



## Europe and the US election: Hope for the best, prepare for the worst

by Ian Bond, 22 January 2024

**There is a good chance that Donald Trump will return to the US presidency in 2025. That would endanger European interests, but Europe is not investing in mitigating the risks.**

In less than a year, the next US president will be inaugurated. Donald Trump, who has just thumped his Republican rivals in the Iowa caucuses, seems almost certain to be the Republican candidate. The majority of recent opinion [polls](#) show him leading Joe Biden, or the two candidates level. Most European leaders hope that Biden will be re-elected, but as military leaders, politicians and business gurus have said for decades, “Hope is not a strategy”. In 2016, most Europeans did not take Trump’s prospects of winning seriously enough. In 2024, they have no excuse for repeating their error.

To be fair to EU leaders, Trump himself did not [expect](#) to win in 2016. It took him time to assemble a team. He did not come into office with a coherent programme, but with a set of instincts. Over the intervening years, his instincts have if anything become [more violent and undemocratic](#), but as Charles Grant and I heard in Washington at the end of last year, there are now people in influential think-tanks and elsewhere working to ensure that Trump’s ideas can be turned into implementable policies. This time, Europe might not be able to rely on Trump’s chaotic approach to governance, which meant that in his first term many policy announcements never led to action. Sometimes, his ideas got nowhere because they were blocked by the so-called grown-ups in the room – people from outside Trump’s circle, like Secretary of State Rex Tillerson and Defence Secretary James Mattis. Trump is unlikely to appoint such independent figures this time.

Biden has been far from perfect, from a European point of view. He has been slower than many would have liked to provide military support for Ukraine. He is no fan of free trade. He only belatedly considered the interests of America’s allies in offering subsidies to industries involved in combating climate change, such as those manufacturing batteries for electric vehicles, to encourage them to invest in the US – which many EU leaders fear will come at the expense of investment in Europe. But in general, Biden represents democracy at home and a belief that America must remain fully engaged in the world, including on issues such as climate change where US action or inaction can have a

disproportionate impact on what happens in the rest of the world; Trump represents authoritarianism at home, coupled with extreme unilateralism in the conduct of foreign policy. Some of his most vocal supporters in Congress espouse isolationism of a kind that had been marginalised in the US political establishment since World War II.

For Europeans, there should be at least four areas of particular concern if Trump wins a second term: defence and the future of NATO; transatlantic economic relations; Trump's approach to the rules-based international order; and US internal strains and their international impact.

## Defence

In the light of the continuing Russian threat to parts of Europe, this is the most urgent priority. Most European leaders are still not being honest with their populations about the strategic situation in which Europe finds itself. Russia is increasingly putting its economy on a [war footing](#). Though it has suffered enormous casualties in Ukraine, that does not seem to have provoked the kind of popular opposition to the war that might have been expected; and Putin's appetite for regaining control of parts of the Russian/Soviet empire does not seem to have been dulled. While Russia might need a pause to rebuild its forces, many of the countries most threatened by Russian expansionism, such as the Baltic states, have also transferred much of their military equipment to Ukraine, in the hope that Putin would be stopped there. If he is not, they will be even more exposed, unless their allies reinforce them.

European industry and defence commissioner Thierry Breton recently [revealed](#) that in 2020 Trump told European Commission President Ursula von der Leyen that the US would never defend Europe, that the US would leave NATO and that Germany owed him \$400 billion for its defence. Though the US Congress [passed](#) legislation at the end of 2023 that would oblige a president to get Senate approval before withdrawing from NATO, that would hardly matter if Trump announced that he would not defend an ally at risk of attack. The principle of collective defence in the NATO treaty is based on confidence, not obligation: it only commits an ally to assist another ally under attack by taking "such action as it deems necessary, including the use of armed force". Trump could declare that he did not deem it necessary to do anything. Europe might also find itself exposed if Trump embroiled the US in conflict with Iran or (less likely, but not impossible) with China over Taiwan, and pulled forces out of Europe to bolster forces elsewhere.

