



Research Center  
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## **Europe and Trump: How to avoid the apocalypse and manage chaos**

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It is widely believed that in recent times we have never witnessed such an uncertain, dangerous and difficult to decipher political and international situation. Not that the post-WWII period has always been “a long, quiet river”. We cannot forget that we woke up one day in October 1962 to the US President’s announcement that the Soviet missile crisis in Cuba risked leading to a nuclear war, a President who was also assassinated a year later. In the following decade, on August 15, 1971, another US President announced the end of the monetary order that had governed the world since the end of the war. Two years later, the explosion in oil prices put an end to the long period of post-war economic growth. On October 7, 2023, we had to endure the images of the most horrendous pogrom of Jews that had occurred since the end of WWII. Not all upheavals have been so unpleasant. For example, on November 9, 1989, we woke up to see young Germans tearing down the Berlin Wall undisturbed. And so on.

What makes the current situation so unprecedented? The answer is that all these memories refer to a time when America’s policy, to use Henry Kissinger’s categories, positioned itself as the guarantor of the stability of the international geopolitical, commercial and monetary system. The “revisionist” powers always had to somehow deal with this role. It was a system of which America had been the main architect, but also a great beneficiary. This entailed privileges defined by Valéry Giscard d’Estaing as “exorbitant”, but equally great responsibilities. No one will dare to argue that America exercised its role as hegemonic guarantor without miscalculations, abuses and contradictions. The aforementioned breakdown of the Bretton Woods agreement in August 1971 or the second war in Iraq are two obvious examples. However, it must also be recognized that the “American century” has so far avoided the third world war, led to the collapse of communism and allowed for an economic and technological development that today extends well beyond the borders of the West. Europe, saved by its American ally from two suicide attempts in the first half of the last century, was a great beneficiary of this process; the “American century” was also largely “the century of the West”. Finally, the American political system, governed by consolidated democratic institutions whose functioning was often consensual in matters of foreign policy, was generally predictable and legible by allies and adversaries. This is no longer the case.

Analysts above all, but also public and private operators, are primarily looking for certainties or at least conceptually plausible references. Trying to understand the objectives of a nation begins with the question of what vision it has of itself and its role in the world. If we look at Putin’s Russia, at the convergence between what it says and what it does, the answer is clear. The same can be said, albeit with less certainty, of Xi’s China. For 20<sup>th</sup>-century America, the answer was also quite clear: that of being invested with the benevolent mission of spreading well-being and freedom, symbolized by the famous image of John Winthrop’s “Shining City Upon a Hill”. That America was modifying this vision of itself in light of the changed balance of power was already true at least since Obama’s presidency. Today, however, we are dealing with a US President who does not want to modify that vision – he wants to

overturn it. In fact, he theorizes that it has led internally to the affirmation of a technocratic and globalist elite, while externally it has allowed adversaries and allies to enrich themselves at America's expense. In other words, we have a "revisionist" America. Not only that: we have a President who theorizes that unpredictability is the main instrument of political action. Such a radical change after an election won by just over two million votes necessarily had to cause uncertainty and dismay among adversaries and allies alike.

How should we interpret Trump's America? There are essentially two conceptual models available on the market. The first is reassuring. Trump is a passing phenomenon; he represents turbulence, a moment of adjustment in American society; once the parenthesis is closed, the course of events will resume as before. The reference is obviously to his first term. What the allies must do is therefore simple: resist, put the boat under cover, keep the dialogue open and wait for the storm to pass. The first hundred days of the second term have amply demonstrated that this interpretation is too optimistic. While it is true that a great nation does not easily give up the identity it has gradually built over a long and largely glorious history, Trumpism is nevertheless the expression of internal fractures and conflicts in American society that are too deep to be dismissed as a passing turbulence.

