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After spending a few months discussing an imaginary Trump 2, Europeans are now faced with the real one. They are not alone. In the end, facts will count, but for the moment we have above all words and formal acts that are mainly programmatic and not always executive. I am referring to his inaugural speech, to the first decrees signed immediately after his inauguration, but also to the numerous speeches of the last few days; they are all speeches from which Trump's habitual conflict with the truth also emerges. All this has been widely commented on and does not require summaries. It will suffice to note that the "inaugural Trump" retains the oratorical style of the one during the election campaign: the deliberate desire to project the image of the "crazy horse" who speaks in an unpredictable and sometimes violent way in order to intimidate and destabilise the interlocutor. Unpredictability is a behaviour that deterrence theory deems useful in certain conditions with respect to adversaries. Trump instead uses the same methods also with respect to allies.

Some analyses by Europeans but also Americans embrace what seems to be a risky and at the very least premature prediction: interpreting Trump's re-election as a radical paradigm shift that some have even called an apocalypse. This approach, conveyed by Trump himself and his supporters, is also shared by many of those who see Trump as a danger. For the new President and his base, the project is to revive a country in ruins and ignobly exploited by rapacious foreigners. The obstacle to be overcome is an internal conspiracy that has undermined the health of the institutions to exploit them to its advantage; the word used several times is "treason". For many internal opponents and external critics, Trump instead presides over the end of an era: that of liberal internationalism or even of democracy itself. For some, the parallel with the 1930s is evident; for others, January 20, 2025 would have almost the same value as November 9, 1989. It is understandable that the winners emphasise the significance of their victory. But what about the losers? One reason is the reluctance of many progressives, in America but also in Europe, to seriously deal with the reasons for their defeat; starting for example with not understanding the importance of the issue of irregular immigration for a large part of the electorate or the reaction to some excesses of wokism such as "gender theory". Or the renunciation by some of their universalist vocation to fall into the "identity trap" well described by Yascha Mounk, without realizing that the identity card suits reactionaries much better than progressives.

Trump's electoral victory was indisputable but of limited proportion, even if amplified by the distortions characteristic of the American electoral system; the result also allowed Trump to obtain control of Congress, but with extremely reduced majorities. It was a victory determined above all by the defection or more often by the abstention of some social groups traditionally close to the Democratic Party. At least for the moment, it is premature to think that we are facing the formation of a new political and social bloc, like the one that allowed a lasting cultural hegemony of the Democrats after Roosevelt or that of the Republicans after Reagan. Before deciding that Trump's predominance opens a new historical phase, we will have to wait at least for the midterm elections for the partial renewal of

Congress - a deadline that is rarely favorable to the incumbent President, especially when he cannot aspire to a new mandate. In essence, it is a horizon of less than two years.

A fragile social base and programme

The social base that led Trump to victory is the expression of the fractures that run through all democratic societies and that are determined by the difficulty of governing the tumultuous changes of recent decades. Trump, like the European populists, has been able to gather around him the losers or presumed losers of a change whose disruptive effects are due in equal measure to globalisation and the technological revolution. On closer inspection, however, the "traitors" or defeated enemies, although all in some way connected to the Democratic Party, are in reality multiple and partly incompatible with each other. For the populist base, they are the large corporations and more generally the globalists. For the "techno-oligarchs" who supported him, they are the federal bureaucracies obsessed with the desire to regulate everything. For the more traditional conservatives, it is the wokism that nests in universities and that has contaminated the media, schools, part of the State and even the armed forces. For everyone, they are rapacious foreigners who want to live at America's expense.