In Trump's first term, Europeans broadly took two approaches to the risk of US withdrawal from NATO. One was to flatter Trump. This was pursued by Poland's government, which offered to host a '[Fort Trump](#)' military base if Trump stationed more US troops in Poland. NATO Secretary General Jens Stoltenberg, sometimes dubbed 'the [Trump whisperer](#)', became adept at telling Trump how much more the allies were spending on defence as a result of his pressure on them. The second approach was to resist Trump. German Chancellor Angela Merkel tended to do so [passively](#), ignoring his criticism of Germany's inadequate defence budget and excessive dependency on Russian gas. French President Emmanuel Macron tended to hedge more actively against the risk of Trump carrying out his threats to abandon NATO, [arguing](#) that Europe needed to regain its "military sovereignty" because the US was turning its back on Europe.

The big difference in Europe's situation between Trump's first term and now is Putin's war of aggression against Ukraine. Ignoring Trump and doing nothing would be a more dangerous option now. If some Europeans want to cosy up to Trump in the hope of changing his mind on defending Europe, there is no harm in that; but the most important thing is to [increase investment in defence](#) – from research, development and innovation to faster production of basic supplies like ammunition to fielding larger forces.

These things will all take time to implement, but the sooner Europeans start to do them, the sooner they will be able to fill – in part, at least – the gaps that might be left if Trump reduced the US commitment to the defence of Europe. Much of the effort may need to be managed through the EU: it has the tools to incentivise its members to develop and procure defence equipment jointly. But member-states will also need to find ways to work with non-EU countries including the UK, which is still a significant military player in Europe, with a large defence industrial sector.

European countries are already wondering how to deal with the potential suspension of US support to Ukraine. If Trump returns to power, the end of US military assistance to Kyiv would be a near certainty. But NATO and EU members that take defence seriously should be war-gaming not only how to save Ukraine, but how to respond to an attack on an EU or NATO member in the event that the US decided to remain aloof. They should consider whether the remaining allies could ‘take over’ NATO if the US pulled out. They should also raise the sensitive question of whether current French and UK nuclear forces would be enough on their own to deter an attack on Europe, if the US nuclear umbrella were no longer there; and if not, what would be necessary to re-establish effective deterrence. If the US remained part of the alliance but scaled back its involvement, the EU and NATO should discuss whether the ‘Berlin plus’ arrangements of 2002 could be revised with a view to coping with the possibility of combat operations in Europe: they were only designed to allow the EU to use some NATO assets in peacekeeping and crisis management operations outside the NATO area.

## Trade

Trump has a long record of hostility to free trade. Though China was his number one target during his first term, he was almost as hostile to the EU – [claiming](#) that it treated the US worse than it treated China. When he imposed tariffs on aluminium and steel imports on the spurious basis that they threatened US national security, the tariffs applied to European as well as Chinese producers. There is a high risk that in a second term Trump would use the ‘national security’ excuse to impose tariffs on more goods, regardless of EU opposition or the risk of WTO disputes. Indeed, the current US Trade Representative, Katherine Tai, rejected the views of a recent WTO panel finding that Washington’s use of the national security exception is unlawful. If the Biden administration is happy to act in this way, it is almost certain that Trump will do the same. As things stand, the EU and US have not reached a definitive agreement on removing steel and aluminium tariffs and cancelling the EU’s retaliatory measures, so the default position for the next administration would be the reimposition of tariffs that are currently suspended.

The European Commission’s usual response in such cases would be retaliatory tariffs, generally targeted at politically sensitive industries or regions in the expectation that the relevant governors and members of Congress will then lobby the White House to reverse course. The risk with Trump is that he might escalate instead. A full-scale trade war would be more damaging to the EU than the US, since trade makes up a larger share of Europe’s GDP, but economies on both sides of the Atlantic would be hit. EU member-states that are particularly reliant on a US security guarantee might also fear that Trump’s response to EU trade defence measures might be to abandon vulnerable countries. But apart from increasing its own tariffs, the EU would have few options: if the US market became more difficult to sell into, it would be hard to replace. The European Commission might not be able to do much more than use the tactic employed, successfully, by Jean-Claude Juncker as Commission president in 2018, when he promised that Europe would buy more soybeans and other goods from the US, even though he had no power to ensure that this happened. Trump was apparently satisfied that he had achieved a victory.



