously about the direct effects of tariffs designed to reduce the US’s trade deficits with trading partners, as well as the risk that high tariffs against China will lead to low-cost Chinese goods being dumped in Europe. Europe may be able to avoid some tariffs (as in Trump’s first term) by agreeing to shrink its trade surplus by buying more from the US – potentially including liquefied natural gas (LNG) and arms. The EU also has capacity to retaliate against US tariffs, which will raise the political and economic cost for Trump. But Trump’s willingness to use tariffs or the threat of tariffs to extract unrelated political concessions – as in the case of Canada and Mexico – has introduced a further element of unpredictability. Even if Trump never imposes additional tariffs on Canada or Mexico the uncertainty will now make investors think twice before basing production for US consumption in those markets. The same applies to other potential targets for US tariffs, including Europe. US tariffs and retaliatory measures by others are likely to encourage fragmentation of global markets, as countries and trading blocs seek to limit their exposure to Trump’s caprices and China’s responses.

Besides the general risk of international disruption, there are three specific areas in which Europeans should be concerned about Trump’s intentions.

★ The first is the Middle East. Trump’s [proposal](#) to buy Gaza and make it available for redevelopment, [endorsement](#) of the ethnic cleansing of the area and willingness to [flirt](#) with supporting Israeli annexation of the occupied West Bank will make it very challenging to argue against breaches of international humanitarian law elsewhere. But if the US were to take control of Gaza, as Trump has proposed, or recognise the West Bank as an integral part of Israel, it would not only be committing and endorsing grave violations of international law; the practical outcomes would almost certainly include a resumption of violence in the Middle East, the destabilisation of US allies like Egypt and Jordan, the radicalisation of Palestine’s supporters in Western Europe and an increased terrorist threat to Western interests in the Middle East and beyond.

★ The second is the Global South, and especially Africa. US Secretary of State Marco Rubio has [announced](#) that he will boycott the upcoming G20 foreign ministers’ meeting in South Africa. Trump (or perhaps his enforcer, Elon Musk) has [stopped](#) almost all US Agency for International Development (USAID) activity in the Global South, terminating aid projects immediately. This will cause immense suffering in a large number of countries, particularly in Africa. US aid makes

up [almost 30 per cent](#) of governmental development assistance globally (though not all of this may be caught by the action against USAID). Apart from any altruistic motives for giving it, development assistance is an important soft power tool. China and Russia have already been increasing their influence, notably in Africa, at the expense of the West. China offers investment and loans; Russia offers mercenaries; and, unlike Western donors, neither imposes awkward conditions relating to human rights or good governance. Both are gaining more control over deposits of critical raw materials such as uranium in Niger (Russia) or cobalt in the Democratic Republic of Congo (China). Europe could end up with even greater migration flows from countries in the Sahel where Russia is active, and see China's political influence and dominance of global supplies of critical raw materials grow.

★ The third is Europe itself, in relation to Ukraine, NATO and European domestic politics. Though Trump has failed to fulfil his campaign pledge to end the war in Ukraine within a day of taking office, he still seems to be prioritising a quick ceasefire over a sustainable peace and the provision of reliable security guarantees to Kyiv – taking no account of Ukraine's objectives, let alone the wider interests of European countries.

★ In his first post-inauguration television [interview](#), Trump criticized Zelenskyy for fighting back when Russia attacked in 2022: "He shouldn't have done that.... I could have made that deal so easily, and Zelenskyy decided that 'I want to fight'". And in relation to security guarantees, Richard Grenell, one of Trump's special envoys and a former acting director of national intelligence, [warned](#) that talk of Ukraine joining NATO would "run into a big buzz saw in America", unless Europeans were paying for its defence.

★ Trump is no fan of NATO. He [reportedly](#) had to be talked out of pulling the US out of the alliance during his first term. He has [said](#) that NATO's European members should spend 5 per cent of GDP on defence – much more than the 3.4 per cent the US itself is currently [spending](#). There is a significant risk that Trump will make a bad deal with Putin over the heads of Ukraine and European countries; force Ukraine to accept it by turning off the flow of US assistance; and leave Europe exposed to further Russian aggression by encouraging Putin to believe that the US would not live up to its NATO mutual defence commitments.