The new techno-oligarchs are those who have attracted the most attention. Their presence next to the new president, immortalised in the inauguration photos, is certainly the most intriguing aspect of the new course. Their adhesion to his policies is in many cases recent and in some cases occurred even after the elections. Even if for some of them the homage to the winner seemed not very honorable at least in timing and manner, the thing is in some respects logical and should not be surprising: one of the laws of capitalism is that it is appropriate to have good relations with power of any kind, especially when it is embodied by a notoriously vindictive person. All the characters portrayed in the photo were young Schumpeterian innovators who defined themselves as bearers of freedom and equality; which often pushed them to show political affinity with progressives. Their extraordinary success then transformed them into a group of oligopolists whose libertarianism is now expressed in the rejection of any type of regulation. They are therefore united among themselves and with other sectors of Trump's electoral base by the promise of a drastic reduction in the rules and by tax breaks. However, they remain lions in fierce competition with each other and with interests that are often distant from those of other, more traditional, sectors of the electorate. In particular, they are entrepreneurs who need globalisation like the air they breathe. Some of them deserve a separate discussion, such as Peter Thiel and especially Elon Musk, whose libertarianism has taken on the colors of a political project with clear illiberal and antidemocratic connotations. In the case of Musk, the strategic contours of his project are very difficult to understand at the moment; from the obvious defense of his industrial interests spread throughout the world, to the form of autism he suffers from and the disturbing psycho-motor extravagances with which he expresses himself, to the indiscriminate use of the media he owns to spread disinformation and political destabilisation under the banner of absolute freedom of expression. If the choice to support a stable and established leader like Giorgia Meloni in Italy seems natural, in other countries like France, Germany and the United Kingdom, Musk has instead bet on horses that have little chance of being winners at least in the foreseeable future. If this is meant to be a component of Trump's plan to disarticulate Europe, the approach is at the very least counterproductive. In essence, if all winning electoral coalitions necessarily include their share of contradiction that the wisdom of the leaders will then have to compose, the one that supports Trump seems particularly unstable. If it is justified to call the technological champions now aligned with Trump "oligarchs", the phenomenon has nothing to do with the oligarchy that has been built around Putin. The Russian phenomenon in fact brings together everything that matters (which is not much) in the Russian economy; a coalition that can therefore form the basis of an autocracy. The American economy and society are, however, immensely more complex, pluralistic and characterised by interests whose composition can only occur thanks to the mechanisms of a democratic system. Trump's cohabitation with these techno-oligarchs will not be simple, however, as demonstrated by the TikTok affair.

Government programmes seem equally contradictory. Much has already been written about the economic one. The problem will be how to keep the promise of defeating inflation, which was one of Trump's main electoral weapons, with that of bringing America back to the glories of manufacturing, but also to the peaks of innovation in artificial intelligence, while at the same time drastically reducing rules and taxes. All this theoretically makes sense only if the rest of the world pays with massive increases in customs duties, of which it is not clear whether they serve primarily as a bargaining tool to obtain concessions of another kind, or if, as is sometimes claimed, they must become a cornerstone of the financing of the federal budget and therefore allow a drastic reduction in other taxes.

The same goes for the basis of Trump's foreign policy programme. It seeks in fact to bring together in a comprehensive vision the will to reduce the military commitment outside the borders with the abandonment by America of its "liberal mission", but also to impose on the rest of the world behaviours in line with American interests, with the addition of some territorial claims (Panama, Greenland, even Gaza) of a distinctly imperial flavour that seem to take us back to the presidency of William McKinley at the end of the 19th century. All with the belief that the mere existence of the preponderant force of the United States can be enough to obtain the desired behaviours. Now, it is clear that no one will refuse to negotiate a priori, but it is equally evident that, in accordance with the laws of deterrence, the value of American force depends on the perception that the potential recipients have of it. Neither the force of Goliath, nor that of Fafner guarding his cave, have ever managed to discourage David and Siegfried; there must be a reason why our mythology is full of symbols that show the vulnerability of brute force. The current adversaries of America and the West are not driven by self-interest alone, but by the desire to undermine the existing order. Even the offer to countries like China and Russia to negotiate a "new Yalta" with mutually recognised spheres of influence would inevitably appear as a great demonstration of weakness; it is a prospect that, as far as Ukraine is concerned, would be more like Munich than Yalta. Ultimately, the thermometer of the strength and duration of the Trumpian coalition and therefore of its leader's ability to bring about a lasting change in America and the world will be represented by the evolution of the degree of loyalty that the narrow Republican majority in Congress will express in the perspective of the mid-term elections. It is now at its highest level, even if some cracks have already been noted.

