



Institute for European
Analysis and Policy

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Overcoming the pessimism

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Policy Brief 16/2024

November 14, 2024

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It could have happened; it happened. Many Europeans reacted with passion, some with joy, more often with disappointment or anxiety. The passion of the reactions is largely justified. It is indisputable that the events of American democracy also concern us. In fact, there is no lack of connections: from the reaction to mass immigration, to the social and geographical fractures created by the transformations underway, to the overlapping of identity issues with traditional social problems; this has led on both sides of the Atlantic to an erosion of consensus for the pillars of liberal democracy and the growth of populist and nationalist movements of which Trump is an emblematic expression. On these aspects Francis Fukuyama wrote an illuminating analysis for the Financial Times. Therefore, it is not surprising that Trump's victory is instinctively welcomed with favor by the European populist right and with dismay by the traditional democratic forces, especially from the left. Moreover, in Europe, especially in Italy and Germany, we are witnessing the growth of populist movements that are culturally on the left, but that have many things in common with those that are at the opposite extreme. What has happened will require an in-depth analysis by American and European democrats that is just beginning. Moreover, it is good not to lose sight of the fact that Trump won by gathering a heterogeneous coalition, united more by a sum of rejections than by the adherence to a coherent vision of the world. Elections often end with the defeat of the loser, rather than with the success of the winner.

What has happened is certainly a new phenomenon of great importance. However, it would be good if philosophers, sociologists and political scientists on both sides of the Atlantic did not rush too much to rationalize and conceptualize the phenomenon. For example, it is very risky to force obvious analogies, sticking old labels such as “fascism” to phenomena that are an exclusive expression of today's world. It is also premature to try to rationalize very different behaviors in the world of technology and finance; alongside Elon Musk, noisily aligned with Trump, there is the financing from corporate America from which Kamala Harris has largely benefited. Before defining the dynamics of ideas, it would be good to study that of reality. Beyond emotional reactions and academic analyses, an indisputable fact emerges

that is expressed by the now almost ritual metaphor of Tolstoy's unhappy families: internationalist liberals are all alike, but nationalists are nationalists each in their own way. De Gaulle, who knew something about nationalism and sovereignism, defined states as "cold and lucid monsters", moved mainly by national interest. The joy expressed by Orbán and other populists like him for Trump's victory is due less to ideological affinities than to the hope that Trump's presence will help them strengthen their power at home. These alleged affinities will therefore also have to be assessed by the test of national interest: a factor that beyond the rhetoric tends to change less than the color of governments. The reactions, all in all contained, by Giorgia Meloni and the French RN are proof of this. If liberalism is in a crisis, as Fukuyama says, populism will not be able to easily navigate its many contradictions.

A useful starting point is also the opinion of the West's declared adversaries, for example China, Russia, Iran and North Korea. However different their priorities and interests, their strategy is based on the common belief in the unstoppable decline of the West. In their analysis, this is expressed in a crisis of values, but above all in the growing difficulty that the ruling classes encounter in forming the consensus that is necessary in a democracy to govern coherently. Perhaps unconsciously, these autocrats take for granted the "paradox of democracy" theorized by Plato, according to which the corruption of the popular will inevitably tends to hand power to a tyrant. They therefore think that the West no longer has the strength to impose its vision of the international order and that the end has come to its hegemony. They have no reason to particularly sympathize with Trump, but they see in his aversion to liberal values and to the alliances that America has built over the last century, as well as in the persistent fractures of American society, evidence of decline but above all a manifestation of weakness. We Europeans must also be clear that the main target of their strategy is America. They have only ill-concealed contempt for Europe and its institutions; the proof, if proof were needed, of a terminal decline. In their strategy, Europe, inevitably incapable of uniting, is interesting only insofar as the loosening of Transatlantic ties can contribute to weaken America. They have reasons to think that Trump is going in the direction they want. None of this should surprise us. It is a physiological fact that the functioning of open societies easily exposes weaknesses. It is a factor that autocrats cannot by definition understand and it is also the trap into which they systematically risk falling. This is exactly what happened in the 1930s. Back then, the trap was deadly for them, but a very high price was paid by everyone. But let us avoid pushing the analogy too far. On the one hand, no complacency is allowed today, on the other, the circumstances are too different. The other important point of the common strategy of our adversaries is the belief that they can profitably exploit post-colonial resentments

towards Europe and resentment for America's real or perceived mistakes, to gather the consensus of many emerging countries; for example, the resentment recently fueled by the events of the Gaza war, cleverly presented as a "colonial" war.