## The rules-based international order

Trade is not the only example of Trump's low regard for the international rules to which the EU applies so much importance. The multilateral system is already creaking, thanks to Russia's flagrant violation of the UN Charter in invading Ukraine, and Israel's rejection of international norms on the treatment of territory and people under occupation (which long predates its refusal to listen to UN calls for restraint in its current attacks on Gaza). Trump might break it entirely.

In his first term, Trump withdrew the US from UNESCO, the World Health Organisation (WHO), the UN Human Rights Council (HRC), the Paris climate agreement and a wide range of international security agreements. He also suspended US funding for some UN activities, in particular the UN Relief and Works Agency for Palestinian refugees. He threatened to withdraw from the WTO, but had not done so by the time he left office. Biden was able to reverse a few of these steps (such as rejoining the HRC, WHO and UNESCO), but Trump's actions weakened the multilateral system: if the US no longer even paid lip-service to international norms and the bodies that try to enforce them, why should other countries behave differently? Trump's hostility to international efforts to reach net zero emissions and avoid catastrophic global warming would be particularly damaging.

In 2017, there was some hope that China might join the EU in defending the global order against Trump: Chinese leader Xi Jinping told his audience at the World Economic Forum in Davos that "We should adhere to multilateralism... We should honour promises and abide by rules". Chinese behaviour turned out to be rather different from Xi's rhetoric. If European countries (including the UK) want to defend the rules-based international order in a second Trump term, they need to build links not only to other liberal democracies like Japan and Australia, but to countries that may share fewer of the EU's values but attach importance to the survival of the UN system and other parts of the international architecture, such as India and South Africa.

## US internal divisions

The biggest threat, and the one that Europeans will struggle to mitigate, is that – with or without a Trump victory – there will be a long-term reshaping of the US domestic polity and its relationship to the world. Were Trump to win election with a minority of the popular vote, as in 2016, a significant part of the electorate would regard his victory as illegitimate (though they might grudgingly accept it, as in 2016); but if he loses, he is likely to claim that he has been defeated by electoral fraud and encourage his supporters to respond with violence (implicitly and even explicitly). An ever-more divided America is likely to turn inward, unable to take a strategic view of its international role or even to take the domestic action needed to respond to global challenges such as climate change. The traditional internationalist Republican Party still exists to some extent in the US Senate. In the House, however, isolationist, pro-Trump Republicans, though in a minority, [reflect the views](#) of most Republican voters, and already call the shots – for example, blocking further US aid to Ukraine. Even House Republicans who are not outright isolationists are not looking at the US's global interests, still less the interests of US allies. They see funding for Ukraine and other US partners only in terms of victories and defeats in the domestic political battle: if the Democrats are for it, the Republicans must oppose it. Were Trump in the White House, he would undoubtedly encourage this zero-sum, destructive approach. Even if Biden returns as president, there is a significant chance that the Republicans will control at least one chamber of Congress, enabling them to block Biden's legislative programme, including any foreign aid, military or economic.

European leaders cannot take a partisan position in the US election campaign – they have to work with the winner, even if that is Trump. Nor can they heal the growing rift between Democrats and

Republicans – indeed, similar polarisation exists in some European countries. But Europeans can maximise their public diplomacy effort across the US so that American voters understand what NATO and the EU are, how they contribute to US as well as European security, and how much Europeans are doing to support Ukraine – correcting any impression that they are free-riding.

In November 2023, the editor-at-large of *The Washington Post*, Robert Kagan, [wrote](#) “A Trump dictatorship is increasingly inevitable. We should stop pretending”. That may be too pessimistic – there is still time for Biden to turn the polls round, or the US courts to [disqualify Trump](#) – but European governments need to plan on the basis that Trump is more likely than not to win. If he does not – so much the better. But even if Trump loses this time, the scale and nature of his electoral support in 2016 and 2020 show that a significant part of American society has turned away from democratic values and international engagement in favour of populism, protectionism and isolationism. Europe should have started hedging against a less friendly America in 2016, as soon as the election results were in. It should not waste any more time.

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