



Gábor Csizmazia – Viktor Eszterhai – Balázs Tárnok: The Impact of Trump 2.0 on Europe's Position in the Transforming World Order¹

Executive Summary

- Donald Trump's foreign policy sharply diverges from the strategy of the Biden administration. While the United States does not seek a rigid bloc formation similar to the Cold War era, its policies clearly reinforce great power competition, returning to a pragmatic, transactional approach. The primary objective of American foreign policy is to strengthen the country's economic and military capacities.
- The alliance systems and multilateral institutions upheld by the Biden administration may be marginalized if they do not directly serve American interests.
- The global power structure is gradually shifting towards a multipolar world order, where the United States, China, Russia, and other regional powers counterbalance each other.
- The loosening of international regulatory frameworks leads to a rise in self-interest-driven foreign policies, which may result in increased instability and conflicts worldwide.
- The European Union must adapt to the new geopolitical realities. If it seeks to establish itself as an independent pole in the transforming world order, it must simultaneously enhance its economic and defense capabilities, strengthen its strategic autonomy, and maintain its diplomatic flexibility.

The initial measures and statements of Donald Trump's presidency signal the emergence of a new American foreign policy, which stands in stark contrast to previous administrations, particularly the Biden administration. This analysis examines the key characteristics of Trump's foreign policy shift, with a special focus on comparisons with the Biden administration's approach. The objective of this paper is to explore the impact of Trump's foreign policy on the global order, with particular emphasis on the European Union's position and room for maneuver.

1. Introduction

The 2025 Munich Security Conference once again served as a sobering moment for Europe: the changes in U.S. foreign policy are producing significant shifts, not only in responses to one of the greatest challenges of recent years—the war in Ukraine—but also in the entire transatlantic partnership.² In light of these developments, the early months of the Trump administration have been marked by actions that are unusual from a European perspective and that disrupt established norms. These include the open intention to acquire Greenland, the possibility of imposing punitive tariffs on American allies, withdrawal from the Paris Climate Agreement, the suspension of WHO funding, and a drastic increase in defense spending requirements for NATO member states. These steps indicate the contours of a new American foreign policy direction—one that not only seeks to redefine the role of the United States but also reflects a novel approach to the transforming world order.

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² CSIKI VARGA, Tamás: *Biztonságpolitikai konferencia Münchenben – Tanulságok Európa számára. John Lukacs Stratégiai Védelmi Kutatási Elemzések*, 2025/7, February 17, 2025. [online, accessed February 21, 2025]



2. On the Nature of the New American Foreign Policy

Although Donald Trump's relationship with the outside world is a constant topic on the news, even experts lack consensus on the essence of Trumpian foreign policy. In academic literature, terms such as "isolationist" and "nationalist-populist" appear frequently yet their validity is debatable.³ The term "transactionalist" foreign policy seems the most fitting, though it is also the most enigmatic. On the one hand, *all* actors in international politics seek advantageous agreements, typically based on a "something for something" principle. On the other hand, in itself the desire for deals reveals nothing about why and how a given actor formulates its foreign policy objectives. Consequently, Donald Trump's foreign policy should first be examined "from below," by reviewing why and how the United States chose the Trumpian foreign policy direction and how it fits into the broader framework of American grand strategies. By 2024, American society was not only well acquainted with Trump's foreign policy ideas but they have been increasingly resonant with the views of the majority of voters.⁴

For years, the crisis of political institutions in the United States has been evident, a reality brought into spotlight by the 2024 election campaign. Regardless of the respective administrations' political affiliation, an increasing number of voters felt that the country had been heading in the wrong direction for decades.⁵ This fueled a growing anti-elite sentiment that also permeated foreign policy thinking. The once-dominant "liberal internationalist" logic faced mounting criticism, with conservative,⁶ progressive,⁷ and left-wing⁸ alternatives emerging since the late 2000s. While these alternatives differ in many respects, they share a common critique: the influence of the so-called "establishment" — comprising intellectual and economic elites — is disproportionately large and potentially harmful to American foreign policy. This discontent became visible in the political arena as well: in both 2016 and 2020, Donald Trump's nomination as the Republican presidential candidate unsettled the establishment, just as Bernie Sanders, a Democrat who challenged numerous foreign policy fundamentals, nearly secured his party's nomination on both occasions.