This brings us to analyze the dimension of Trump's victory that is most important for us: its impact on the interests of the EU and its members. In recent months, a good part of the political, diplomatic, economic and academic establishment that deals with foreign policy in Europe has devoted a considerable amount of energy to discuss the consequences of the inevitable change in Transatlantic relations and, within it, of a possible return of Trump. It is not yet a political strategy, but it is the indispensable premise for one.

One point on which many agree is that we must organize ourselves to deal with a different America from the one we have lived with for the last 80 years, in essence with "less America". This is, after all, the meaning of the concept of "strategic autonomy". However, we must guard against a possible drift, which emerges especially in the French debate but not only, of interpreting "less America" in the sense of "no America", or at least of a residual America. The ties that have always existed have assumed such intensity in the last century as to create a tangle of interests that are impossible to dismantle easily. Interests that are economic and commercial but also strategic and military, of an intensity never seen before in history. Ties that also involve a community of values that can be contested if we look at the numerous differences, but that appear clearly if we compare ourselves to the rest of the world. We also know that this tangle and the relationships that result from it are asymmetrical. If the meaning of strategic autonomy is to reduce this asymmetry, we cannot, however, ignore the fact that the bond is perceived as more indispensable in Europe than in America. Here comes the fundamental difference between the consequence of Trump's victory and the one that could have been had Kamala Harris won, as many in Europe had hoped. In this second case, we would at least have had the help of a continuity of relationships.

With Trump, however, we are in largely unknown territory, also because we know that the experience of the first term can help us only to a small extent. One danger we run is that every European will invent his or her own imaginary Trump, threatening or benevolent, that best suits them in light of their national priorities. If instead we ask ourselves about the "real Trump," there are two fairly certain elements. His vision of human relationships, personal as well as political and international, is essentially transactional:

if I win, you must lose. The concept applies equally to adversaries and allies. It is difficult to say to what extent this is chauvinistic affectation, but Trump seems more inclined to show benevolence towards autocrats than towards democracies. The second element of his personality is that he brandishes a natural unpredictability as a characteristic feature of his international action. Deterrence theorists discuss whether and to what extent unpredictability as a method of behavior strengthens its effectiveness against adversaries. There is no doubt that relations between allies can only be productive if they are predictable. Article 5 of the NATO treaty, which establishes the obligation to intervene in defense of an attacked member, is obviously addressed to adversaries but it only makes sense if there is mutual trust between the allies that it will be applied in case of need. There is no trust without predictability. In recent times this trust has weakened. Many Europeans do not know how to interpret the growing importance of China and the Indo-Pacific in American politics; others are more inclined than in the past to attribute to the US the responsibility for what does not work in the international system. Many Americans look to Europe as an ally who is sometimes unruly, but taken for granted; others are intolerant of behaviors that they interpret as parasitic. The quality of Transatlantic dialogue has deteriorated and with it mutual trust. Poor management of relations under Trump could make the gap unbridgeable.

Like all populist programs, Trump's is not only unpredictable; it also contains elements that are partly impracticable (deporting millions of illegal immigrants), partly mutually incompatible (fighting inflation by raising customs barriers and massively reducing taxes without corresponding savings in spending in the presence of an ever-growing public debt). On the geopolitical level, the idea that it is possible for America to withdraw from existing conflicts and at the same time exercise hegemony simply by possessing a preponderant force is as illusory as the security of the Wagnerian Fafner who sleeps motionless in front of the cave to protect his treasure. If politics did not serve primarily to reconcile antinomies, an algorithm would suffice, but those in Trump's electoral platform are truly too many. We also know, as Mario Cuomo, long-time Governor of New York, effectively said, that "we campaign in verse but we govern in prose." Some contradictions will therefore be clarified, but they will not prevent part of the program from being implemented, perhaps even paying the price of serious initial errors. However, we do not know which elements of the contradiction will be privileged. Much will depend on the people Trump chooses to govern America. We know that this time absolute loyalty will be a decisive requirement. However, some of his nominees embody incompatible visions of Trumpism. It is premature to make predictions today about the meaning of the new administration, even if the first

