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RESEARCH ARTICLE

Toward a post-American Europe? Trump as a catalyst for EU governance

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Abstract

This paper explores how Donald Trump's presidency and the broader repositioning of the United States in global affairs, have become a driving force reshaping EU governance. The paper argues that Trump functions less as an anomaly than as a catalyst, accelerating Europe's confrontation with unresolved questions of defense, foreign policy, and political coordination. The analysis examines three interrelated dynamics: the rebalancing of the transatlantic relationship, where conditional American security commitments have spurred EU and national initiatives; the evolving German role in EU defense, particularly rearmament dilemmas; and the emergence of a political nucleus for European defense and foreign policy through intergovernmental and minilateral cooperation. These dynamics suggest that Europe may be entering a post-American phase, not defined by rupture but by the potential – today still unfulfilled – for a rebalanced partnership with Washington and a more autonomous role in a multipolar international order.

Keywords Donald Trump · European defense · NATO · European Union · European foreign policy

1 Introduction

Trump's second mandate represents more than a domestic development in the United States, challenging the international order and the governance of the European Union (EU). His two presidencies disrupted many of the assumptions underpinning transatlantic relations: NATO's guarantees credibility, U.S. support for multilateralism and for the global liberal order. This forces the EU to reconsider its institutional and

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strategic architecture, especially in strategic core state powers: defense, security, and foreign policy (Genschel and Jachtenfuchs 2014).

The European project has experienced critical turning points whenever external shocks revealed its geopolitical dimension. The *Treaty of Maastricht* (1992) marked a "first geopolitical awakening" after the end of the bipolar order (van Middelaar 2019), embedding foreign policy, security, and monetary union into European integration process. Maastricht made visible the EU's ambition to be more than a market, extending political authority into strategic affairs. Those years were shaped by the belief in a unipolar international order dominated by the United States. Fukuyama's "end of history" thesis (Fukuyama 1992) epitomized the optimism of the early 1990s: liberal democracy and U.S.-led global order appeared destined to spread universally. Yet this order was immediately marked by contradictions: Balkan wars exposed the EU's dependence on American military power, and the Kosovo intervention (1999) demonstrated both the necessity of U.S. leadership and Europe's desire for a more autonomous role.

During the 2003 Iraq War, U.S. unilateralism divided Europe, with France and Germany resisting the war, while Eastern European states sided with Washington (Kagan 2003): it crystallized debates about Europe's capacity for independent foreign policy. This spurred the European Security Strategy (2003), which yet lacked instruments to translate ambition into power. The Lisbon Treaty (2009) introduced institutional innovations, but practical impact remained limited. The 2011 Libya intervention again demonstrated Europe's dependence: despite French and British leadership, U.S. assets were essential. President Obama famously described the U.S. role as "leading from behind," as even limited European action required American backing (Chivvis 2014). The Brexit referendum of (2016) compounded this fragility, removing one of Europe's two nuclear powers and strongest military actors. Meanwhile, internal crises shifted political energy inward.

It is in this fragile context that Trump first rose to power. His critique of NATO as "obsolete" (Parker 2016), his transactional approach to alliances, and disdain for multilateralism shocked Europeans. Yet his pressure for greater defense spending and European responsibility triggered new initiatives: the launch of PESCO in 2017, the creation of the European Defence Fund, and the articulation of "strategic autonomy" as a guiding principle. The COVID-19 pandemic and the war in Ukraine in 2022 accelerated EU's geopolitical awakening (see e.g. Council of the European Union 2022). Nonetheless, even in Ukraine, Europe's capacity was revealed as partial and dependent, as decisive military guarantees were provided by the U.S. through NATO.

Europe is now at another historical threshold. The unipolar order that emerged after 1989 is eroding. Trump epitomizes this transformation, symbolizing the decline of U.S. willingness to sustain global leadership on behalf of the "West." This might signal the dawn of a post-American Europe, a historical phase in which the EU must either consolidate governance in strategic policy fields or risk irrelevance.

