

# FOREIGN AFFAIRS

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Weaknesses

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**I**n February 2024, we published an article in *Foreign Affairs* urging Europe to prepare for a possible U.S. abandonment. We were right to ring the alarm bell. Donald Trump's reelection in November rendered the prospect of the United States turning its back on Europe more real than ever. After four years of close partnership with President Joe Biden's administration on dealing with Russia's war against Ukraine and managing economic dependencies on China, Europe now must prepare for a new U.S. leader who often treats the continent with contempt and vows to prioritize a narrow reading of the United States's self-interest over cooperation with allies. Trump has declared his intention to end the war in Ukraine on his first days in office—even on

terms disadvantageous to Europe—and continues to threaten to impose tariffs on all imports into the United States.

Europe did not sit idly by as Trump regained traction. Since Russia's illegal occupation of Crimea in 2014 and particularly since its full-scale invasion of Ukraine in 2022, European leaders have substantially increased their countries' defense spending and their support for Ukraine. EU countries are now collectively spending more than two percent of their GDP on defense, up from just over one percent at the time of Trump's first presidential victory in 2016, with some members, such as Estonia and Poland, investing a higher proportion of their GDP in defense than the United States does. The EU has outpaced the United States' support for Ukraine since February 2022, with member states and the alliance providing Kyiv with nearly \$109 billion in military, financial, and humanitarian aid compared with the United States' \$90 billion.

But with a possible U.S. disengagement looming, Europe will need to do more quickly to ensure its own security in the face of Russian hybrid attacks against its infrastructure and society and an ongoing land war on the continent. It will also need to prepare for economic warfare. The European Commission has initiated an ambitious economic program prioritizing growth through European market integration, innovation, accelerated digital and energy transitions, and greater economic security measures. But given Trump's intent to impose broad tariffs, the continent may well face major economic risks from incoherent American macroeconomic and trade policies that disrupt the global economy on which Europe depends. Europe needs to maintain its openness to global trade, but it cannot afford to absorb the fallout of Trump's tariffs and excess Chinese investments in manufacturing capacity.

On the eve of a second Trump term, the United States and Europe have rarely appeared so at odds. Yet U.S. disengagement will offer Europe an opportunity to stand on its own feet and show the world that it can be a reliable ally in places where the United States starts to fall short. It will also force Europe to make a fresh and stronger case to the United States that Washington shares interests with other Western allies. Europe must

make it crystal clear to the Trump administration that abandoning its allies will in fact weaken the United States by emboldening its rivals.

#### SELF DEFENSE

The most important priority of European governments is to secure their continent. The European security order hinges on holding Russian President Vladimir Putin's imperialist ambitions at bay. On the day that Trump won reelection, Dmitry Medvedev, the deputy chair of Russia's Security Council, announced that "the objectives of the special military operation [in Ukraine] remain unchanged and will be achieved"—a rejoinder to Trump's campaign pledge to end the war immediately. Ukrainian President Volodymyr Zelensky has signaled that he might be willing to agree to a cease-fire that includes some loss of territory in exchange for credible security guarantees such as Ukraine's admission to NATO and support for its defense. But Keith Kellogg, the incoming U.S. special envoy for Ukraine and Russia, has said that the United States should bring Ukraine to the negotiating table by withholding weapons and suggested that a cease-fire built on Ukraine's acceptance of a de facto long-term Russian occupation of eastern Ukraine could be on the table. And although Zelensky wants NATO membership and ongoing U.S. military aid to ensure that the rest of the country remains independent and sovereign, neither the United States nor Russia currently seems ready to agree to such terms.

European governments need to make it clear that they will not support any U.S. effort to coerce Ukraine into a cease-fire based on Trump's calculations about his own political expediency. They must commit to providing Ukraine with the military equipment it needs to stop Russia's ongoing battlefield advances and to prevent a cease-fire with terms that would undermine the will and the interests of Ukraine, fail to guarantee sustainable security in Europe, and embolden Russia. Senior figures in the incoming Trump administration see a peace agreement as a way to draw down U.S. weapons deliveries to Ukraine in order to reserve them for a potential conflict with China. But given that Russia's rate of production of key munitions and weapons systems currently outpaces that of the United

States and Europe combined, if a weak cease-fire were signed, Russia could quickly build the capacity to keep pursuing its imperial ambitions and strike EU countries.

A Europe without U.S. forces, weapons, or security guarantees for Ukraine is now in the realm of possibility. But as undesirable as this scenario may be, European countries are capable of finding a homegrown solution. If a cease-fire is established, European countries will, at a minimum, need to monitor and enforce its likely fragile framework and provide strong security guarantees and support for deterrence and Ukraine's (and more broadly Europe's) defense. Since 2016, European countries have doubled their spending on weapons and military equipment purchases as a percentage of GDP from 0.3 to 0.6 percent. European political leaders of such varied ideological stripes as the Social Democratic defense minister of Germany, Boris Pistorius, and the Conservative candidate for the country's chancellorship, Friedrich Merz, agree that defense spending needs to increase significantly. Brussels's recent decision to borrow up to \$50 billion against future revenues from seized Russian assets, mostly frozen in the EU, to ensure financial support for Ukraine in 2025 signals that the EU is ready to take the defense of Ukraine onto its own balance sheet.