announcements seem to be moving in the direction of strong radicalism. Under these conditions, it would be illusory and even counterproductive to ask Europeans to define an overall policy now and in detail. It is possible, however, even in the absence of clear indications of American intentions, to prepare tools with the necessary flexibility to address various possible scenarios. On the one hand, it is a question of defining our priorities, on the other, of working to ensure that Trump perceives the cost of “non-Europe”, as we perceive that of “non-America”. In other words, the difficult objective is to save the alliance, not to accept its dissolution; but not at the cost of sacrificing our interests. One problem will be the urgency of the issues to be addressed. The archaic rules defined more than two centuries ago that govern the institutional transition in America mean that the new Trump administration will not be fully operational and therefore we will not know the “real Trump” until the end of January and perhaps beyond. In Europe, France is partly paralyzed. Germany is preparing for a political transition and the new government will not be formed before February and perhaps beyond. The new Commission will not be fully operational before the end of the year.

The economic challenge

Among the many contradictions of Trump's electoral platform, the economy occupies a prominent place. Reconciling the interests of some billionaires who promote a liberalism bordering on anarchy in which oil and Tesla thrive together, with those of the victims of the deindustrialization of the rust belt and of a middle class that feels marginalized, is possible only by deciding that the the cost will be paid by the rest of the world. But this too is a purely rhetorical exercise because the rest of the world will not accept to suffer without reaction, but also because of the effects on inflation: one of the big issues that brought him back to the White House. Not that Kamala Harris's economic platform inherited by Biden, who had also maintained many of Trump's protectionist measures, was any less contradictory. We know, however, that the desire to promote a massive increase in customs duties has always been a constant in Trump's thinking; the return of Robert Lighthizer as head of international trade confirms that this will certainly be a challenge for the rest of the world. It will particularly concern China, Mexico and Europe - those who benefit from the largest trade surplus. We know that it will happen, but the nature of what Trump will decide to do is not yet clear. The most plausible hypothesis will be a far-reaching *fait accompli*, but one designed to force the recipients to negotiate. A similar tactic adopted in the first term towards China and practically continued by Biden has not yielded the desired results: today the American deficit towards China is much higher than it was then.

There is a temptation among some analysts to give an almost ideological explanation of the economic conflict that risks pitting us against Trump. For Europe, it is said, being a partisan of a multilateral international order based on shared rules is an existential question. Trump instead wants to destroy them and accelerate the crisis of globalization. The reality is more complex. The multilateral order has already been in crisis for a long time, practically since the failure of the Doha Round and the perception of the negative effects of China's entry into the WTO. The EU itself, while continuing to demonstrate its unconditional support for the WTO, has in fact developed mainly bilateral or regional trade agreements. Globalization as it developed at the turn of the century is certainly in crisis due to the changed geopolitical situation and the effects of the pandemic. However, talking about de-globalization is at the very least risky. The data on international trade demonstrate this. Instead, an adjustment is clearly underway in the manner the world economy, destined however to remain largely globalized, functions. We are witnessing a resumption of political control over market logic, but it is more a swing of the pendulum than a change of model. Europeans are right in thinking that the goal must be new rules, but for the moment we must necessarily navigate uncertain waters. After all, we are right in criticizing growing American protectionism, but we must also admit that Europe is not completely exempt from it either.

We Europeans have already experienced moments of trade tensions with the US during Trump's first term, but also before. The EU currently has the second largest trade surplus with the US, after China and similar to that of Mexico. We can therefore expect an aggressive stance. The main risk for Europe is the division that could be created if every government rushed to Washington trying to negotiate bilateral agreements; this is probably what Trump hopes to provoke. This has also happened in the past. It would clearly be a mistake because every European country would be negotiating in a state of weakness. This is especially true for those with the largest surpluses, such as Germany and Italy. Furthermore, even if the European surplus is very unevenly distributed among the member countries, the integration of the economies in the EU is such that the damage would be widely distributed. A measure that hit German cars hard would have repercussions far beyond Germany. Italy, for example, would be hard hit even if it had managed to save Prosecco bilaterally. A joint response would therefore be much more effective. The goal will be to negotiate; no one has an interest in a trade war. However, with Trump this will only be possible if the EU has prepared credible and effective retaliatory measures. The European Commission is generally efficient in this kind of situation. We will also have to worry, as

during the first mandate, about possible distortions caused by a trade conflict between the US and China. Finally, the foreseeable trade frictions that we will encounter with Trump's America should not prevent, but could even stimulate, the conclusion of trade agreements with various important areas of the international economy, such as Mercosur or Asia. In many cases, these are also countries that could have problems with America not unlike ours.