The impact on Europe

Trump's first gestures as President reflect his recognised political skill. A lesson that many leaders with reformist ambitions tend to forget is that the first acts of government must have the priority objective of consolidating and strengthening the electoral coalition that brought them to power. We have therefore witnessed a first flurry of "executive orders" that not only touch on all the most sensitive points of the electoral programme, but also concern issues to which large segments of the electorate are partly sensitive, including moderates close to the Democratic Party. The issues are: a profound reform of the federal bureaucracy in order to make it more efficient and less intrusive, but above all loyal to the power of the President; a bureaucracy, it is worth remembering, that is already more dependent on political power than is predominantly the case in Europe; a radical step back from Biden's programmes on climate transition; the exit from the WHO; the temporary suspension of almost all international aid programs; a radical programme of deregulation in the media, new technologies, energy and the environment; the first vigorous steps to give substance to the promises to expel several million illegal immigrants, including a large number of minors, which, in this context, questions the constitutional principle of jus soli for the acquisition of nationality; the explicit abandonment, with the more or less justified accusation of wokism, of federal programmes intended to promote inclusion and diversity; finally, the amnesty granted to those responsible for the criminal assault on the Capitol on January 6, 2021.

The turning point is indeed of great importance, so much so as to lead to fears of a weakening of the rule of law and of democracy itself. On the other hand, it is a programme that will have to deal with the powers of the states and the inevitable legal disputes. The American system is full of counter-powers explicitly devised by the founding fathers precisely to prevent phenomena such as the one we are witnessing. Not to mention the practical difficulty of expelling millions of people and that of profoundly reforming a public administration with the criteria of a private enterprise. The adventure has only just begun and Trump is already discovering how difficult it is not only to stop illegal entries, but also to organise large-scale expulsions. However, we are especially interested in the repercussions that all of this will have on Europe.

In the immediate future, there is the risk that all of this will contribute to giving breath to the populist far right already on the rise in many European countries. It is a prospect that will certainly resonate in the rhetoric of political debates, but which must not be overemphasized. First of all, the concrete contexts, for example in terms of immigration, are very different. After all, Europeans do not need Trump to express in their majority the hope for more rigour in terms of irregular immigration. Furthermore, populists, like Tolstoy's unhappy families, are each unhappy in their own way. That Giorgia Meloni, after having skillfully played the card of Italian Atlanticism to gain credibility with Biden, now plays that of ideological affinity to establish a special relationship with Trump, is part of the normal exercise of power. However, it is equally relevant that the other far-right party not far from power in a large country, the one headed in France by Marine Le Pen, is keen to mark its distance from Trumpism. Above all, Trump must not become an alibi. Dealing with the far right is Europe's problem that Europe must face alone. The issues destined to condition the future of transatlantic relations under Trump, however, are different. In any case, even if the confrontation were to become more intense, Europeans would have neither the interest nor the possibility of using the "crazy horse" technique that Trump seems to favour. Europe will have to be firm, but pragmatic and rational. Whatever the dispute with the US, it will be in the interest of Europeans to preserve as much as possible the prospects of unity of the West. To give two examples, it is not in Europe's interest that the attempts to "de-dollarise" the world economy promoted by the BRICS succeed, nor that China prevails in the technological competition or in artificial intelligence. It will not always be easy to keep the course straight. If Europe has ceased to be a priority for many Americans, the degree of anti-Americanism in Europe has never been so high since the end of the Cold War.