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But Europe must further increase its defense industrial production to address current limitations on the supply of U.S. weapons on which Europe still depends. Even before Trump's reelection to the White House, the United States had become difficult to count on for the timely delivery of weapons. Delays in the production and delivery of systems built in the United States, such as F-35 fighter jets, air defense missiles and control systems, and the submarines provisioned in the AUKUS agreement with Australia and the United Kingdom, now pose a problem for maintaining deterrence. With war continuing to rage on the continent, Europe must become more self-sufficient so that the sovereignty of Ukraine is not tied to high weapons

prices and insufficient manufacturing capacities for critical high-end systems.

The European Commission has just created the position of defense commissioner, an office charged with boosting European countries' defense production and reducing prices by using the scale of the alliance's single market. To achieve these goals, larger and more reliable long-term budgets are needed. The bulk of the defense budget will continue to come from EU countries' national budgets. An additional European fund of up to \$500 billion will help further ramp up European production and acquisition of modern technologies such as long-range strike weapons, air defenses, and precision-guided munitions, as well as critical strategic capabilities such as drones and space intelligence and communications systems. Collective funding by a coalition of European countries, including non-EU members such as Norway and the United Kingdom, could ensure more centralized military procurement among states, keeping costs down in an otherwise fragmented market, and prevent investment from being held hostage by the vetoes of individual countries such as Hungary. European policymakers will also need to reform environmental, social, and governance rules that currently restrict adequate investment in defense companies.

Trump's enactment of a swift de facto U.S. withdrawal from European security commitments, along with a proposed reduction of aid to Ukraine and wavering on NATO security guarantees, would send a signal to U.S. allies (and enemies) that Washington cannot be counted on. NATO Secretary-General Mark Rutte recently stressed that China, Iran, and North Korea will be studying the way the Trump administration deals with Ukraine in order to craft their own foreign policies. But the United States' increasingly ambivalent commitments to its allies also creates an opportunity for Europe to show that it is ready to fill gaps in the security order.

#### SEPARATE FINANCES?

Trump's presidency also appears likely to disrupt the global economy. U.S. tariffs against all foreign producers have the potential to substantially

reduce global trade and hurt European companies. Beijing has already responded to the prospect of economic warfare by lowering interest rates and weakening its currency to offset the effects of Trump's proposed tariffs and boost China's exports to the world. Europe still needs to define its response to avoid being squeezed between incoherent U.S. policies and China's responsive maneuvers.

It remains unclear whether Trump will repeat his first-term strategy of imposing selective tariffs on Chinese imports as well as on solar panels, steel, and aluminum from countries around the world or if he will follow through on his more recent threats to levy much stiffer, broader tariffs. If he does the latter, such tariffs could severely crimp EU exports to the United States. Making matters worse, as the U.S. market closes its doors, Chinese exports could be redirected to the continent, threatening domestic industrial production, and elsewhere, creating new competition in third markets for European products. Although competition for industrial production on its own would not pose a problem for Europe's markets, the combination of Trump's policies and the Chinese response would flood the European market and undermine growth for years to come.

To avoid economic chaos, the European Commission should prepare a four-pronged strategy. First, it should try persuasion by negotiating with the United States to expand European countries' purchases of liquid natural gas and reduce obstacles to transatlantic trade, including nuisance tariffs and regulatory disparity in critical industries such as chemicals and pharmaceutical products. In other areas, however, the EU should stand firm. JD Vance, the U.S. vice-president-elect, has suggested that Trump's proposed tariffs could be used as a bargaining chip to secure more favorable regulatory treatment of U.S. tech companies, but Europe must not allow the Trump administration to force changes to its regulatory vision for technology.

Second, the EU should devise a credible retaliation strategy to increase its leverage in negotiations and prevent a tariff war. Well-targeted

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countermeasures, including tariffs on EU imports from the United States, could help motivate U.S. businesses to pressure their own government against tariffs. The EU should prepare a list of potential retaliatory actions, and it should be ready to deploy them.

Next, Europe must commit to integrating its single market, which remains too fragmented—especially in the areas of services, energy, technology, and capital markets—to boost domestic demand and improve productivity. But any revitalization of Europe’s economy must not come at the expense of economic engagement abroad. Europe has greatly benefited from an open trade system, and it should reject protectionist impulses and continue to expand its diverse portfolio of economic relationships. In early December, the EU signed a partnership agreement with another of the world’s largest trading blocs—the Southern Common Market, or Mercosur, composed of Argentina, Brazil, Paraguay, and Uruguay. This agreement paves the way for enhanced trade and economic opportunities as well as greater geopolitical and security cooperation, including on the security and resilience of supply chains and critical minerals, as well the fight against deforestation and climate change more broadly. Brussels should pursue similar agreements with other trading blocs, including the countries that make up the Comprehensive and Progressive Agreement for Trans-Pacific Partnership. And if the Trump administration does impose a universal tariff, the EU could work with the affected countries around the world, including China, to avoid escalation by agreeing not to impose tariffs on one another.