The second area where tensions are foreseeable is Trump's probable abandonment of international agreements on climate, as he did during his first term. This will pose significant problems for the EU. Continuing to exercise the EU's role as a global leader in this area will become much more complicated. For example, it will make it more difficult to exercise what some call "ecological imperialism" in the EU's trade relations with emerging countries. Regardless of that aspect, this will occur at a delicate stage for the European strategy. The EU's Green Deal is already being criticized and everyone agrees that it must be adapted to the new circumstances of the international economy. However, we do not know what the real content of the American change will be. We must expect a revival of hydrocarbon production, which has never stopped under Biden, as well as a push to loosen the rules and reduce subsidies for green technologies; but it is too early to assess the extent of this. More or less drastic measures would have different effects on us. A radical change in American policy would make the search for a new balance in Europe more difficult and could also give rise to a strong climate-skeptic movement that has so far remained a minority.

For many years, since the Obama presidency, the main issue that has affected Transatlantic economic relations has not been trade issues, but the growing role of regulations in relations between already highly integrated economies. This is a sector in which Europe is strong and rightly proud of its complex regulatory system. The American one is significantly different, in its philosophy and also in the way it works; this includes the important issue of the management of competition rules. Various initiatives, more or less ambitious, have been launched to make regulatory systems more convergent, or at least more compatible. The latest is the Trade and Technology Council launched during the Biden presidency. The results have so far been modest, but the existence of channels of dialogue is still very useful. Another reason for the importance of these issues goes beyond their economic importance. Many of the regulations that govern our economies do not only include interests, but are also an expression of values. Just think of intellectual property, issues that affect freedom of expression and pluralism, or artificial intelligence. Today, the West is no longer the exclusive master of these types of

rules. Other actors, first and foremost China, who operate on the basis of values very different from ours, have a legitimate claim to sit around the table. A growing divergence between Europe and America would significantly weaken the position of both. This is particularly important for Europe because, unlike in the past, the evolution of the economy today brings to the forefront of regulatory problems technologies that Europe does not possess and on which it is behind. The international projection of European rules, the so-called Brussels effect, is significantly weakened.

Furthermore, Europe, like the US, is launching out into industrial policy operations in which the issue of regulations is connected with trade policies, taxation and financial issues. The frictions that arose following the Biden administration's launch of the vast program known as the Industrial Reduction Act are a good illustration of this. This problem is at the heart of the analysis of the reports recently presented by Enrico Letta and Mario Draghi, which will probably form the basis of the strategy developed by the next European Commission. They, and Draghi's in particular, are largely focused on the innovation and productivity gap that exists between the two sides of the Atlantic; there is no need to dwell on them here. Suffice it to note, however, that a greater or lesser divergence with American policy will have a certain effect on the future of the European strategy. On the one hand, it is foreseeable that the divergence will increase, while the propensity for dialogue will decrease. On the other hand, Trump's emphasis on deregulation will constitute an incentive to follow Draghi's indication to review the EU's regulatory policy in the direction of less intrusive and less risk-averse rules.