The first probable battleground concerns Trump's threat to massively use customs duties to get what he wants from his interlocutors. The only certain thing is that it is a weapon that Trump intends to use systematically and for disparate purposes. How he will use it against Europe remains to be seen. Of all the possible battlegrounds, this is perhaps the one in which the EU is best equipped to react. A large market already highly integrated with the American economy and which America cannot give up, the

EU has various tools to manage the crisis should it arise. Wisdom will encourage the Europeans to act pragmatically, to prepare possible retaliations aimed at maximising the political damage to Trump, but also to negotiate in good faith. The risk is obviously that individual members will rush to Washington to obtain preferential treatment, but common sense teaches us that the European economy is too integrated for the damage suffered by one country not to automatically have repercussions on all the others. One sure cost that will derive from an accentuated American protectionism concerns the reorganisation of supply chains, a path that all Western economies are embarking on after the pandemic and to face Chinese competition. With Biden, it seemed possible to explore common paths (friendshoring) both for supply chains and for access to critical raw materials. With Trump everything will probably be more difficult. A European response that is already clearly emerging is the desire to intensify relations, both commercial and political, with other countries that risk having similar problems to Europe's with Trump. This is first of all a question of strengthening collaboration with the United Kingdom, trying to bridge as much as possible the fractures that have opened up with Brexit. Furthermore, Europe will have to deepen ties with other US allies in the Indo-Pacific, such as Canada, Japan, Korea and Australia. Finally, strengthening economic and commercial relations with non-aligned countries in Asia and Latin America is important; the draft agreement with Mercosur is a good example.

Still on the economic level, the riskiest terrain is another. Europe has long been engaged in a complete re-examination of the conditions of its competitiveness with respect to China and the US. The recent reports by Mario Draghi and Enrico Letta provide a merciless analysis of the reasons for this loss of competitiveness and Europe's delays in innovation. A central aspect of the analysis concerns the need to re-examine European rules, including the illusion of being able to regulate for the entire world technologies that we do not possess and of being too far ahead of our competitors in terms of rules relating to the climate transition. This exercise was facilitated by an America that was somehow moving in a direction convergent with ours. The Trade and Technology Council is a useful framework for dialogue and collaboration. It is possible that the drastic turn of deregulation and abandonment of the climate transition effort that Trump intends to impose, constitutes a stimulus for the EU to overcome its reticence and proceed along the path indicated by Draghi and Letta. There are, however, issues that will require more difficult choices and could put Europe in an inevitable clash with the US. One example is the climate transition. Even if the EU is determined to review the timing and methods of the green deal, the distance that separates it from the denialism that currently characterises American politics is enormous. Another clear case is that of the regulation of the digital economy and artificial intelligence. On both of these issues, the EU has given itself rules that have not yet been fully applied and are the subject of controversy. On the one hand, their principles respond to widespread beliefs in European society; for example, in terms of protecting privacy and combating disinformation on digital platforms. On the other hand, however, their concrete application has highlighted how difficult it is to regulate constantly evolving technologies. Europeans are actually aware that the right balance can only be reached gradually and that this requires constructive dialogue with operators. While until recently large platforms such as Meta and Alphabet were willing to talk to Brussels to find mutually satisfactory solutions, they are now asking the US government to defend them against arbitrary European impositions. These are all areas where pragmatic compromises are more difficult than for trade issues. For example, the disinformation now being spread on X by Musk is added to the massive disinformation from Russia on multiple platforms, which all European governments are committed to combating. This opens up a potential political dispute between the US and the EU, which, moreover, does not only concern regulation, but also the decisions of the antitrust authorities and the fiscal consequences of Trump's decision to reject the agreements reached at the OECD on the minimum taxation of multinational companies. It is not even excluded that an old controversy will be reopened on the alleged discriminatory nature of VAT, a central tax in the European system and absent in the United States.