## **The apocalypse**

The second theory is instead apocalyptic. It sees in the Trumpian experiment the project of a new model of society: nationalist, but above all illiberal if not openly anti-democratic. It must be said that on the ideological level the supporters of this theory have some solid arguments. Even if Trump himself is the antithesis of any coherent conceptual construction, there is in the rhetoric he uses and in the people who surround him an intellectual plot that authorizes us to think in this sense. This is a plot that goes from the libertarian anarcho-capitalism inspired by Norbert Rothbart, to the most current writings of people close to Trumpism such as Curtis Yarvin or Peter Thiel, to the famous "2025 project" coordinated by Russel Vought now a member of the Administration, up to the repeated statements of Elon Musk or P. D. Vance in favor of the European far right. It is an authoritarian model in the management of power, based on the prospect of replacing the cumbersome rules of liberal democracy with the salvific influence of technology and especially artificial intelligence. What distinguishes these modern reactionaries is a critique of liberal democracy that goes beyond formal institutions; it is imbued with libertarianism and is focused on the actual functioning of the state apparatus as a whole, including the bureaucracy and the judicial system. It is a plan that would like to forge the welding between a populism nostalgic of ancient values with the most advanced frontier of technology. As for the techno-oligarchs, it is too early to understand who among them, like the aforementioned Musk and Thiel, sees Trump as the incarnation of an ideological revolution and who, following Gianni Agnelli's famous maxim, theorizes that big business is by definition pro-government. For the moment, the famous photo in which they adoringly attend Trump's inauguration on January 20th is authoritative. Equally important are the consequences that can be drawn from this for international politics. A strategy based on alliances between democracies and the construction of a rule based world order, would be replaced by a return to power politics and therefore to imperialism. This explains the contempt for allies and the attraction to autocrats. From this perspective, the logic of the feared abandonment of Ukraine and the agreement with Putin would not be so much that of an attempt to separate Russia from China by repeating in reverse Nixon's feat in 1972, but to lay the foundations for a global agreement, a new Yalta between the US, Russia and China.

All this seems conceptually plausible, especially since it is supported, albeit with different articulations, by the statements of some protagonists, starting with Trump himself. The need for rigor must, however, encourage us not to be satisfied. One of the most common heuristic errors is to accept any logical shortcut to free oneself from contradictions and uncertainties, even at the cost of falling victim to the allure of connections: the temptation to find a unitary explanation for disparate phenomena at all costs. The risk is to fall into the trap described by Voltaire's famous quip about one of his opponents: "His convictions are contradicted only by the facts." If it is true that in politics ideas are only valid for the practical effects they produce, it is therefore the facts that we must look at. They tell us, for example, that the ideological coherence of the coalition that supports Trump is much more fragile than we think and is based on three main components: the aforementioned techno-libertarian capitalism, Christian fundamentalism, anti-globalist and nationalist populism. It is not difficult to understand that the worldviews to which they refer are incompatible with each other; at most they can only converge on the rejection of modern liberalism in some of its most controversial manifestations. There is, however, a limit to the possibility of solving ideological incompatibilities at the expense of immigrants, homosexuals or transgender people in a society that is also experiencing a process of secularization that can perhaps be slowed down but not stopped. There are those, such as Steve Bannon but also many liberal analysts, who argue that the potential conflict between populists, Christian fundamentalists and techno-oligarchs is irreconcilable regardless of the political contingencies of Trump's presidency.

Despite the ideological inconsistencies of the alleged apocalyptic plan, supporters of this thesis cite the evident weakening of liberal democracy throughout the West, but also historical examples such as the evolution of Putin's Russia or, an even more terrifying precedent, the rapid destruction of democratic structures by Hitler and Mussolini a century ago. One could also borrow a bold analogy that Ivan Krastev introduces in his latest work, *The light that failed*, regarding Orban's Hungary: the Frankenstate, a state that, similar to Mary Shelley's Frankenstein, is a mutant that exploits individual elements of liberal democracy to its advantage but selectively. Perhaps it is no coincidence that Trump and Orban appreciate each other very much. In human affairs nothing is ever inevitable, but one cannot ignore the fact that Russia and Hungary are countries that have never known democracy in the past, while Italy and Germany had democratic structures that were, to say the least, fragile and were affected by a serious economic and social crisis. In the case of America, we are dealing with the oldest and most consolidated democracy in the world, which has major internal problems but also a flourishing economy that many envy. After all, Germany and Italy can legitimately be considered two masterpieces of the "American century".

Finally, the two souls of Trumpian nationalism, the one that wants to annex Panama, Greenland and even Canada but at the same time put an end to America's many international commitments, are also incompatible with each other. It would be a Yalta in which America, after having satisfied its territorial ambitions, abandoned Taiwan to China and Ukraine to Russia, can calmly isolate itself in the shelter of its power. The problem is that China and Russia are "revisionist" powers par excellence; for them, the Yalta proposed by Trump would only be the beginning of a process. If it is therefore true that America can no longer afford the role of undisputed world hegemon, it cannot even afford to take refuge in the shelter of its oceans. The contradiction of Trumpism is that precisely the awareness of the need to scale back its global ambitions should push America to value the contribution of those allies that Trump is pleased to reject as leeches and profiteers.