Geopolitical challenges

The main issue in Transatlantic relations with Trump will certainly be the future of our alliance and in particular of NATO. Ending all wars in which the United States is directly or indirectly involved is one of the most important points of his electoral platform. This might suggest a return to the isolationism of the Republican Party between the two world wars. However, it makes no sense to compare the isolationist impulses of a still "virtual" power with the understandable desire to reduce its exposure as the great superpower that is still hegemonic in many respects today. It is a great power that knows that it could not shrug off its responsibilities even if it wanted to. The other characteristic is Trump's clear hostility to any form of multilateral organization, including the EU, and his declared exclusive interest in bilateral relations. From a certain point of view, his vision of international relations recalls the famous phrase of Lord Palmerston at the height of British imperial power: "England has neither permanent

friends nor enemies, but only interests.” From this point of view, Trump is a man of the past who seems to ignore how much the network of structured and innovative alliances and the promotion of various multilateral institutions that the US developed after WWII, contributed to strengthening its hegemony. In his rhetoric, the world is made up of dangerous but respectable adversaries and parasitic allies who take advantage of American protection at a low cost. It will be said that this is rhetoric and it is reasonable to think that the reality will be different. However, it would be very dangerous to take as a reference his first mandate, when his ambitions were systematically frustrated by collaborators faithful to the traditional vision.

Under these conditions, the scenario of a withdrawal from NATO or even just from its main commitments, seems unlikely. Instead, it is more than likely that Europeans need to participate in common defense with a commitment commensurate with their capabilities. This is, after all, happening. Most NATO members have already reached or exceeded the common goal of dedicating at least 2% of GDP to defense spending and many are already setting higher goals. Convincing laggards like Italy and Spain is no longer just an American need. We also know that the problem of making the European contribution to common defense more credible goes beyond the question of the level of spending. It involves the problem of the fragmentation of European efforts, operational coordination, rationalization of purchases, a common risk assessment and intelligence sharing. It is essentially a question of organizing the European effort in a way that makes it credible, but without taking away credibility from NATO.

On this sense, significant difficulties emerge that we would have had to face with any American government, but Trump's presence makes them even greater. First, there are the well-known obstacles on the road to a more integrated European defense. Regarding these obstacles we now have the contribution of the aforementioned reports by Enrico Letta and Mario Draghi, but also the more recent one by Saulo Niinistö, former President of Finland. But the difficulties are not only European. It is the eternal dilemma of the alliance. The Americans are calling for greater European involvement, but they are wary of it as soon as they suspect it will lead to a reduction in their influence. The Europeans resent American overpowering, but they panic at the first sign of disengagement. There is an inevitable industrial problem. If the Europeans must engage more in the military field, it is logical and inevitable that they seek to strengthen their industry. This will lead to friction with the interests of American industry. Then there is the inevitable reorganization of some command structures that will have to take

into account the greater European effort. Trump cannot tell us that we must assume primary responsibility for our defense, but that we must do so... under American command. The issue can present itself in many forms. In fact, provided that adequate resources are made available, European or predominantly European operations in important but secondary theaters such as Africa are conceivable. However, this is currently and for the foreseeable future not very credible in the main theater, that of the Russian threat in Europe. Here the credibility of our deterrence cannot but depend on NATO. All these are issues that are already difficult to discuss with a Democratic administration, but even more so with Trump.

This brings us to the real test we will have to face, presumably soon: Ukraine. If Trump feels bound by his campaign promises to “quickly end the ongoing wars,” it is plausible that he will start with Ukraine. It is less plausible that, by abandoning Zelensky to his fate, he will repeat the mistake of the failed agreement with the Taliban in Afghanistan, for which Biden paid the consequences. Among the many reasons, there is the obvious analogy with the Taiwan issue and the consequences for America’s credibility in Asia. It is useless to speculate today on the possible contents of an American initiative, which in any case seems to be underway. The contours of the issue are known. First, the main obstacle to the negotiation is not currently in Kyiv, Washington, or any European capital. It is in Moscow, where Putin is convinced that time is on his side. The Russian President is now completely prisoner of the myth of the recovery of Russian power and therefore of an irreconcilable conflict with Europe and the West. Ukraine is an essential element of this myth. It is likely that Trump is aware that the solution must constitute a sign of strength and not of weakness in the eyes of the world. In these conditions it is clear to everyone that it cannot be about peace and even less about any “new European architecture”, but only about a truce. After all, only in this way can the Ukrainians be convinced to accept a cessation of hostilities that would consecrate the loss of control over a significant part of their territory; perhaps temporarily, as was the case with Germany. But it will still be a deprivation. From this perspective, the main issues will be the guarantees of sovereignty given to Ukraine and the deterrence that will be maintained against Russia, including the maintenance of sanctions.