The leading critic of liberal foreign policy was, of course, Donald Trump. As early as 1987, he argued that maintaining certain trade partnerships and defense alliances was not beneficial for Americans,⁹ as some countries, in his view, were taking advantage of the liberal institutions established by the United States. In making this argument, Trump pinpointed a problem that international relations scholar Michael Doyle had previously identified: the liberal world order — built on democracy, international organizations, and free trade — could collapse if the United States, which militarily underpins the entire system, begins to question its hegemonic role of "global policeman" or if the system undergoes a crisis. The latter materialized in the 2008 financial recession, and it is no coincidence that thoughts of U.S. retrenchment began to emerge in its aftermath albeit in a more diplomatic guise.¹⁰ The economic downturn exposed that globalization had created domestic losers even within leading powers. In pursuit of cost efficiency, production chains had been outsourced to such an extent that certain regions of the United States suffered from structural unemployment. A symbolic moment of the 2016 election was when Hillary Clinton referred to the victims of globalization as "deplorables," a comment further encouraging many of them to vote for

³ Isolationism is a recurring theme in U.S. foreign policy; however, the United States has never truly been "isolated" from a trade perspective, only selective in choosing its political and military allies. In recent decades, Washington has been labeled "isolationist" typically by Europeans, who resent the U.S. focusing more on other regions. A similar argument can be made about the "nationalist-populist" label: the significance of national identity and majority democracy is traditionally a larger and more powerful force in European parliamentary democracies than in the American federal republic.

⁴ STOKES, Bruce: *The Role of Foreign Policy in the 2024 US Election*. *German Marshall Fund*, February 20, 2024. [online, accessed February 24, 2025]

⁵ *Direction of the United States*. *YouGov*, February 18, 2025. [online, accessed February 22, 2025]

⁶ NAU, Henry R.: *Conservative Internationalism*. *Hoover Institution*, July 30, 2008. [online, accessed February 22, 2025]

⁷ JACKSON, Van: *Left of Liberal Internationalism: Grand Strategies within Progressive Foreign Policy Thought*. *Security Studies*, 31:4 (2022) 553–592.

⁸ WALZER, Michael: *A Foreign Policy for the Left*. *Dissent*, Spring 2014, [online, accessed February 22, 2025]

⁹ CNN: *Donald Trump: "I don't want to be president" - entire 1987 CNN interview (Larry King Live)*. *YouTube*, May 10, 2016. [online, accessed February 22, 2025]

¹⁰ In 2009, Barack Obama campaigned under the slogan "change", which primarily meant that, instead of foreign military missions, Washington would focus on strengthening domestic infrastructures and social subsystems (such as access to healthcare insurance).



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Trump. Later, Joe Biden learned from this mistake and promoted a foreign policy aimed at protecting the shrinking middle class. However, despite the Biden administration's more favorable international perception, Washington had long abandoned efforts to negotiate classic free trade agreements (which focus on tariff reductions). In fact, at times, even the Democrat-controlled Congress pursued protectionist legislation.

Although the Biden administration sought to address the social and economic problems associated with globalization, its liberal and partially progressive ideological background prevented it from developing consistent policies in areas such as energy and climate policy, immigration and homeland security, and foreign policy and national security. Meanwhile, Trump solidified his dominance over the Republican Party — a feat that would have been impossible without significant social support.¹¹ One of the most controversial moments of his 2024 presidential debate with Kamala Harris was when he accused certain illegal immigrants of consuming household pets. While this rhetorical exaggeration was shocking, it achieved its intended effect: the issue of mass illegal immigration brought him votes (even among Spanish-speaking communities), and despite his controversial executive orders and statements, his presidential approval has remained stronger than ever.¹²

What distinguishes Donald Trump from both his Republican and Democratic peers is his blunt critique of the excesses of the liberal world order. A key message of the first Trump administration's 2017 National Security Strategy was that the institutions of the liberal world order — particularly certain international organizations — had become corrupt over time. The infiltration of anti-Western and anti-American actors had made it increasingly difficult, if not impossible, for the United States to assert its interests. At the time, this was primarily a viewpoint shared by hardline Republicans (including security hawks and "nationalist" or "isolationist" factions), but today, it has become widespread across the American Right. While the international community often perceives the U.S. withdrawal from various organizations as Donald Trump's personal recklessness, these decisions are, in reality, backed by growing political support. For instance, American funding for the UN Relief and Works Agency for Palestine Refugees (UNRWA) was already prohibited by an appropriations bill passed in the spring of 2024,¹³ just as it made funding for the UN Human Rights Council conditional. Trump's subsequent executive order merely reinforced these measures. Similarly, organizations such as the World Health Organization and the International Criminal Court have lost popularity among Republicans.