In the end, the verdict will not depend so much on the inconsistency of Trumpism's ideological structure, but on the facts it produces. At this point, however, we cannot help but wonder whether in today's world the frontier between ideas and facts is not much more complicated than that hypothesized in Voltaire's aforementioned aphorism. In other words, we wonder whether the technology that presides over current communications and is now increasingly enhanced by artificial intelligence, has not produced, together with the unscrupulous and incessant use of lies, a virtual reality capable of modifying the very parameters of politics. It is a reality distorted by what we might call "Schrödinger's facts", which are true or false depending on the observer or even the number of likes they attract. All this in an increasingly polarized political climate that tends to also legitimize violence, to the dismay of those who dream of a democratic debate conducted according to the rules of the Oxford Union. We must certainly not underestimate these phenomena and the impact they have on the political balance of our democracies. However, in the end it is always the objective facts that dictate the law. Now, they are precisely the most dangerous enemy of Trumpism.

## The revenge of facts

The voters who brought Trump back to the White House and gave him a short but decisive majority in both houses of Congress did not vote because they were influenced by Norbert Rothbart and the other ideologues of Trumpism, or because they were fascinated by the "2025 project" that they had probably never heard of. For the most part, they did not even do so because Biden withdrew too late and because they did not consider Kamala Harris credible enough. It was first and foremost a sanction by the Republican and Democratic leadership groups that had governed the country in recent decades, a sanction with which the social groups underlying the aforementioned ideological components of Trumpism were able to identify, although provisionally. It is the expression of a widespread malaise that the old ruling classes had not seriously evaluated and that was due to very specific factors. First of all, inflation, but also the rejection of immigration perceived as out of control and linked, rightly or wrongly, to the increase in insecurity. Furthermore, social fractures buried in the data of a healthy economy have also played a role; fractures due to a change in technology and international trade that has been too rapid and poorly governed. The political and social implications of the decline of manufacturing have probably also been underestimated. Added to this is the discomfort created by two endless wars in Afghanistan and Iraq, the meaning of which had been lost and which also ended with a disastrous retreat from Afghanistan.

Finally, there is the fault of the Democrats for having allowed what goes under the name of Wokism to spread in universities, in the media and in other sectors of society. In essence, it is the betrayal of a universalist vocation, for which every claim and the struggle of any minority that believes itself discriminated against is transformed into an identity battle against a mythical white, Western and capitalist patriarchy. It is a drift brilliantly analyzed by Yascha Mounk in "The Identity Trap". As proof that the far right is always more skilled at the identity game than its adversaries, Republican propaganda has cleverly exploited the fear of Wokism, transforming it into the bogeyman of an America condemned to lose its soul and its values because of the Democrats: a country where universities are hotbeds of anti-Semitism and teenagers are encouraged to change their sexual identity at will.

Underestimated and not effectively countered, these messages have contributed to alienating sectors of the electorate that were considered acquired; for example, many young males belonging to ethnic minorities but culturally conservative, or white women who were instead expected to defend the right

to abortion. These are themes that, although to a different extent and intensity, also animate European populism. All these impulses are partly due only to perceptions, partly they are inflated beyond all reasonable measure. It can also be argued that they only concern minority groups of the population. What matters is that they require a response and the traditional ruling classes have proven to be in default.

Taking advantage of the moods of an electorate that was generically demanding radical changes, Trump presented himself as the incarnation of that radicalism. Consistent with his evident authoritarian impulses and his lack of respect for constitutional rules, every aspect of the electoral program has been applied from day one in a violent, radical way and with methods that justify suspicions of extensive conflicts of interest. The promise to deport millions of illegal immigrants has been applied in total contempt not only for the rule of law, but also for the most basic human rights. The war on Wokism is transformed into the dismantling of every form of protection for minorities even against forms of discrimination that are all too real. In the face of the forced deportation of Venezuelan immigrants recognized as innocent by the American judiciary, we see the reception by members of the Administration of white South African "refugees" who were "victims" of the regime that succeeded apartheid. Under the pretext of fighting undeniable elements of anti-Semitism that had infiltrated universities under the guise of reacting to the Gaza war, a frontal attack is underway against these institutions that represent one of the cornerstones of America's scientific progress and prosperity. Faced with the violent attacks on Harvard and other universities, one cannot help but remember the hundreds of scientists and thinkers, mostly Jewish, who in the 1930s fled the Nazi nightmare and were generously welcomed by American universities, contributing substantially to the scientific primacy of the country in the decades that followed. It is a phenomenon that has become a literary icon with the image of Albert Einstein and Kurt Gödel's evening walks along the avenues of Princeton.