On these issues, Trump’s position will presumably be that guarantees to Ukraine must primarily be a European affair. Rhetorically, the statement seems convincing, at least to the American public but not only. It is a fact that, after the fate of the 1994 Budapest Protocol, guarantees that give Russia any role whatsoever cannot be considered. They must be Western. It is likely that Europeans will have to bear

the brunt of the burden. This also concerns the reconstruction of Ukraine, but it is inconceivable that the US should not be part of it in some way. Whether this happens in NATO, on its margins, or in a separate but equally credible context, is a matter for debate. If it is correct to expect that Europe must have a preponderant role in the reconstruction and future defense of Ukraine, this necessarily also entails a major role for Europeans in defining the objectives and conducting the negotiations. For too long, American leaders and many European leaders have refused to see clearly the true nature and objectives of Putin's strategy; the greatest risk at this stage may be that Trump, in his search for quick success, will make the same mistake. It must be clear to everyone, however, that a solution that represents a victory for Putin imposed not only on Ukraine but also on Europeans would have a devastating long-lasting effect not only on Transatlantic relations, but also on the future of European integration. Not only would it also compromise the future of Moldova and Georgia, but also likely the prospects of Ukraine's accession to the EU. It would be impossible to integrate into a Union with geopolitical ambitions countries whose neutrality is linked to international constraints that include an adversary like Russia. The first decisive test of relations between Europe and Trump's America will therefore be the willingness of the new President to agree with the Europeans on the conditions of the negotiation and in the meantime to continue without interruption the military and economic support for Ukraine. For their part, Europeans must organize themselves to assume their responsibilities in a credible way.

The other issue that will affect Transatlantic relations is the growing importance of China and more generally of the Indo-Pacific. There are two superficial errors that are frequently found in the European debate as in the American one: on the one hand, the idea that "Europe is the Europeans' business", on the other hand, that China and the Indo-Pacific are not really Europe's priority or that they are in a very different way than for the United States. In essence, the error is in thinking that the two theaters are separate. Nothing could be further from the truth. Regardless of the obvious analogies of Ukraine with Taiwan, Russia and China are allies, Iran arms Russia and North Korea sends weapons and men to the war in Ukraine; while Japan, Australia and Korea arm Ukraine. Furthermore, Russian and Chinese influence continues to increase in Africa. There are no separate theaters. At most, priorities and interests are not always convergent between the allies; they are real issues that must be addressed.

The third issue to be addressed concerns the Middle East and in particular the ongoing war after the terrorist attacks of 7 October 2023. In this regard, we cannot fail to acknowledge that the issue is highly

emotional on both sides of the Atlantic. On the one hand, the attitude towards Israel is everywhere conditioned by deep emotions linked to the different memory of the Holocaust, but also by the different weight of the Jewish and Muslim communities in the various countries. Even if everyone recognizes the legitimacy of the Israeli response to the attack of 7 October, this leads to different assessments of the sustainability of the price paid by the civilian population of Gaza. Furthermore, on few issues like this one is the asymmetry of the power of effective intervention between Europeans and Americans evident. In substance, however, the difference between the European reaction and that of the Biden administration has been much less than emotions could suggest: firm support for Israel, but moderating action towards the military reaction considered legitimate, mediation effort for a ceasefire and the release of the hostages, and finally, insistence on the solution of the Palestinian question on the basis of the two-state formula. This last element is more evident on the European side, even if the recent elections have shown that the importance of the Muslim vote is growing also in America. It is a fact, however, that, faced with the intransigence of the Israeli government, neither the American efforts nor the European support have given positive results. This has led everywhere in Europe to a clear decrease in the level of tolerance for the consequences of the Israeli attacks on Gaza and now on Lebanon.