This paper interprets Trump's second presidency as a stress test for EU governance, accelerating long-standing debates in the global setting. It analyses three pillars: (1) achieving a more balanced EU – US relationship, (2) the Europeanization of the "German question," and (3) the emergence of a political nucleus for defense and foreign policy. Through these, Trump's impact on EU governance may be understood

less as rupture than as catalyst for a new phase in integration—marking the passage from a unipolar, American-centered West to a more plural, uncertain, and balanced multilateral order.

2 Pillar I: Towards a more balanced EU – US relationship in defense and security

The first pillar concerns the relationship between the European Union and the United States in the field of defense and security. Since the creation of NATO (1949), structural asymmetry has marked transatlantic relationships: the U.S. has provided hard security guarantees, while Europe relied on American power to deter threats and stabilize the continent. This arrangement – unavoidable during the Cold War to balance the Soviet Union – was labeled as an "empire by invitation," since Europeans accepted dependency in exchange for security (Lundestad 2003). Yet this asymmetry persisted after the Cold War. Despite hopes that the end of bipolarity would allow Europe to define a more autonomous role, the 1990s and early 2000s confirmed continuity, as shown by the Balkan conflicts and the display of EU's limited military capacity during the Kosovo campaign (Howorth 2007).

Europe responded institutionally, but with modest results. In 1998 in Saint-Malo France and UK advocated for EU "capacity for autonomous action" (Howorth 2007), inaugurating the European Security and Defence Policy. The first security strategy of 2003 envisioned a rules-based international order but collided with Europeans' division during the Iraq War. Kagan described this divergence as the contrast between "Mars and Venus," with Americans practicing power politics and Europeans preferring law and institutions (Kagan 2003). The episode revealed the enduring need for U.S. leadership and the difficulty of forging European unity in defense. Similarly, in Afghanistan, Europeans contributed troops but relied entirely on U.S. command, logistics, and air power. In Libya in 2011, U.S. assets proved anew indispensable for surveillance, intelligence, and aerial refueling: despite being a European-led effort, without this support the mission could not have been sustained (Chivvis 2014). Obama's description of the U.S. as "leading from behind" well captures the paradox of Europe's activism within the boundaries of dependence.

Trump's first presidency (2017–2021) marked a rupture with previous patterns. By challenging the Atlantic – and European – alliance he shifted the perception of NATO from a community of values to a purely transactional arrangement (Haberman & Sanger 2016). Reports suggested that in 2018 he even considered U.S. withdrawal, alarming both European governments and American defense officials (Chollet & Goldgeier 2009). This paradoxically shock became a driver of European initiatives. Trump accelerated the operationalization of "strategic autonomy," a notion already articulated in 2016 EU Global Strategy. In 2017, the EU launched Permanent Structured Cooperation (PESCO), involving 26 member states committing to joint projects on capability development and readiness. The European Defence Fund (EDF), proposed in 2017 and active from 2021, introduced the unprecedented step of financing defense research and industrial cooperation from EU budget.

Since 2022, these initiatives have been reinforced by a broader industrial agenda. Alongside the EDF and the European Defence Industry Reinforcement through Common Procurement Act (EDIRPA), the Commission launched SAFE (Security and Defense Industry Action Plan for Europe), to ensure Europe a more competitive and resilient defense technological base. SAFE aims to stimulate cross-border projects, reduce fragmentation in procurement, and strengthen supply chains in critical domains such as ammunition, cyber, and space. Its purpose is to enable European industry to both meet the urgent needs generated by the war in Ukraine and prepare for long-term strategic autonomy. It encourages joint procurement and innovation, preventing excessive dependence on non-European suppliers, reinforcing EU's capacity to act collectively in defense (European Council, 2025).