The most important part of the program, entrusted to Elon Musk and his collaborators, was certainly the dismantling of the deep state, the bureaucratic monster at the service of the globalist elites. It was undertaken with extreme violence with the dismissal of thousands of officials and the closure of entire departments, such as those that presided over development aid. Many measures have been cancelled because they touched sensitive points for the security of the country itself, others by decision of the judiciary. All this confirms the elementary truth that a state structure cannot be restructured with the criteria and methods of a private enterprise. The announced savings of two trillion dollars, according to available calculations, struggle to exceed a few billion. In the international field, we can cite the wars in Ukraine and Gaza that were destined to "end in a day." Finally, customs duties were supposed to be the cornerstone of the new economic policy, intended not only to bring back to America the manufacturing treacherously stolen by competitors, but also to feed the federal budget by allowing substantial reductions in other taxes. After the resounding announcements of April 2 designated "liberation day", a harsh but predictable reaction from the markets and the limited willingness of potential victims to bow their heads were enough to trigger a process that was partly autonomous and partly negotiated, but constantly downward. What determined all this?

## **From apocalypse to chaos?**

This state of affairs depends in part on the people who were entrusted with the execution of the program. Trump understandably wanted to avoid repeating the experience of his first term and surrounded himself with people who were certainly "loyal". However, they are often largely

incompetent or are bearers of interpretations of the supposed doctrine of the leader, which are incompatible with each other. But the main person responsible is the US President himself. Trump has always theorized that unpredictability of behavior is an effective tool for dissuasion and negotiation. He is not the only one to think so. However, it is proven that the tool can be effective only if the objectives are clear. In Trump's case, it is precisely the objectives that have become uncertain and at times incomprehensible. If the rhetoric remains the same, the practical application of the program is characterized by a constant denial in the facts of the objectives pursued in words.

The emblematic case is that of customs duties. If there was one certainty, it was around the belief that tariffs were for Trump a central instrument of his economic and industrial policy. The contradictory way in which they have been used so far leaves great uncertainty over their use from a commercial, industrial and even fiscal point of view. This has resulted in the hardening of the interlocutors and a strong nervousness of the markets. We are now witnessing a series of negotiations with various countries, from the United Kingdom, to China, and others. The result seems to follow a constant pattern: a substantial reduction in the threatened tariffs, but which nevertheless does not close the matter. What is presented as an agreement is nothing more than a process always open to new requests and new concessions. The provisional balance that can be drawn is that the situation that is being created will only allow a small measure of the lost manufacturing to be brought back to America. Even if the agreements announced help to calm the markets, they will be unable to compensate for the damage done to the rules that should govern international trade. The level of protectionism between America and the rest of the world is set to remain higher than before Trump's new mandate. There is a risk that a complex network of bilateral agreements, often contradictory, will emerge that will contribute to making the international rules that have survived so far inapplicable. As a result, uncertainties and trade conflicts will increase. From an industrial point of view, they also have the effect of consecrating the disorder that has been created in the value chain of many products and technologies, with inevitable negative effects for the American economy but also for the rest of the world. From an economic point of view, the effects of protectionism are added to the already worrying state of the American public debt that risks worsening further if the Republican-majority Congress approves the "big beautiful bill", thus keeping the electoral promise of a substantial reduction in the tax burden. Besides the uncertainty about the future of trade there is also a weakening confidence in American treasury bonds and therefore in the dollar - another element of disorder that the world does not need at the moment.