It is telling that in early 2025, Marco Rubio — who was preparing to become Secretary of State and had previously been considered an internationalist and a critic of Trump — declared during his Senate confirmation hearing that Francis Fukuyama's "end of history" thesis (i.e. the idea of liberal democracy's and market economy's global triumph) was not only "a fantasy" but a "dangerous delusion." Rubio, who ultimately secured unanimous Senate approval, argued that "the post-war global order is not just obsolete, it is now a weapon being used against us. [...] Eight decades later, we are once again called to create a free world out of the chaos"¹⁴ The first step in this process is destruction: Washington is ruthlessly dismantling elements of the previous order that it no longer deems useful.

¹¹ Interestingly, between 2022 and 2024, both Donald Trump and Joe Biden were attempted to be abandoned by their own party elites: the Republican leadership despised Trump, but struggled to deal with the fact that the New York businessman attracted crowds to his campaign events, with his supporters increasing after nearly every single indictment. The same could not be said for Joe Biden and Kamala Harris, who, while enjoying the support of the Democratic Party leadership, found that support to be volatile.

¹² One month after taking office, the president's approval stands at 46.5%, compared to a disapproval rating of 48.2%. Although this overall represents a negative balance, it actually surpasses the approval rating of his previous presidency and shows an improving trend over the past year and a half. [Do Americans have a favorable or unfavorable opinion of Donald Trump? *FiveThirtyEight*, February 19, 2025. \[online, accessed February 22, 2025\]](#)

¹³ [H.R.2882 - Further Consolidated Appropriations Act, 2024. *U.S. Congress*, 2024.03.23. \[online, accessed February 22, 2025\]](#)

¹⁴ RUBIO, Marco: [Opening Remarks by Secretary of State-designate Marco Rubio Before the Senate Foreign Relations Committee. *U.S. Department of State*, January 15, 2025. \[online, accessed February 22, 2025\]](#)



3. The Impact of the New U.S. Foreign Policy on the Evolving World Order

Even the Biden administration had to acknowledge that the decline of the post-Cold War liberal world order was irreversible.¹⁵ While the official U.S. rhetoric continued to emphasize the rules-based international order, in practice, both the American foreign policy elite and global actors accepted that a return to the liberal world order was impossible. This was not primarily due to a decline in U.S. capabilities but rather the growing strength of competitors—above all, China—who benefited significantly from the advantages provided by the international system established by the United States. As a result of this assessment, the Biden administration pursued a foreign policy that sought to maintain U.S. leadership by sharing the costs of competition with China among its allies. Rather than reviving the previous multilateralism, the administration focused on strengthening regional alliances and strategic partnerships, particularly in the Indo-Pacific region. The reinforcement of alliances such as AUKUS and the Quad made it clear that the primary focus of U.S. foreign policy had shifted to addressing the strategic challenge posed by China.¹⁶

Biden's foreign policy steered the world order towards increased bloc formation—a kind of new Cold War under globalization.¹⁷ However, replicating the Cold War in a globalized world would be far more costly. Moreover, the United States could no longer provide public goods to its allies to the same extent as it did during the Cold War. While the U.S. military umbrella remained relatively credible (as evidenced by the Russian-Ukrainian war), the lack of economic incentives marked a significant difference from the Cold War era, when the U.S. was simultaneously the primary market and the center of capital and technological dominance. U.S. economic strategy also took a protectionist turn: the Inflation Reduction Act and American industrial policy measures signaled that Washington was now prioritizing its own economic and technological dominance over global economic integration.¹⁸ This not only further eroded the classic elements of the liberal world order but also foreshadowed the long-term challenges of maintaining the Western unity. Overall, this period can be identified as a multipolar system, with two dominant poles primarily shaping international events. The main goal of Biden's foreign policy was to reinforce bipolarity between the U.S. and China, a relationship in which the U.S. leadership was ensured by a stable alliance system, even as it inadvertently strengthened the rapprochement between China and Russia.¹⁹

The new Trump administration's foreign policy may well represent the final nail in the coffin of the liberal world order. Withdrawal from international organizations or a reduction in support for them would call into question the legitimacy of institutions originally established by the U.S., which once ensured its global leadership. Given the current power relations, the prospects for a new order do not seem realistic, while at the same time there are concerns about issues that cannot be resolved in the absence of commonly agreed rules.