At the same time, however, Europe and the United States should not lose sight of the fact that they share an interest in nudging China to rebalance its economy and reduce its excess manufacturing capacity. Both Europe and the United States also seek to bolster their economic security against Chinese cyber-risks and Beijing’s dominance of supply chains for critical minerals. European fiscal and monetary policymakers should therefore reach out to the new administration to discuss how to cooperate



on reducing excessive dependence on Chinese supplies in areas critical for national security. They should also jointly negotiate with China to make clear that China needs to boost domestic demand.

#### GREEN MEANS GO

The global climate crisis has worsened since the first Trump administration, when Trump withdrew the United States from the Paris climate accord. As a candidate in the 2024 U.S. presidential election, Trump again confirmed his contempt for the green agenda and indicated that he will drop restrictions on oil and gas drilling. If the incoming U.S. government shows no interest in cooperation on climate policy, European governments must continue to work below the federal level by partnering with individual states and businesses to advance the development of green technologies and reduce carbon emissions. Regardless of Trump's campaign rhetoric, U.S. states with significant green investments, be they blue or red, are likely to take a pragmatic approach, opting to use green technology in industries in which it has become cheaper than using fossil fuels or in which renewables have become key to the stability of the power grid, as is the case in Texas. And in places where green investments generate good jobs—such as in Georgia, where the electric vehicle industry is fueling employment—funding is likely to be maintained, even if Republicans control the state government.

But Europe must not forget that the U.S. federal government has some shared green technology interests that make partnership practical. If the European Commission attempts to collaborate with the United States on the security of green supply chains—in particular to reduce dependencies on critical raw materials, in which China holds a quasi-monopoly—the Trump administration is more likely to entertain these overtures.

#### FOUNDATIONAL VALUES

When Trump was elected in 2016, the first wave of European populism had already crested. By the time he took office, it had become clear that Brexit was leading the United Kingdom toward economic disaster, dimming other European countries' enthusiasm for exiting the EU and

instilling in the remaining member states a refreshed sense of unity. Trump's reelection, however, coincides with a new rise of populism in Europe, as exemplified by gains made by far-right ultranationalist parties in Austria, Germany, Italy, the Netherlands, and Slovakia, and most recently in Romania. Many of these parties are intent on changing the EU from within by reimposing nationalist policies in areas such as migration, security, and budgetary contributions to the alliance.

Europeans have the right to vote for the political parties of their choice, and some nationalist policies merit serious discussion. But the core principles of liberal democracy, such as the rule of law and the integrity of elections, which many of Europe's insurgent parties aim to undermine, need to be protected. Conditioning EU funding on the dominant parties' respect for the rule of law alone cannot ensure that democracy prevails. But the case of Poland, in which the Law and Justice Party's assault on the judicial system led to the EU withholding COVID-19 recovery funds until the government rolled back parts of its reforms, demonstrates that it can help prevent or limit a drift into autocracy.

In addition, the EU will need to strengthen its regulation of social media to prevent hybrid attacks by malign actors who work to manipulate national debates and elections. In Romania, millions of fake accounts spread Russian propaganda on the Chinese platform TikTok, which ultimately led the Romanian Constitutional Court to annul the first round of the country's presidential election. Elon Musk—the owner of the social media platform X, who has swiftly risen to become a political partner of Trump's—has been vocal in his support of extreme right-wing parties in Germany and the United Kingdom, prompting concerns that deliberate manipulation of the X algorithm is boosting the reach of ultra-right opinions. The EU should respond by passing rules that ensure that tech billionaires and foreign governments cannot drown out the full spectrum of voices expressed on these platforms.

#### NEW RULES OF ENGAGEMENT

Over the next four years, the bonds that unite the EU and the United States will be seriously tested. Any European approach that is premised on

an attempt to preserve a past iteration of the transatlantic relationship is bound to fail. But Europe and the United States can agree to disagree while respecting each other's core sensitivities, mostly those related to defense and security. A more transactional United States, which selectively chooses areas of cooperation with Europe and demands concessions from Europe in exchange, would still offer plenty of avenues for productive engagement.

The United States may still decide to go its own way. European countries should plan for either scenario by focusing on strengthening their economies and security. Boosting Europe's growth and resilience by investing in the continent's security, integrating European markets, pushing the green transition forward, safeguarding democratic norms, and filling the United States' leadership void by strengthening partnerships with countries around the world are measures that can be taken with or without a reliable partner in Washington. No matter what, Europe and the United States will continue to share many interests. European leaders should persistently stress that fact without losing sight of the opportunities a new era of U.S. disengagement will present.