In light of the concrete management of various international challenges from Ukraine to the Middle East, even the prospect of a "global Yalta" appears to be a baseless rationalization. What analysts of the apocalypse describe as a return to Carl Schmitt's friend/enemy syndrome is perhaps nothing more than a commercial negotiation for Trump. The impression one gets is that Trump intends to use America's great power primarily to act as a mediator in conflicts whose reasons he is essentially indifferent to. The consequence is that the objectives pursued can easily change during the process, as we see in the case of Ukraine but also in the Middle East. The real purpose is in fact to reach rapid partial agreements in the interest of the image, but above all the financial and commercial benefit, of the mediator himself. This approach to international relations is well illustrated by Trump's speech in Riyadh, but also by his comments after the recent phone call with Putin about Ukraine. The decision to entrust the most important negotiations to Steve Witkoff, another real estate broker who has been his friend for a long time, is emblematic from this point of view. The problem is that the interlocutors are not commercial entities, but geopolitical ones, and are moved by a complex set of emotions, interests and values, or by tragic historical memories. A foreign policy totally disconnected from the values that a nation believes it embodies necessarily produces uncertainty and disorder.



The conclusion of all this seems to be that Trump has no real strategy, but at most a method. The prospect of apocalypse is replaced by the reality of chaos. For what it's worth, according to a recent poll, two-thirds of Americans believe that "chaotic" is the appropriate definition of their President's second term. No sane person would want to choose between these two prospects. The difference is probably that apocalypse presupposes a final destination, while chaos is a process that is difficult to govern but by definition open.

## **Where are the antibodies?**

Even those who reject the parallel between Trump's America and the Europe of the 1930s must still ask themselves a question. Democracy is always fragile and at this moment more so than in the recent past. It is always good to keep in mind Plato's sinister and not disinterested prophecy according to which an innate tendency of democracy is to voluntarily deliver itself into the hands of the tyrant. In the face of the events we are witnessing, it is not very important to ask whether Trump is guided by a completely subversive plan as one might deduce from some of his inspirers, or whether his is only a contempt for rules, one aimed at the opportunistic achievement of specific objectives. The question that must be asked, therefore, is: how strong are the antibodies present in the American system? There are essentially three of them set up by America's founding fathers, who were well aware of Plato's prophecy: the federal system, the judicial system that culminates in the Supreme Court, Congress and its substantial powers. The barrier set up by the prerogatives of the States is powerful but, unless it wants to lead to a new civil war, it can only work with the contribution of the other two. At the moment the most vigorous reaction to the excesses of Trump's policy has come from the judicial system, including some judges appointed by the Republicans. However, the Administration's response has been to largely ignore its deliberations, counting, on the one hand, on the length and complexity of the procedures and, on the other, on the fact that the most relevant cases will inevitably end up before the Supreme Court, which includes a solid conservative majority. The Court's initial reactions are at best ambivalent. It will obviously be necessary to wait for the most significant cases and that will take time. The real test would be the president's eventual decision to disregard an unequivocal decision of the Court. Aside from an episode that was quickly retracted and dates back two centuries to the era of President Andrew Jackson, a figure admired by Trump, this would constitute an absolute novelty and a serious breach of the constitutional balance.

In the end, however, the real counterbalance to the President's abuse of power is Congress. Therefore, in the current situation it depends on the slim majority of elected Republicans. So far, they have been substantially compliant except for a few sporadic displays of discontent and isolated defections, never capable of endangering the albeit slim Republican majority. This compliance has also worked in the case of the endorsement of numerous patently inadequate nominations, or the clear encroachment on the powers of Congress in matters of trade. Recently, a clearer will to take the initiative seems to be emerging regarding Ukraine, which also coincides with the perception of a more critical attitude of Trump towards Russia. At first glance, this seems to enshrine Trump's total control of the party, supported by the threat of opposing potential rebels with "loyal" candidates supported by significant financial resources during the next primaries. In essence, for many of these potential rebels, the real deadline is the midterm elections, that is, in less than two years with the primary season that will actually begin next winter.



It is reasonable to think that their behavior will depend on the mood of the electorate, especially in the most sensitive states and constituencies. The data tells us that Trump's popularity index is sharply declining, but the signals regarding the Republican electorate in sensitive constituencies are ambiguous. On the one hand, the concrete measures that have been taken are often considered excessive or clearly wrong. On the other hand, even many dissatisfied voters show no signs of desertion and admit that "at least something is being done." The evolution of the electorate and therefore of the signals that it will transmit to the candidates in the coming months will depend on the concrete situation, economic first of all, but also international. However, it will also depend on whether or not there is a credible alternative. One of the laws of politics is that a party subjected to a stinging defeat goes through a period of existential crisis before regaining strength and credibility. This is certainly the case at this time with the Democratic Party. It would be foolish and presumptuous to make predictions in this regard. The conclusion to be drawn is therefore of great uncertainty on the evolution of Congress and therefore on the possible internal constraints on Trump's policy. This does not prevent us from hoping that American democracy will return to function as the founding fathers had wisely designed it. Obviously on condition of accepting that it will still be imperfect, as are our European democracies.