With Trump's current presidency since January 2025, these dynamics have intensified. At the NATO Summit of June 2025, Trump announced a reduction of the U.S. financial contribution to NATO and declared that Article 5—the collective defense clause—could not be taken as "automatic" if allies failed to meet their obligations. As a result, Poland and the Baltic states rushed to reaffirm their loyalty to Washington by increasing defense spending, while, for leaders in Paris and Berlin, this stance confirmed that Europe could no longer rely on U.S. guarantees.

As proof of burden-sharing, Trump has also revived his demand that allies purchase American military equipment, rather than from European consortia such as Airbus or MBDA. This directly collides with the EU's efforts to build an integrated defense industrial base through the EDF, EDIRPA, and now SAFE. Brussels views these programs as essential to reduce dependency, while Trump openly frames them as protectionist schemes that discriminate against U.S. firms. The resulting tension highlights the strategic divergence between a transactional American approach and a European strategy oriented toward industrial sovereignty.

Relations with the EU institutions have cooled further as Trump has criticized regulatory policies and industrial initiatives as "anti-American" (Bomont 2025). His administration has slowed cooperation on joint defense projects and emphasized bilateral relations with selected European leaders, as illustrated by the meeting between Trump and Merz at the White House in spring 2025. Washington signaled openness to a privileged German-American channel, bypassing EU institutions. Similarly, Trump reinforces centrifugal tendencies inside the EU, cultivating ties with Viktor Orbán in Hungary, praised as a "very powerful, though leader" (Trump 2024).

At the same time, Trump's policies have had paradoxical effects on EU governance. 2022 Strategic Compass defined the Union as a "provider of security" (Council of the European Union 2022), and ongoing war in Ukraine has given further urgency to these ambitions (Fiott 2022). He emboldened advocates of autonomy such as Macron, arguing for European sovereignty, and Borrell, who has reiterated that "Europeans must speak the language of power" (Borrell 2020). Defense budgets in Europe have risen sharply: Germany has confirmed allocations beyond the €100 billion special fund, Poland has surpassed 4% of GDP, and France is pursuing nuclear modernization. Crucially, more of this spending is being framed in EU terms, emphasizing joint procurement and interoperability through PESCO projects and SAFE-supported initiatives.

Thus, Trump's second presidency is transforming the EU – US relationship in real time. What was once a debate about possible scenarios has become an urgent reality. The asymmetry of the past is giving way to a tense renegotiation of roles. For Eastern European states, Trump's posture confirms the need to bind the U.S. closely through bilateral loyalty. For Western European states, it proves that only by consolidating governance at the EU level Europe can avoid marginalization. The result is a paradoxical dual movement: fragmentation at the political level, with Trump privileging bilateralism, and integration at the institutional level, as EU actors push for collective responses.

The first pillar, therefore, is visible in the shift from dependency to negotiation. Trump has made clear that the U.S. will no longer underwrite Europe's security unconditionally. By undermining the automaticity of NATO guarantees, by reducing U.S. contributions, and by privileging bilateral deals, he forced the EU to recognize the fragility of its security architecture, accelerating Union's geopolitical awakening. In a post-American Europe, the transatlantic relationship is no longer defined by asymmetry but by contestation, which may engender a more balanced partnership. Whether the EU succeeds in turning this stress test into a moment of consolidation will depend on its capacity to integrate defense governance and to resist the divisive temptations of bilateral bargains.

3 Pillar II: The europeanization of the German question in defense

The second pillar of this analysis covers the so-called "German question" in defense, a crucial theme for the broader trajectory of European integration which also illustrates how deeply political and contested the process of governance in core state powers still is. Since 1945, the role of Germany in European security has been ambivalent. On the one hand, its economic weight, demographic size, and central geographical position make it indispensable for any continental strategy. On the other, the legacies of the Second World War, constitutional limits, and a deeply ingrained culture of restraint have constrained its military power. This duality produced a "reluctant hegemony" (Bulmer and Paterson 2013): Germany holds the capacity to lead, but its political culture makes it hesitant to exercise leadership, particularly in matters of war and peace