Trump's new approach to American foreign policy is not merely a continuation of his predecessor's unilateralist, America-centered direction; it is based on an imperial logic with the following key characteristics:

1. *Internal Reinforcement*: The primary goal for the U.S. is to remain stronger than any potential challenger. This approach includes industrial development and maintaining technological leadership. The strategy focuses on building internal capacities, in contrast to the Biden administration's uncertain reliance on allies to share burdens. Closely linked to this is the strategy of reshoring industries, aimed at achieving economic independence and accelerating innovation. This also involves rethinking the transatlantic trade system and reducing trade deficits with the EU and China through tariffs.

¹⁵ MARTONFFY, Balázs – NYSTRÖM, John: *Az európai védelem integrációjának kihívásai. Külügyi Szemle*, 2021/1. [online, accessed February 21, 2025]

¹⁶ BARANYI, Tamás Péter: *Az AUKUS megállapodás az „angolszász hatalmak” szempontjából. KKI Elemzések*, 2021/61. [online, accessed February 18, 2025]

¹⁷ HARDY, Alfredo Toro: *America's Two Cold Wars: From Hegemony to Decline?* Springer Nature, 2022.

¹⁸ MOUTII, Mohamed: *Green Protectionism in Disguise: The Hidden Facets of the Inflation Reduction Act. IREF Europe*, 2024.04.03. [online, accessed February 17, 2025]

¹⁹ ESZTERHAI, Viktor: *Az orosz–kínai tengely az ukrajnai háború tükrében = The Russian–Chinese Axis in the Light of the War in Ukraine. Külügyi Szemle*, 21:2 (2022), 43–66. [online, accessed February 18, 2025]



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2. *A New Approach to Alliances:* Unlike the Biden administration, the Trump administration views alliances primarily as potential resource pools to be tapped. Allies receive protection, but in return, they must support the U.S. Nothing is provided as a public good; every benefit of alliance membership has a price, including the nuclear umbrella. A clear example of this is the proposal to increase NATO member states' defense spending to 5% of GDP, effectively subsidizing the American defense industry, given the limitations of European military capacities.
3. *Pragmatic and securitized foreign policy:* American foreign policy is shifting from ideological principles to pragmatism. Since war weakens domestic capacities, the U.S. leadership avoids extensive military conflicts. Negotiation with all actors—even China—is part of this strategy, provided that a deal aligns with American interests. The introduction of drastic tariffs can cause economic turbulence, potentially jeopardizing the grand plan for America's restoration. This explains the delay in implementing the announced 60% tariffs against China. In reality, tariffs are often not just trade or industrial policy tools but are used as national security leverage. Trump frequently invokes "national emergencies," particularly along the U.S. southern border, where the proposed 25% tariffs on Mexico (and Canada) were intended as punitive measures for what the U.S. perceived as insufficient efforts to curb cross-border human and fentanyl trafficking. Thus, securitization and linkage politics become integral to this pragmatic approach: anything can be framed as a national security issue, and extraordinary measures can serve as bargaining chips across various domains.
4. *Secure and Defensible Borders:* The new geopolitical guidelines aim to establish clear spheres of influence and defensible borders, following the principles of classical geopolitical strategies. In this context, regaining control over the Panama Canal and reinforcing strategic oversight of Greenland are rational steps.

The new Trump administration's foreign policy signals the strengthening of a multipolar world order, where each great power seeks to consolidate its own sphere of influence. It openly returns to a model of competing great powers, where the principle of self-help prevails, meaning that each state prioritizes its own interests while international organizations and rules gradually lose significance. This model increases competition among global poles, heightening overall uncertainty and leading to proxy wars or smaller regional armed conflicts. While these conflicts are unlikely to involve direct clashes between major powers—given their relatively balanced military and economic capacities—their influence will be felt in geopolitical hotspots. For instance, the U.S. remains the world's leading military power, while China serves as the global manufacturing hub, making the outcome of a direct war highly uncertain. The Middle East, Africa, Latin America, and certain conflict zones in Europe will continue to serve as arenas for great-power influence and geopolitical maneuvering. Within this framework, the shift in Washington's attitude toward the war in Ukraine can also be understood, as its primary negotiating counterpart remains Russia, which, due to its nuclear capabilities, is still regarded as a global power.²⁰

On the international stage, great powers may engage in unpredictable, opportunistic agreements often lacking trust, common ideological foundations, or a stable value system. A country's bargaining position will depend primarily on its capacities and diplomatic leverage. These phenomena are not new—they have already surfaced in recent years' crises and are likely to intensify. Nevertheless, it is unlikely that the rules of a new international order will be established in the near future, meaning that fundamental global uncertainty will persist in the long run.