What will Trump's policy be? The indication that comes to us from the first mandate is: unconditional support for Israel, sharing the strategic priority of the confrontation with Iran, tolerance of the growth of the colonies in the West Bank, bypassing the Palestinian question with the conclusion of the Abraham Accords. It must be recognized that it was a strategy not devoid of logic that also obtained some success and that met with interest on the part of the Arabs and at least acquiescence on the part of Europe. The question now is whether the cornerstone of the first Trump's strategy, the Abraham Accords, can still hold up after the Gaza war and the effect it has had not only on Western public opinion, but also on that of all Arab countries, inevitably including their governments. The Europeans are convinced that the strategy must be changed, including by increasing pressure on Israel. The reality is instead that of an Israeli government, probably convinced of Trump's unconditional support, determined not only to continue hostilities, but also to deny any prospect of a solution to the Palestinian question even at the cost of spreading the feeling that the real objective is a mass exodus. The appointments of Elise Stefanik and Mike Huckabee as ambassadors to the UN and Jerusalem respectively, suggest that the strategy will be one of unconditional support for Netanyahu with the primary objective of isolating Iran without caring about the Palestinian question and the future of Gaza. If this is the perspective, it is very likely that it will prove incompatible with the logic of the Abraham

Accords. Trump would be making a serious mistake in not seeing that the war in Gaza has significantly limited the freedom of maneuver of those Arab governments that are important allies for the US and constitute an essential component of the objective of isolating Iran. In all this Europeans can do nothing but maintain their positions of principle, being ready to accompany constructive evolutions without, however, neglecting the negative psychological effects that a divergence of positions on the Middle East could have on the whole of Transatlantic relations.

Can we do it? The problem of leadership

In the preceding paragraphs I have attempted to summarize the main issues that will affect relations between Europe and Trump's America. These are challenges that are in some cases very difficult, but that are not impossible for a Europe determined to react. The problem is not so much what to do, but how. Observing the European scene, one gets the impression that the main obstacle is not political divergences, but a widespread pessimism. Many things add up: the weariness of aging societies lacking dynamism and affected among other things by economic stagnation followed by a pandemic, jealousies of emerging nationalisms and unstable internal situations exacerbated by growing populism; without underestimating the effects of a creeping destabilization enacted by Russia. Texts such as the reports by Letta and Draghi are greeted with unanimous praise for their analysis, accompanied by unanimous skepticism about their implementation. Remember the joke by Jean Claude Juncker?: “we know what to do, but we don't know how to get re-elected after having done it.” The question is how to escape the trap of Euro-pessimism. In some ways, the situation also recalls the Eurosclerosis of Europe in the 1980s. Even then, Europe was weakened by a long economic stagnation following two oil crises and politically exhausted by many years spent almost exclusively discussing the British contribution to the common budget. The shock was given by the strategy of Jacques Delors, towards market integration and then towards the euro. Today the context, internal and international, is objectively much more difficult. The priority should however be how to overcome pessimism.

A disoriented public opinion, often polarized, partly refractory to change and that feels abandoned by the elite, can hardly be mobilized by the enunciation of an ambitious overall program. Proclamations such as the one from the recent European Council in Budapest are certainly useful, but it is doubtful whether they are able to mobilise opinion. What is at stake is not so much the credibility of the programmes, but that of those who enunciate them; with the result of giving voice to those who would

feel potentially damaged, in the silence of those who doubt the positive results. It is important that an overall strategy exists as a background for public action, but pessimism can only be overcome by demonstrating that it is possible to achieve concrete progress. This is how, in the 1980s, the skepticism that had greeted the project of integrating European markets was overcome. An accumulation of small concrete decisions made it possible to create a critical mass of consensus in the business world, which then led entrepreneurs to mobilise and support the project with their behavior.

At this point the inevitable question is: who are the actors? There are many. Europe certainly has a leadership problem, but it cannot be solved with simple formulas. It will have to be exercised at different levels. The first is that of the institutions and in particular of the European Commission. Its task could be to guide the process in some sectors, such as trade and regulatory issues, especially maintaining a clear coherent background. The second level is that of governments. Only they can guide the process for some important economic choices, but above all for the essential issues concerning geopolitics and defense, starting with Ukraine. As we know, governments are all weakened by the growth of populism and the consequent polarization of politics. They also find themselves in an unfavorable situation. Many agree that the main danger is represented by the division that Trump's initiatives can cause; by the impulse that many governments will have to run separately to Washington to obtain bilateral advantages. This is certainly what Trump wants and perhaps expects. In a sharp commentary on the first phase of the Russian aggression against Ukraine, Ivan Krastev, celebrating the unexpected unity of Westerners, predicted that possible divisions would emerge when solutions to the conflict started to emerge.