European integration was, from the outset, an attempt to embed German power in collective frameworks. The European Coal and Steel Community institutionalized shared control over the industries of war, while NATO tied the Bundeswehr to American command structures. After reunification, Kohl cleared the "European character" of a united Germany, institutionalized by the Maastricht Treaty through foreign policy coordination and monetary union. Yet the ambivalence never disappeared. The Kosovo intervention forced Germany to participate in combat operations for the first time since 1945, breaking an internal taboo but also highlighting the country's dependence on multilateral legitimacy. The 2011 abstention on the UN Security Council vote on Libya, regarded by European partners and U.S. as an abdication of responsibility, reaffirmed German preference for restraint.

The outbreak of the war in Ukraine in 2022 heralded a break: Scholz's "*Zeitenwende* speech" (2022) announced a national €100 billion special fund for defense and exceed the NATO 2% threshold, suggesting a profound reorientation of German strategy. Its implementation was yet problematic: procurement procedures proved cumbersome, spending plans shifted, and much of the announced modernization remained on paper. By 2025, German defense budgets had indeed grown, but critics questioned whether the *Zeitenwende* was more symbolic than transformative.

Trump's current presidency has complicated this picture further. His insistence that NATO's Article 5 is not "automatic" created new pressure on Germany, which remains a key hinge in the alliance. At the same time, his preference for cultivating bilateral relations with Merz raised concerns among some EU partners that Berlin might again be tempted to prioritize its transatlantic channel over European frameworks. For Paris in particular, this scenario has revived old anxieties.

Yet what is striking today is not the inevitability of Europeanization, but the contingency of Germany's trajectory. On one side, Berlin continues to frame its strategic choices in multilateral terms, using the EU as a legitimizing framework for defense procurement and industrial policy – as proved by the participation in EDF projects and the support for the SAFE program. On the other side, however, Trump's strategy forces Berlin in a difficult position: caught between Washington's pressure to demonstrate loyalty and Europe's demand for autonomy, Germany risks being pulled in opposite directions.

This tension is particularly visible in the debate about Europe's "nuclear umbrella." France and the United Kingdom remain the only European nuclear powers, and while the UK has left the EU, its deterrent remains a central to NATO. Paris, for its part, has offered to open discussions on how the French *force de frappe* could contribute to Europe's collective security. Berlin has cautiously welcomed the idea of dialogue but remains hesitant, fearing both the political implications of closer reliance on France and the risks of alienating Washington. The discussion on the European nuclear shield between France and Germany is still tentative, marked by differences in strategic culture and in political ambition. It illustrates the depth of uncertainty around the future of Europe's defense governance: while some see in French nuclear forces a potential backbone for European autonomy, others view the issue as premature, divisive, or incompatible with NATO (Fayet, Futter and Kühn 2024; Freedman 2025).

What emerges, therefore, is a more nuanced picture than the idea of a straightforward "Europeanization" of the German question. Germany is indeed more engaged in EU defense initiatives than in the past, but its commitments remain cautious, while structural dependence on NATO and U.S. limits Germany's margin of maneuver. Even Scholz's *Zeitenwende* has so far been less a decisive break than a gradual adaptation.

This *politics of ambiguity* is significant for today EU governance. The question is not whether Germany will be "Europeanized" but how its strategic role will be contested, negotiated, and reframed within the Union. Paris insists that Berlin must embed its rearmament in collective frameworks, and the Commission pushes for industrial policies that dilute national predominance. Eastern European states, however, remain ambivalent: they want Germany to invest more in defense but fear any arrangement that could dilute the American guarantee. In this way, the German ques-

tion continues to be the European question: not a problem to be solved once and for all, but a recurring axis around which the politics of integration revolve.

Trump's disruptive presence accelerates this debate, without resolving it. He reminds Europeans of their vulnerability, and tests Berlin's loyalty, but the long-term outcome will be eventually negotiated within Europe. This underscores the endogenous nature of EU politics: integration in defense is not teleological, but a contingent and contested adaptation in which Germany remains central, France plays the nuclear card, and other member states seek reassurance combining NATO and EU guarantees.