The most accurate historical analogy for the current world order is the period from the unification of Germany (1871) to the outbreak of World War I (1914).²¹ This period saw the emergence of an unstable

²⁰ DANAHER, Caitlin – KENNEDY, Niamh: [Zelensky warns days of guaranteed US support for Europe are over, as Kellogg says Europeans won't be at table for peace talks](#). *CMN*, 2025.02.15. [online, accessed February 21, 2025]

²¹ Others argue that the current situation is more reminiscent of the Yalta-type bipolar world order model, where federal systems functioned as effectively subordinate spheres of interest. At the same time, Russia and China are hoping for the emergence of a multipolar Yalta system, in which the great powers make deals with each other, respecting each other's fundamental interests and engaging in proxy conflicts only at the periphery of their spheres of interest. ASH, Timothy Garton: [Trump's senseless capitulation to Putin is a betrayal of Ukraine – and terrible dealmaking](#). *The Guardian*, 2025.01.13. [online, accessed February 24, 2025]



multipolar system, where the competition between two dominant poles ultimately led to global conflict. Germany, as a rising industrial power, and Britain, striving to maintain its leadership, closely parallel today's China and the United States. Whereas industrialization was the focal point of competition in the late 19th century, today's equivalent is the advancement of digitalization and artificial intelligence, domains where the U.S. and China lead. The era was characterized by an arms race and military competition, elements that remain central to today's international security dynamics.

4. The Impact of the New U.S. Foreign Policy on Transatlantic Relations

Considering these developments, it is worth examining the role that Europe might play in the evolving world order and the implications this could have for the transatlantic relationship that has defined the past few decades. The first Trump administration caught European leaders unprepared; several actions were taken that were unfamiliar to the European elite. This includes the transactional approach to foreign policy, the disregard for EU institutions and regulatory frameworks, and the open support for Brexit. Although the Biden administration also placed significant emphasis on advancing U.S. interests in transatlantic relations (e.g., the Inflation Reduction Act),²² it was done within a completely different political communication framework, one that European politicians found easier to convey to their constituents. In contrast, Donald Trump's statements quickly entered European discourse at the level of EU citizens, which may influence the political stances of individual member states. The EU leadership faces a dual challenge: it must maintain transatlantic relations while also protecting its own economic and security interests.

The development of transatlantic relations is examined along two fundamental dimensions, which traditionally define the American-European relationship. The first is economic cooperation and the trade relations between the two blocs, particularly with regard to tariffs and the evolution of the trade balance. The second dimension is geopolitical and security cooperation, especially concerning European security issues, the possible resolution of the Russo-Ukrainian War, and Europe's place and role in the evolving world order.

4.1. Economic Cooperation – A Tariff War with Europe?

With his first actions, Trump did not impose tariffs on the European Union, but he made his intentions clear, asserting that the EU takes advantage of trade with the U.S. and generates a huge trade surplus.²³ Despite the shared interest in maintaining high-level economic and trade relations between the two blocs, Trump threatened to impose tariffs on goods imported from the EU,²⁴ even though a tariff war within the alliance could have several negative consequences for the American economy. The President seeks to use tariffs as a lever to encourage European partners to buy more American products, particularly energy resources.

