Trump's Return and the Challenge to European Unity

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Donald Trump is once again reconfiguring Europe's strategic outlook.

While his previous term provided ample clues about his priorities, including "America First" and a transactional view of alliances, his reelection brings renewed uncertainties.

Trump's approach to diplomacy has been both volatile and consistent. His headline-grabbing statements shift the negotiating terrain before talks begin. Yet his overarching principles remain stable: prioritize American interests, pressure allies to pay, and support unilateral actions when politically beneficial.

Perhaps the most potent challenge Trump poses for the EU is his willingness to validate populists. In countries such as Hungary, Trump's open questioning of liberal democratic norms offers international cover for illiberal leaders. His dismissal of multilateral frameworks dovetails with Prime Minister Viktor Orbán's own skepticism of Brussels and fosters the perception that Hungary's semi-authoritarian path is consistent with global trends.

Slovakia provides a further cautionary tale. Under Robert Fico's leadership, the government has questioned the country's pro-West orientation and tightened controls on the media. With Trump's administration framing many international relationships as purely transactional, some European governments may find it easier to shrug off EU norms and pivot to more nationalistic stances.

Trump's circle has offered vocal support for far-right parties across Europe, including Alternative for Germany (AfD). This willingness to meddle in Europe's internal politics threatens to weaken the EU from within. Combined with the rise of populist parties in the Netherlands, Austria, France, and Germany, Trump's return to the international stage adds fuel to the fragmentation of the European political landscape.

In the economic realm, Europe stands at a critical juncture. Trump's protectionist trade agenda was a defining characteristic of his first term, and it shows no signs of abating. He's pledged to impose a 60 percent tariff on imports from China and up to 20 percent tariffs on European goods. The logic behind these tariffs is straightforward from Trump's perspective: create leverage that compels trading partners to buy more American products—particularly U.S. energy exports—while reducing trade imbalances.

Such a strategy represents a serious threat to EU unity. Trump's preference for bilateral arrangements over large, multilateral trade deals incentivizes member states to break ranks and seek direct agreements with the United States. Even the mere possibility of punitive tariffs could prompt countries with large trade surpluses—Germany, the Netherlands, and Ireland among them—to seek side deals to protect their exporters. This divide-and-conquer dynamic undercuts the EU's carefully cultivated single market and weakens its bargaining position.

Central and Eastern European economies—such as the Czech Republic, Slovakia, and Hungary—that rely heavily on automotive exports could also face significant repercussions if Trump follows through on his threat to raise tariffs on foreign cars. Because these nations are highly integrated into German-led automotive supply chains, a blow to Germany's auto sector would reverberate through the region. Pursuing advantageous bilateral ties with Washington may offer short-term relief for a few of the EU's largest members, but it also risks undermining the collective strength of the single market.

On energy, the Trump administration is poised to revive its quest for "energy dominance." In practical terms, that means boosting fossil fuel production and rewinding environmental regulations that impede the oil and gas industry. The United States is already the world's largest exporter of natural gas and top oil producer, but expected executive orders to expedite Liquefied Natural Gas (LNG) export permits and roll back methane regulations in Trump's first days will renew the push to flood global markets with U.S. energy.

For Europe—already turning to U.S. LNG and oil to compensate for reduced Russian supplies—increased American energy exports bring advantages but also introduce significant challenges. While the market ultimately decides which new projects will proceed, Europe's capacity to efficiently accommodate additional U.S. imports is constrained by existing infrastructure. Meanwhile, the potential use of tariffs as a coercive tool further complicates matters, potentially undermining the EU's broader climate agenda and fueling internal debates on how best to reconcile energy security with environmental goals.

Trump's second term could see the United States retreat from international climate commitments. While a wholesale rollback of renewable energy support is improbable, even modest cutbacks would narrow opportunities for U.S.-EU collaboration on environmental initiatives. A withdrawal from the Paris Agreement would not only jeopardize the EU's ambitious climate targets but also erode broader global momentum on decarbonization.

NATO remains a cornerstone of European defense, but Trump's complaints that EU members don't pay enough for their own security will have to be addressed. More broadly, if Trump uses military aid or NATO commitments as negotiating chips to elicit concessions on trade or energy, Europe's internal divisions could

widen. Such fractures would undermine the EU's collective influence and raise doubts about the reliability of its security commitments.

Trump's second term will likely amplify many of the trends seen during his first: demands for higher European defense spending, an emphasis on transactional diplomacy, and a willingness to exploit economic and political leverage points to advance U.S. interests. The gravest danger for Europe lies in the fragmentation that could result if member states abandon common positions and instead jockey for favorable bilateral terms. Once unity is eroded, the EU becomes far more vulnerable to both external pressures and internal threats from authoritarian-leaning leaders.

European policymakers should approach Trump with a coordinated strategy. Rather than dismissing his threats as bluster, the EU should assess Trump's core demands—whether they relate to trade surpluses, defense spending, or energy purchases—and propose compromises that protect the bloc's most important interests. European capitals should resist the temptation to go it alone, recognizing that short-term bilateral benefits could lead to long-term erosion of the EU's collective strength.

Above all, Europe's best defense against Trump's "divide-and-conquer" tactics, as well as against its own homegrown challenges to democracy, remains unity of purpose. By upholding core democratic values, maintaining solidarity on critical issues like Ukraine's territorial integrity, and coordinating on trade and energy, the EU can withstand the pressures of Trump's protectionism and maintain its position as a critical pillar of the rules-based international order.

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