4 Pillar III: Towards a political nucleus for eu defense and foreign policy

The gradual emergence of a political nucleus capable of steering defense and foreign policy is the scope of the third pillar of this study. Unlike the other two, it reflects the broader question of whether the Union can generate a center of gravity strong enough to define collective strategic direction. The EU's institutional framework still relies heavily on intergovernmental methods (Scotto 2021), which can yet be interpreted as an opportunity. The history of integration has often advanced through differentiated arrangements, intergovernmental treaties, and pragmatic compromises. International treaties such as the Schengen Agreement or the Fiscal Compact show that progress in sensitive fields often begins with groups of states willing to move ahead, whose agreements are then gradually absorbed into the Union's institutional order.

Defense and foreign policy are seemingly following a similar logic. While the Lisbon Treaty created instruments such as the High Representative, the European External Action Service (2016), and Permanent Structured Cooperation, their effectiveness depends less on treaty texts than on political leadership and coordination among member states. This is increasingly expressed through bilateral and trilateral treaties that can function as catalysts for broader integration. The Franco – German Élysée Treaty (1963) and, later, the Aachen Treaty of 2019 (2019), institutionalized dense cooperation across foreign policy, defense, and cultural exchange (Krotz and Schild 2013). The Quirinale Treaty between France and Italy (2021) created a similar framework for bilateral consultation, while the more recent strengthened cooperation between Italy and Germany reflects a similar willingness. These agreements outline the contours of a possible triangular axis linking France, Germany, and Italy.

It could operate as a political nucleus within the EU, providing an additional political initiative. France brings nuclear capabilities and a long tradition of strategic autonomy; Germany offers economic weight and growing defense investment; Italy contributes a Mediterranean perspective and bridging capacity between North and South. At the same time, the Weimar Triangle (1991), among France, Germany and Poland, has gained renewed importance (Bolouri and Lochse 2025; Delatte, Hermwille and Sniegocki 2024). Poland's role has become pivotal since the war in Ukraine: with its proximity to the conflict, its significant increases in defense spending, and its active diplomacy in NATO and the EU, Warsaw has emerged as decisive in shaping Europe's security debate. Its presence in this trilateral format adds a strong

Eastern European dimension to an otherwise mainly Western European initiative. It also demonstrates that differentiated integration does not have to exclude the eastern flank, which is central to the credibility of European defense.

In this context, Trump's presidency now plays a double role. On the one hand, he exposes the risks of European fragmentation. On the other hand, his pressure incentivizes Europeans to consolidate minilateral cooperation, relying on intergovernmental treaties. This eventually allows progress without requiring treaty reform or unanimity. States most willing to act can do so, and others may join later: Schengen, initially a treaty among five states, became indeed an EU policy. Similarly, the Fiscal Compact was negotiated outside the EU framework but then integrated into budgetary governance.

The question is then not whether the EU can leap directly to a federal defense union, but whether a core group of states can generate sufficient political will to shape collective responses. The Franco – German partnership has historically been central in this regard, but today it is increasingly complemented by Italy and by Poland. If these frameworks are activated and coordinated, they could serve as the nucleus of a more coherent European approach to defense and foreign policy.

Of course, such developments will not eliminate differences. Eastern European states, particularly Poland itself despite its activism, insists on maintaining a strong NATO link and the primacy of the American guarantee, hindering progress toward autonomy. Yet, since the outbreak of the war in Ukraine, Poland has emerged as a pivotal partner within the European Union. With an economy growing more dynamically than the EU average and a comparatively younger population, Poland occupies a central position on the Union's eastern front toward Russia. Berlin, in particular, has recognized Warsaw's strategic relevance, especially within the framework of the Weimar Triangle—the only trilateral cooperation mechanism explicitly mentioned in recent German coalition agreements. Originally conceived in the early 1990s as a forum for economic dialogue, the Weimar Triangle has since evolved far beyond its initial commercial aims, becoming a key platform for strategic coordination within the EU.