It is widely believed that the situation cannot be unblocked within the usual European procedures. Certainly not in the very rapid timeframe required. The experience of Orban's obstructionism is instructive in this regard. Many therefore speak of the need for groups of countries to unite to show the way. However, this requires imagination even with respect to the flexibility offered by the current rules. The model I would suggest is an initiative of the type that was once taken in Schengen by France, Germany and Benelux and which led to the abolition of controls at the internal borders of the EU: outside the existing treaties, but open to all and attentive to dialogue with the Commission. In the current circumstances, it is perhaps the only way to provide the necessary jolt. However, we must ask ourselves whether it is possible to gather the necessary critical mass around such an initiative. Here the problem of leadership returns.

France is in the conditions we know. In Germany the prospects are better in the sense that the arrival of a CDU-led government is foreseeable, less uncertain and fragmented than the current one. I mention them because these are the two countries to which traditional opinion attributes the task of showing the way to others and whose consensus is in any case necessary for progress. Among the other "big" countries, Giorgia Meloni is the only leader who can count on a certain stability and her influence is not negligible. However, she must decide the scope of her ambitions. If she wants to lead the Europeans, she must resolve the ambiguous position in which she has placed herself with respect to the European policy of the majority of governments and the European Parliament; therefore, overcome the distrust that she inspires in many parts of the EU. If, on the other hand, she wants to propose herself as the EU's "bridge builder" towards Trump, an ambition that is incompatible with the previous one, she must deal with Italy's delicate position with respect to Trump's claims: not only Italy's poor commitment to defense, but also the second largest trade surplus after Germany's.

Perhaps it is time to consider that the balance within the EU has changed somewhat. In addition to the traditional "big" countries (three after Brexit), an arc of countries is emerging that goes from Scandinavia to the Baltics, up to Poland. None of them are among the founders and some of them have so far shown a certain reticence in the face of the methods of traditional Europeanism. However, they are countries that often have a dynamic and competitive economy and, except for Poland, considerable political and social stability. Above all, they have the characteristic of having been the only ones to see, in the denial of almost all the others and especially of the "big three", the real nature of the Russian threat. They therefore have an indisputable authority in the field of security and defense. Their voice today carries weight and their credibility in Washington is superior to that of many others. Their authority has recently strengthened since we have seen the commitment to support Ukraine weaken not only in America, but also in some European countries. It is interesting to note that Donald Tusk's current political and diplomatic activism goes exactly in this direction. If this activism were to lead to a structured initiative, the question would be how to give it critical mass. This brings us back to the Franco-German problem. There is little point in speculating on this, but it is not impossible that the operation could succeed, if only because this "north-eastern arc" has long been an important reference point for German politics. In this case, Italy and certainly others could hardly avoid it.

The third level at which to exercise leadership is broader than Europe. Europeans are by no means the only allies for whom Trump's policy can create serious problems. For different reasons and in a different context, countries such as Japan, Australia, New Zealand and South Korea will face difficulties not unlike ours. Greater coordination between Europe and these Asian democracies is what Kevin Rudd, former Australian Prime Minister, suggested during Trump's first term. Moreover, we have recently witnessed, and also under Italian leadership, a greater commitment from the G7. Commitment that has been shown on some strategic issues of common interest, such as access to critical raw materials or the reorganization of supply chains for some sensitive technologies. Commitment that has also extended to issues related to security. Greater cohesion of Europeans and Asian allies would probably have an impact on Trump's policy.

Finally, there is an opportunity almost on our doorstep. Brexit has been a disaster for the United Kingdom, but also for the EU. Everyone agrees that a rapprochement is in the general interest, even if we all know the objective difficulties. In addition to the common economic and commercial interests, there are now the challenges posed by American politics. We know how traditionally Great Britain has been balanced between the two sides of the Atlantic. Trump's America should, however, help to clarify the misunderstandings. With the strategic illusions of Brexit having faded, any serious analysis shows that the interests of the EU and the UK are convergent. This is even more true in the field of security and defense. Britain has in fact been one of the most determined European countries in substantially bipartisan support for Ukraine, it already has an agreement with France in the field of defense and has recently started one with Germany. It is also traditionally very close to the "north-east arc". Making a new convergence based on pragmatic and innovative solutions more operational and structured should not be impossible. Here too, a bit of imagination will be needed.