★ Meanwhile, Trump seems to be doing nothing to rein in Musk, who is using X to amplify far-right propaganda, undermine mainstream parties and support extremist politicians in Europe – whether [Stephen Yaxley-Lennon](#) (aka Tommy Robinson) in the UK or [Alice Weidel](#) of the *Alternative für Deutschland* in Germany. At a time when anti-democratic forces are on the rise in Europe, a member of Trump's inner circle is helping their progress. Musk's proximity to Trump makes it politically risky for European regulators to tackle hate speech and disinformation on X and to enforce EU and national laws.

Almost every leader in Europe – even French president Emmanuel Macron, for all his talk of European strategic autonomy – would rather be able to work alongside the US than alone. Even when there have been political differences between European and US leaders, it has generally been possible to maintain at least transactional relations. But – as the legal commentator David Allen Green has recently [observed](#) – Trump is not transactional but anti-transactional: he is an extortionist, as his approach to NATO obligations shows.

Europeans have to accept that for at least the next four years, and probably beyond, their interests and US policies will frequently not be aligned. There is a danger that their response to the new situation will be divided: some governments will decide to stick with the US, right or wrong, in the hope that Trump will send US forces to defend them even if NATO itself becomes a dead letter; some will demonstratively distance themselves from Trump, in the way that France and Germany distanced themselves from George W Bush when he invaded Iraq; many will keep their heads down, hoping that Trump will attack other partners and leave them alone.

Europe, however, cannot afford to leave the defence of its interests to a president who is not interested in Europe, except as the target of attacks on its trade surpluses and inadequate military budgets. It needs to identify its own objectives and invest in achieving them, regardless of what Trump does.

In the Middle East, Europe needs to defend international law – both in public statements critical of Trump's actions, and by imposing financial costs on Israel for violating it – and work with Arab countries to reconstruct Gaza and enable its population to return to their homes. In the Global South, it needs to fill the gaps left by the US's withdrawal and use trade, development aid and other soft power tools to compete successfully with what China and Russia are offering. The fact that the EU is now the only one of the three major trading blocs committed to rules-based trade could even give it a competitive advantage.

In Ukraine, Europe needs to recognise that the costs of Russian victory, or a quick ceasefire that imposes bad terms on Ukraine, would be much higher than the investment needed to secure Ukrainian success. Europe must continue to increase European defence spending and capabilities rapidly – initially buying military equipment wherever it is available, including from the US. Europeans need to help Ukraine develop its defence industrial capacity and rebuild its forces, backed up if necessary with European troops on the ground. Europe needs to reassure Ukraine that it does not have to accept whatever deal Trump and Putin concoct, because the only alternative is defeat. And it needs to be willing to offer Ukraine concrete and credible defence guarantees, with or without US backing.

Trump poses particular dilemmas for the UK – outside the EU, and with its defence and intelligence communities uniquely entangled with those of the US. The appointment of [Peter Mandelson](#) as the next British ambassador in Washington suggests that the government is determined to show that the 'special relationship' will remain special. London may be able to accommodate Trump to some extent: it can afford to keep a low profile and avoid challenging him directly in the Middle East; it can look for ways to increase aid to countries in Africa, to compensate for Trump's cuts. Unlike the EU, it has a small trade deficit with the US (according to [US data](#)), so is less likely to face tariffs. But Musk's [attacks](#) on Keir Starmer and his promotion of Reform UK and other right-wing movements should be a warning that a good relationship with Trump may not last long. Above all, the UK cannot afford to go along with a Trump-Putin carve-up of European spheres of influence that would leave all of Europe more vulnerable to Russian neo-imperialism.

When Trump won his first presidential election in 2016, he and his team were [reported](#) to have been unprepared for office, not having expected to win. Europe was equally uncertain how to deal with him. The American journalist Salena Zito [wrote](#) that the press took him literally, but not seriously, while his supporters took him seriously, but not literally. Europeans came to see that his supporters were closer to the truth: Trump might not always do exactly what he said he wanted to (whether building a wall on the Mexican border, or walking out of NATO), but his threats had to be taken seriously, even if they were not

carried out, because of their damaging effects. In his second term, he and those around him seem clearer in their aims and more determined to carry out their plans. European leaders need to take Trump both literally and seriously this time.

De Gaulle claimed that Churchill told him during World War Two that if Britain had to choose between Europe and the open sea, it would always choose the open sea. Now that Trump is on the other side of that sea, however, the UK and Europe need to build bridges across the Channel as quickly as possible. Keir Starmer's meeting with EU leaders on February 3rd, at which they discussed defence and security co-operation, was a step in the right direction. Now all European leaders will need to work hard to compensate (at least in part) for diminishing US commitment to the transatlantic relationship and to global norms.

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