In this context, intergovernmental method provides flexibility: coalitions of willing states can act without compelling others, thereby avoiding paralysis while preserving inclusivity. This *differentiated integration* reflects the political reality of the EU: unity where possible, flexibility where necessary. Trump's presidency does not abolish these tensions, but it makes them more urgent by highlighting the costs of inaction.

The third pillar, therefore, does not imply a call for federalization but recognizes how Europe's politics of defense and foreign policy is likely to advance through informal coalitions, bilateral treaties, and minilateral groupings, gradually acquiring broader significance. Intergovernmentalism is not the opposite of integration but one of its methods. The challenge for the EU is to ensure that these nuclei remain embedded in collective frameworks rather than becoming exclusive clubs. If successful, the triangular cooperation among France, Germany, and Italy, reinforced by the renewed importance of Poland, could provide the initiative needed to consolidate governance in strategic fields, leaving the door open for broader participation in the future.

5 Conclusion

This paper has examined how Trump's presidency interacts with three core pillars of EU governance. The first concerns the transatlantic relationship in defense and security: long characterized by asymmetry, it is now pressured to evolve toward a more balanced partnership. Trump has exposed the fragility of NATO guarantees, but also compelled Europeans to accelerate initiatives such as PESCO, EDF, and SAFE. The second pillar is the German question in defense, an issue that remains central to Europe's politics of power. Germany's rearmament after the *Zeitenwende* is unavoidable, but its legitimacy depends on being embedded in collective frameworks. Trump's bilateral diplomacy complicates this balance, while the debate between Paris and Berlin over the nuclear umbrella highlights the enduring ambiguity of Europe's security arrangements. The third pillar is the gradual formation of a political nucleus in EU foreign and security policy, which stems from intergovernmental treaties among four key actors: France, Germany and Italy and Poland. This differentiated cooperation can generate momentum where unanimity among 27 would falter.

Ultimately, Trump's impact on EU governance affects the organization of its core state powers. EU now should rethink itself in *post-American terms*, which does not imply rupture with the U.S., but rather a rebalancing of the transatlantic relationship. As Guicciardini, 16th century Italian historian and statesman, reminded us in his reflections on the "balance of power" (1984), stability arises when no actor dominates unchecked, and when power is distributed in ways that compel prudence and cooperation. A post-American Europe, therefore, would assume greater responsibility in shaping its own destiny within a plural international order. This new role also implies a reinterpretation of Europe's relations with other global and regional actors – even outside the transatlantic prism, broadening the Union's capacity to act in a more autonomous and multipolar context.

Yet the conclusion must remain open. Firstly, the question of whether the European Union can still act as a genuine normative power plays a crucial role in terms of EU global projection. Traditionally, the EU's influence has relied on its regulatory power—its capacity to shape global behavior through norms and regulations rather than coercion. As Anu Bradford's Brussels Effect (2020) shows, the Union's regulatory reach in fields such as trade, data protection and environmental policy has projected power without force. Yet the erosion of multilateralism under Trumpism has destabilized this model. The answer will only become clearer once it is known how global multilateralism—particularly in the commercial and trade framework—will be renegotiated.

Secondly, European integration has never been linear nor teleological: it has advanced by crises, improvisations, and incremental steps, often through arrangements outside the formal treaties, later absorbed into the Union. The strength of integration lies in its ability to reinvent itself in response to changing circumstances. Today, these are defined by the end of unipolarity and the emergence of a more multipolar and inclusive international order. Whether the EU can transform this moment into a more balanced and effective governance remains uncertain. But challenges are

part of Europe's historical tradition: to adjust, to compromise, and to seek equilibrium in a shifting world.

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Use of AI tools During the preparation of this article the author used ChatGPT, a large language model (LLM), to support drafting and language refinement. After using this tool, the author reviewed and edited the content as necessary and takes full responsibility for the publication's content.

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