However, it remains uncertain whether Trump will actually carry out his tariff threats against the EU or if they are simply a negotiation tactic. During his previous term, Trump had already imposed a 25% tariff on EU steel and a 10% tariff on aluminum, to which the EU responded with countermeasures.²⁵ Although Trump frequently used tariff threats to strengthen his negotiation position, the issue on the table in the negotiations is likely not whether the U.S. will impose tariffs on the EU, but rather what the extent and scope of these tariffs will be. Ursula von der Leyen, President of the European Commission, stated that the EU will take "firm and proportionate" response if the U.S. imposes unfair tariffs.²⁶ In an escalating

²² Congressional Research Service: [Inflation Reduction Act of 2022 \(IRA\): Provisions Related to Climate Change](#). *CRS Report*, R47262, October 26, 2023. [online, accessed February 19, 2025]

²³ STARCEVIC, Seb – RUHIYYIH EWING, Giselle: [Trump vows to launch trade war on EU](#). *Politico.eu*, February 1, 2025. [online, accessed February 19, 2025]

²⁴ In 2023, the EU exported goods worth 576.3 billion dollars to the USA, accounting for nearly 20 percent of EU exports. [Trade in Goods with European Union](#). *United States Census Bureau*. [online, accessed February 19, 2025]

²⁵ HANKE VELA, Jakob – VON DER BURCHARD, Hans: [EU seeks to hit back at €3 billion of US exports from bourbon to jeans](#). *Politico.eu*, March 2, 2018. [online, accessed February 19, 2025]

²⁶ VERHELST, Koen: [EU vows 'firm and proportionate' response to Trump's tariffs](#). *Politico.eu*, February 11, 2025. [online, accessed February 19, 2025]



tariff war, the U.S. also has something to lose. While the EU's trade deficit with the U.S. has exceeded \$200 billion annually since 2021,²⁷ there is a significant American trade surplus in the services market, which could be negatively impacted by European measures.

Another key goal for Trump is to significantly increase Europe's import of American energy resources, thereby improving the trade balance.²⁸ In 2023, the EU purchased \$90 billion worth of U.S. LNG and crude oil, and under Trump's expectations, this amount would need to increase by an additional \$130 billion.²⁹ However, this would entail considerable energy dependency for the EU, which is striving for energy diversification. The American expectations, therefore, are constrained by European interests in this regard.

Moreover, EU regulations could hinder this process: from 2027, for example, the EU will introduce penalties on fuels with high methane emissions,³⁰ and from 2026, it will impose tariffs on carbon-intensive imported products, which may also affect U.S. exports.³¹

Trump is expected to prioritize bilateral economic relations with individual EU member states over EU institutions, as he did during his first term. However, it is important to note that within the EU, the common trade policy is an exclusive EU competence, leaving member states with limited room to engage in individual negotiations over tariffs.

4.2. Geopolitics and Security Policy

A key element of the new U.S. foreign policy is the recognition that the U.S. cannot maintain its leading position indefinitely, and that allies will need to take on an increasingly larger role in bearing the costs of maintaining their own security. This is especially true for European security policy. In this context, Trump's demand for NATO members to spend at least 5% of their national GDP on defense becomes relevant.

However, for Europe, increasing defense spending is not just an American demand but increasingly an internal necessity. After enjoying the "peace dividend" for thirty years,³² Europe's military vulnerability has become evident, particularly in light of the Russo-Ukrainian War. While U.S. security guarantees remain crucial, the European political elite must confront the reality that these guarantees cannot be provided indefinitely. One of the key elements in the security and defense dimension of transatlantic cooperation is U.S. planning for the resolution of the Russo-Ukrainian War and the subsequent development of a new security architecture. For the U.S., the war presents not only a geopolitical challenge but also an opportunity to assert its newly defined strategic interests.

In the new U.S. administration's interpretation, the war entails unnecessary costs for the U.S. However, the American approach may not be fully aligned with European and Ukrainian interests. While Trump had previously signaled a willingness to negotiate with Vladimir Putin, the American administration remains skeptical about Ukraine's objectives, particularly concerning the recapture of territories under Russian occupation and NATO membership. According to U.S. Defense Secretary Pete Hegseth, these goals are unrealistic.³³ In contrast, the EU and its member states strongly support Ukraine's territorial integrity, which, according to EU foreign affairs and security policy chief, Kaja Kallas, are unconditional.³⁴

Trump's transactional approach is reflected in his February statement that, in exchange for continued American war support, the U.S. should receive a share of Ukraine's natural resources, particularly its rare

²⁷ MÁTHÉ, Réka Zsuzsánna: *Olajat és gázt a kereskedelmi deficitért.* *Ludovika.hu*, February 1, 2025. [online, 2025.02.19.]