Finally, there is geopolitics, foreign and defense policy. In that context, there are many variables, from China to Africa to the Middle East. It would be a mistake in particular to underestimate the disruptive potential of the Greenland issue. However, what will affect transatlantic relations more than anything else is the future of the war in Ukraine. Today, we can only speculate on Trump's possible moves to implement his promise to end the conflict. However, much more than the future of that piece of Europe called Ukraine will depend on the response that Europeans are able to develop. What is at stake is Europe's credibility on the international stage, certainly the future of a possible European defense force within NATO, and the possibility of establishing a credible deterrence in the face of a threat from Russia, probably the very future of the Atlantic Alliance. Perhaps even the process of European integration itself. It should not be overlooked that it will not just be a matter of reacting to Trump. What Europeans are able to do will affect the political climate in the United States; something that Trump will be forced to take into account.

But can Europe do it?

If we look at the different analyses available to us, but above all at the official positions taken by the institutions, such as the announcements by Ursula von der Leyen and the recently published Competitiveness Compass that draws on the analysis of the Letta and Draghi reports, a benevolent observer might conclude that a clear European strategy is already being consolidated. There is also considerable diplomatic activity underway involving the institutions and a large number of governments to define a strategy on security and in particular on Ukraine. These are all good starting points. However, as important and useful as the overall strategies may be, nothing permits us to think that facts will follow. The question that Europeans face is not so much "what" to do, but "how". There are essentially three obstacles. The first is constituted by the inevitable non-coincidence of the governments' visions. The second, by the recognised inadequacy of the EU institutional system responsible for resolving divergences and by the sometimes Byzantine complexity of European procedures. This is not true in all areas. In some cases the system can react quite quickly, but where there is a unanimity obstacle, everything is at constant risk of paralysis. This is especially true when acting at the margins or even beyond existing treaties, as in the field of security. All this would be less serious if on virtually all important issues the international context did not put the EU under unprecedented time pressure.

This brings us to the third obstacle: widespread pessimism about Europe's ability to adapt to the challenges of the modern world. The refrain from the media, analysts and many policymakers is constant: we know what needs to be done, but it is highly unlikely to happen. What is surprising is that this pessimism is more widespread inside than outside Europe. A recent survey by the European Council on Foreign Relations tells us that in the rest of the world a significant proportion of citizens believe that Europe is destined to be a major international player; a view that is not shared by the majority of Europeans. However, this international opinion is probably due more to the desire to have another major player in addition to China and the USA, than to real confidence in Europe's capabilities. How can we hope that the rest of the world will take us seriously if we are not capable of doing so ourselves? Overcoming this pessimism is therefore the main challenge we have before us.

Under these conditions, it is clear that programmes and strategies, however well conceived, are not suitable for moving the energies of an apathetic and skeptical public opinion. In the impossibility of rapidly implementing the reforms that the EU would need, there is probably only one way: to show through specific and concrete achievements that progress is possible; starting with a limited number of priorities and conceiving each success as a condition for strengthening consensus for subsequent ones. Some things can be done within the institutions, others will have to arise from initiatives taken by a critical mass of members, waiting to be transformed into truly common actions; according to the model once adopted for Schengen. The primary objective must be to create the conditions for not having to submit to vetoes of the type practiced by Orban and to make recalcitrant and latecomer countries bear the "cost of non-decision". The Commission itself, whose main task is to ensure the unity of the whole, seems to be aware of this and willing to accompany the process rather than oppose it. All this implies a willingness to "think out of the box" and will require a certain amount of flexibility and imagination in the interpretation of the rules. From this perspective, great importance will be given to actions aimed at consolidating the confidence of the business world, on which innovation and investment decisions ultimately depend. A world that has recently been at the forefront of demonstrations of pessimism.

Such a dynamic approach is all the more necessary as we know that many have the ambition to divide Europe. To the traditional objective of our adversaries (Russia, China) we can now add Trump's evident will. We must of course resist, but we must also be realistically aware that the attempt at division is bound to have certain success. How should we react? The price to pay for unity at all costs would be paralysis or ineffective compromises, which would only consolidate the pessimism that we want to overcome. A certain degree of division is therefore acceptable, provided that we work for the consolidation of that critical mass of willing countries that I spoke of above. What is the dynamic that can favour such an aggregation?