## **Where is Europe in all this?**

The rest of the world, allies as well as adversaries, therefore finds itself facing the prospect of an international system substantially devoid of rules, without a true hegemon and with an unpredictable America that nevertheless remains the main world power. One might think that this constitutes a great opportunity for the "revisionist" powers. This is less true than it seems because in reality they, from Russia to China, up to the nebulous one constituted by the "global South", converge on the desire to modify the "Western order" to their advantage, but at least for the moment they do not seem able to indicate a credible alternative.

Europe will therefore have to navigate the chaos in a particularly difficult situation because it is an integral part of that order whose demise many, starting with Trump, have decreed. In other words, Europe is the opposite of a revisionist power; instead, it is primarily interested in stability, in preventing the current chaos from turning into an economic crisis or, worse, a generalized war. Like it or not, its fate is in many ways tied to that of its American ally, an ally that, moreover, is particularly hostile to Europe, if only to Europe as a unitary structure. The issue goes far beyond any trade conflicts, but involves questions that are at the basis of the transatlantic relationship and that can be defined as existential. Two obvious examples are the validity of Article 5 of the NATO Treaty and the credibility of the American atomic umbrella.

The first problem that arises is that of a potential contagion of the illiberal elements of Trumpism to the detriment of Europe's democracy. The obvious sympathy of important exponents and in some cases of Trump himself for European populists, including some clearly subversive fringes, constitutes a warning signal that should not be underestimated. A contagion extending beyond existing cases such as Hungary would constitute a formidable obstacle to the development of a coherent European policy. This is not the place to attempt an analysis of a phenomenon as complex and diversified as European populism. For our purposes, it will suffice to note the substantial difference between the conditions in which the phenomenon develops in the two western and eastern parts of Europe. In the east, where the institutions of liberal democracy are recent, still in the process of consolidation and where there is widespread dissatisfaction with the post-communist ruling class, the populist danger is inevitably more

alive and current. In the west, instead, the problems of a mature democracy emerge with motivations and fractures more similar to those we observe in America. This distinction also has a strong effect on the prospects of contagion by Trumpism. They seem all in all poor in the western part, as demonstrated by the elections in Germany and, in similar contexts, in Canada and Australia. The similarity concerns, more than the attitude towards Trump, the sharing of some themes that have animated his campaign: immigration, tax pressure, excessive rules, bureaucracy. However, in Europe there is a broad adherence to the idea of a very inclusive, albeit expensive, welfare state, which constitutes a strong obstacle to the attractiveness of Trumpism. If liberal democracy degenerates in the western part of Europe, it will be due to internal dynamics. In the east, however, where the appeal of Trump is combined with the aversion towards "Brussels Europe", external Russian and American influences can have a greater influence. Hungary is a clear example, but the fluctuating scenarios in Poland, Romania and elsewhere are also instructive. All this shows that the integration of the two parts of the continent long separated by the Cold War remains an objective not yet fully achieved.

This increases the dangers of division and makes the adoption of a common strategy even more urgent. Some suggest that Europe should take up the flag abandoned by its ally and become a promoter, with an eye especially on the "global South", of the construction of a new world order based on rules and multilateralism. It would be a noble ambition, but unfortunately the conditions for it do not exist. Europe has neither the strength nor the credibility to become "the next shining city upon a hill". In truth, it is not even certain that a hill suitable for the purpose exists at the moment. In the current difficult context, wisdom should push Europeans not to abandon the long-term goal of reconstituting a multilateral order. Before setting itself the goal of uniting humanity, Europe must, however, demonstrate that it is capable of uniting itself. What we need today is our own version of "Europe first", internally and internationally.

Everything that Europe decides to do will, however, be conditioned by the "American problem". If the analysis carried out so far makes sense, the European strategy will have to fit into a perspective of chaos and ongoing uncertainty. One fact that emerges from the polls and distinguishes the current situation from all previous periods of difficulty in transatlantic relations is the visible increase in anti-American sentiment in large sectors of European public opinion. This is an unprecedented phenomenon because it goes beyond the traditional sectors of the far left and the remnants of Gaullism. It also contrasts with a persistent and still majority pro-European attitude in the American electorate. We know how changeable these phenomena can be, but in the case of European opinion the situation risks being long-lasting. Trumpism has led to at least a partial breakdown in the relationship of trust that had characterized transatlantic relations in recent decades. It is a trust that will not be easily restored.