²⁸ GAVIN, Gabriel – LEFEBVRE, Ben: *The EU rules that risk derailing a gas deal with Trump.* *Politico.eu*, January 23, 2025. [online, accessed February 19, 2025]

²⁹ MÁTHÉ, Réka Zsuzsánna: *Olajat és gázt a kereskedelmi deficitért.* *Ludovika.hu*, February 1, 2025. [online, accessed February 19, 2025]

³⁰ Regulation (EU) 2024/1787 of the European Parliament and of the Council of 13 June 2024 on the reduction of methane emissions in the energy sector and amending Regulation (EU) 2019/942. OJ L, 2024/1787, July 15, 2024. [online, accessed February 19, 2025]

³¹ European Commission: *Carbon Border Adjustment Mechanism.* *EC.Europa.eu*, January 17, 2025. [online, accessed February 19, 2025]

³² CSIKI VARGA Tamás: *Trump és a NATO: Mire lenne elég a GDP 5%-át kitevő védelmi költségvetés?* *John Lukacs Stratégiai Védelmi Kutatási Elemzések*, 2025/3, January 28, 2025. [online, accessed February 20, 2025]

³³ ROSS, TIM et al: *Trump and Putin stun Europe with peace plan for Ukraine.* *Politico.eu*, February 12, 2025. [online, accessed February 20, 2025]

³⁴ KALLAS, Kaja: *Ukraine's independence and territorial integrity are unconditional. X.com*, February 12, 2025. [online, accessed February 20, 2025]



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earth materials.³⁵ Ukraine possesses vast reserves of critical minerals such as lithium and titanium, which are indispensable for modern technologies, although some of these are currently under Russian control. U.S. policy indicates that the U.S. is focused on a swift conclusion to the war with clear, communicable benefits, paying less attention to the interests of its European allies.

The resolution of the Russo-Ukrainian War and the establishment of a new European security architecture—particularly in light of the decade and a half-long trend of the U.S. reducing its military presence in Europe to lower its costs—are closely intertwined issues. European states have provided significant support to Ukraine over the past three years, with European financial aid exceeding U.S. contributions.³⁶ Consequently, Europe insists on playing an active role in the resolution of the war. In contrast, Keith Kellogg announced at the Munich Security Conference that, according to U.S. plans, Europe will not be involved in the peace talks to resolve the Russo-Ukrainian War.³⁷ This announcement shocked European leaders. In response, French President Emmanuel Macron called for an emergency summit in Paris to formulate common responses to the new situation.³⁸ Meanwhile, the first U.S.-Russia negotiations on ending the war took place in Saudi Arabia—without Ukraine's participation for the time being (the primary aim of the meeting was to restore contact between the U.S. and Russia, and the parties discussed several issues beyond the potential settlement of the Russia-Ukraine war).³⁹

This is particularly ominous for the EU's ambition to play a central role in any peace negotiations. The American efforts to resolve the Russo-Ukrainian War may not only determine the war's outcome but also fundamentally shape the future of transatlantic relations.⁴⁰ The extent to which the U.S. involves Europe in decision-making may also provide an answer to whether U.S. foreign policy will shift towards sphere-of-influence politics or if it will find a new way to reinforce transatlantic cooperation.

5. Conclusions

Under the leadership of Donald Trump, the United States is striving to reshape the world order, ruthlessly dismantling elements that have become disadvantageous. The new U.S. foreign policy fundamentally affects transatlantic relations, with particular focus on European security. Europe must take on a greater role in its own defense, compensating for decades of neglect. However, a scenario can also be inferred from the actions of the American president, in which Trump seeks to fundamentally reshape the transatlantic (and Western) alliance; in place of the previous partnership approach, a sphere-of-influence-based model would emerge, within which the United States would unapologetically assert its own interests, even against European interests.

For the United States, China represents the primary competitor, and the new world order must be designed in such a way as to counterbalance China's rise and prevent the Asian power from undermining American dominance. However, this does not entail a bloc-like division similar to the Cold War, but rather a dynamic relationship with great powers. Donald Trump may reconsider his stance on Russia, potentially basing it on the view—debatable from several perspectives—that the Americans could separate the Russians from the Chinese. The Obama administration also attempted to reset relations with Russia, and now Donald Trump may be trying to do the same. There could be multiple benefits for the United States in this, including reducing the maneuvering space of states like Iran, cooperating in Arctic oil extraction,

³⁵ SHEFTALOVICH, Zoya – MELKOZEROVA, Veronika – DETTMER, Jamie: [Ukraine reels in Trump with mineral riches](#). *Politico.eu*, February 4, 2025. [online, accessed February 20, 2025]