We must avoid two traps. The first is to resuscitate the myth of the "founding countries". This is a sterile path. First of all, the latest enlargements have completely changed the nature of the EU; then because of the difficulties currently being experienced by the two largest countries, France and Germany, whose weight is still preponderant, but which are currently unable to exercise their traditional leadership. The second trap is to imagine aggregations according to ideological criteria. In the current EU, ideological affinities exist but have limited weight. The EU is not a parliamentary republic with a government majority and an opposition. Political majorities are formed in the European Parliament, but the so-called "European parties" are still groupings in search of a true identity and which, when faced with concrete issues, often divide along national lines. Just think of the three far-right groups that disagree on practically everything except immigration. The ideological fractures that exist in Europe certainly matter, but more for the influence they have in determining the balances and strategies of individual member countries than at a European level.

The aggregations that are likely to influence events are instead formed on the basis of the vision that the various countries have of their role in Europe and in the world. At this stage, the group that emerges most coherently is formed by the range of countries that goes from Scandinavia to Poland, with the possible addition of the Netherlands. There is a notable convergence in these countries in the priorities of European politics, both domestic and foreign, regardless of political color: they include governments led by socialists or populars, but also with the participation of far-right parties in various capacities. They share a strong unity of views on Russia and Ukraine, and there is a certain convergence on the major economic policy options, on innovation and on openness to the outside world. They also often have what it takes to be taken seriously in Washington; for example, on military spending.

For all its merits, this deployment does not yet reach the critical mass needed to create real dynamism. Germany's contribution will certainly be essential after the upcoming elections; the behaviour of Friedrich Merz, the probable future Chancellor, seems to anticipate this. The French presence will also be essential. It is in fact difficult to imagine a critical mass of Europeans without the contribution of the country that has the strongest military apparatus, both operational and industrial, within the EU. Macron seems determined to play this game. While the central role of the two largest countries is indisputable, their authority and ability to exercise credible leadership are today greatly weakened. Partly because of the internal instability, but also because of factors that have weakened mutual trust between the two countries and the rest of the EU towards them. Germany will have to dispel any doubts about the scope of the *Zeitenwende* proclaimed by Scholz in the aftermath of the Russian aggression against Ukraine and never truly implemented. France, on the other hand, will have to definitively clarify the differences that have always existed with many European countries on how to conceive Transatlantic relations; differences that with the prospect of a problematic or even conflictual relationship with Trump's America change in nature, but are not automatically resolved. This is demonstrated by the fact that the "strategic autonomy" proposed by Macron remains undefined, but also by the persistent difficulty in specifying the terms and limits of the preference to be given to European military production in the construction of a common security policy. Both will therefore have to approach relations with their neighbors with a certain amount of humility and willingness to listen.

If it were to be credible and cohesive, such an aggregation would have the characteristics of being able to constitute a sufficiently powerful engine, which would exert a certain attraction in the East and also in the South. In this perspective, the question of the "third big", Italy, obviously arises. Looking at Giorgia Meloni and the way she has played the cards of her European and international policy so far, one can hazard the following prediction. As long as she can, she will try to preserve the ambiguity between European imperatives and the appeal of good relations with Trump. If the division between Europeans were to prove deep and difficult to heal, it is easy to predict that Meloni will give priority to the bond with America. However, faced with the formation of a solid center of gravity such as the one defined above, the realism she has demonstrated so far will probably push her to try to remain connected to Europe. Whatever the perspective, Italy's credibility is weighed down by the low level of its military spending. Finally, one must not overlook the fact that, especially in the perspective of initiatives on the margins or even outside the formal game of the institutions, the United Kingdom is destined to potentially assume a significant role.

As can be seen, this is perhaps the most decisive game since the beginning of the European adventure. If it were to succeed, it could also create the conditions for more ambitious reforms in the perspective of the next enlargement of the EU. The conditions for emerging from this with a stronger Europe exist. But we must believe in it.