Everyone now agrees on the need for greater "strategic autonomy" with respect to the US, but they disagree on the meaning to give to these words. For some, autonomy is a priority objective in itself; the change in American policy is seen as an opportunity to end a relationship experienced as dependence and submission. Therefore, it is an objective to be pursued even at the cost of weakening the European position in the short term, for example in support of Ukraine or from an economic point of view. It is no coincidence that these people are often followers of the apocalyptic interpretation of Trump's policy. Although influential, they constitute a minority. The majority of Europeans are aware that a strategy that would take America's abandonment for granted and therefore pursue our systematic loosening of transatlantic ties would be counterproductive and in many cases impossible. This same majority instead wants to navigate the chaos by defending its own interests, but with the aim of preserving as much as possible the unity of the West. It is a vision that requires some delicate choices, for example in the

degree of priority to be given to European production in the rearmament process, or in the strategy and rules to be applied to digital platforms and artificial intelligence.

Having said this and contrary to what some claim, what Europe lacks is not a strategy. Last year, even before Trump's victory, the European debate was enriched by a certain number of important texts. Before the European elections, the institutions had commissioned three reports on the European market, on the competitiveness of the economy and on common defense and security, respectively from Enrico Letta, Mario Draghi and former Finnish President Niinistö. These three contributions are largely convergent in their analysis and proposals. They followed up on various "strategic compasses" developed by the Commission and presented to the European Council. All the elements for a coherent conceptual response to the challenges of the moment are therefore on the table. Without discussing their merits, these are the salient points:

- A program to restore momentum, dynamism and innovation capacity to the European economy, in particular by completing market integration and reviewing the relationship between competitiveness and the commitment to climate transition.
- A response to Trump's trade challenge, robust but open to negotiation.
- Coordination with America's other allies facing similar problems to ours: Canada, Japan, Australia, Korea and others. Above all, the desire to turn the page in relations with Great Britain after the trauma of Brexit. Giving substance to the prospect of EU enlargement to Ukraine and the Western Balkans. Added to this is a review of relations with China and an intensification of trade agreements with Latin American and Indo-Pacific countries. A new strategy towards Africa.
- Finally, the resumption, starting from the need to support Ukraine's sovereignty and counter new threats from Russia, of the collective effort to strengthen rearmament and the credibility of Europe's defense using NATO structures as much as possible.

This is not the place to evaluate each individual element of the strategy and its implications. It will suffice to note that the points gather a general consensus of the majority of EU member states, including the largest ones. Yet, this generic political consensus is contrasted by a slowness in concrete decisions and a widespread pessimism on the part of public opinion, including the business community. It is as if everyone were aware of "what" needs to be done, but doubted the "how" and above all the ability of governments and institutions to face the challenge. Yet, the pressure of the problems is evident; this is what, for example, pushes Mario Draghi to increase his appeals for urgency, as he has recently done in Portugal. The reasons for this pessimism are various but linked to each other. The first is a general weakness of governments, besieged to varying degrees by populist forces and which must face electorates traumatized by the pandemic and crossed by fractures not dissimilar to those of American society, even if different in intensity and geographical distribution. This makes it more difficult to ensure the degree of mutual trust that is necessary to allow for the sharing of sovereignty, financial but not only, which serves to consolidate unity.

Added to this is an institutional system that is not functional to the challenges of the moment, which for many important cases requires unanimity, but for which the conditions for the desired change do not currently exist. The issue is aggravated by the fact that for some crucial challenges such as the defense of Ukraine and the response to the Russian threat, unanimity of consensus may require compromises that take away credibility from common action or are in any case impossible. In these cases, the only possible response is forms of intergovernmental action, outside or on the margins of the treaties,

between so-called "willing" countries. Europe is therefore condemned to translate its strategy into a series of multilevel actions, using existing institutions and rules where possible, but inventing new formulas when necessary. Europe must have as its main imperative that of visible results, since only they can counter widespread pessimism and reawaken the confidence that is lacking. In essence, Europe must take up the teaching of Jean Monnet, according to which a strategy is nothing more than a series of concrete steps, each one destined to strengthen the consensus and therefore the conditions to make the subsequent ones possible.