³⁶ TREBESCH, Christoph: [Ukraine support after 3 years of war: Aid flows remain low but steady - Shift towards weapons procurement](#). *Kiel Institute for the World Economy*, February 14, 2025. [online, accessed February 20, 2025]

³⁷ DANAHER, Caitlin – KENNEDY, Niamh: [Zelensky warns days of guaranteed US support for Europe are over, as Kellogg says Europeans won't be at table for peace talks](#). *CMN*, February 15, 2025. [online, accessed February 20, 2025]

³⁸ LIBOREIRO, Jorge: [Macron hosts European leaders in Paris as Trump pushes for peace talks on Ukraine](#). *Euronews.com*, February 17, 2025. [online, accessed February 20, 2025]

³⁹ LEE, Matthew – ISACHENKOV, Vladimir: [A deeper look at the talks between US and Russian officials as Trump suggests Ukraine is to blame](#). *APNews.com*, February 19, 2025. [online, accessed February 20, 2025]

⁴⁰ BERGMANN, Max: [The Transatlantic Alliance in the Age of Trump: The Coming Collisions](#). *Center for Strategic and International Studies*, February 14, 2025. [online, accessed February 24, 2025]



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and revitalizing economic ties. Trump's sharp criticism of the Ukrainian leadership regarding the legitimacy of the Ukrainian president could be interpreted as a sign of approaching Russia.⁴¹

Since taking office, Donald Trump's actions and statements have also been interpreted as efforts to undermine European unity to more effectively assert his sphere-of-influence politics across the continent. One element of this strategy might involve exploiting bilateral relations to weaken EU unity through offers made to member states. Another arena for dissolving European unity is identity politics, as exemplified by Vice President JD Vance's speech at the Munich Security Conference, where he sharply criticized European identity elements such as regulations on freedom of speech and the calls for European leaders to change their relations with far-right political forces.⁴²

How might Europe, and specifically the European Union, respond to the appearance of sphere-of-influence politics and potential American actions detrimental to European interests? A key issue will be how the continent reacts to resolving the Russian-Ukrainian conflict, whether it is willing to continue its foreign policy even if American foreign policy takes a different direction in the coming weeks than previously anticipated. The European Union continues to aim at becoming an independent pole in the transforming world order. To achieve this, it must simultaneously increase its economic and defense capacities, strengthen its strategic autonomy, and preserve its diplomatic maneuvering space. The development of defense capabilities should be carried out by member states but with European-level coordination, consciously aiming to ensure that future expenditures will address existing shortcomings. Within the NATO framework, this will entail a greater European voice but also a greater responsibility. Furthermore, it is essential to reconsider the strategy of nuclear deterrence, which could contribute to achieving greater autonomy and reducing coercive potential. The EU's maneuvering space could be further expanded if pragmatism takes a larger role in its foreign policy. Key to this could be improving relations with China and strengthening ties with the Global South. In the event of direct harm to its interests, the European economy could take significant countermeasures. However, this would require raising awareness about the political use of economic tools and effectively mapping and exploiting America's economic weaknesses (such as its debt and excessive dependence on the service sector). It is a flawed strategy to pursue goals that merely serve Washington's expectations. Instead, Europe must demonstrate strength to secure a more favorable negotiating position.

The steps outlined above are, of course, not aimed at dismantling transatlantic relations, but at effectively adapting to the transforming international environment and increasing Europe's self-defense capabilities and maneuvering space. Moreover, loosening the transatlantic bond would be a step that breaks with decades of tradition, weakening the entire Western alliance and all of its members. For this reason, Trump's policy of "keeping Europe down" could face opposition from his domestic base, too.

⁴¹ POMEROY, Gabriela – WRIGHT, George: [Trump calls Zelensky a 'dictator' as rift between two leaders deepens](#). *BBC.com*, February 20, 2025. [online, accessed February 21, 2025]

⁴² [Vice President JD Vance Delivers Remarks at the Munich Security Conference](#). *YouTube.com*, February 14, 2025. [online, accessed February 21, 2025]



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The *John Lukacs Analyses on Global Affairs* discusses the most important issues related to the transformation of the global political and economic order. The series aims to contribute to the discourse on the changing world order through scientifically rigorous analyses and to shed light on the dynamics of international relations. The analyses examine great power competition, the transformation of global political structures, and the foreign policies of key actors shaping the 21st-century geopolitical landscape.

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