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The Transatlantic Relationship in a Time of Strategic Recalibration: From Structural Allies to Conditional Partnership?

Policy Recommendations

1. The EU should establish binding and measurable benchmarks for joint defence procurement, including common procurement targets and coordinated capability planning, and integrate them directly into EU defence planning. Accelerating the European Defence Industrial Strategy and prioritising the closure of critical capability gaps – including air defence, ammunition production, and logistics – by 2030 remains essential. These efforts should continue in close cooperation with NATO to ensure coherence in broader transatlantic security.
2. Regarding Ukraine, the European Council should develop a coordinated framework for long-term security guarantees, reconstruction financing, and sanctions policy. At the same time, all measures should be operationalised through existing EU diplomatic structures to ensure effective coordination and maintain support for Ukraine's sovereignty and long-term stability.
3. The EU should deepen defence-industrial cooperation and secure supply chains through structured partnerships with middle-power democracies such as the United Kingdom, Japan, Australia, South Korea, and Canada. These partnerships should complement, not replace, transatlantic security structures and help mitigate risks stemming from potential US policy shifts.

Abstract

The transatlantic relationship is undergoing a structural transformation from value-based alignment to increasingly interest-driven and conditional cooperation. Recent shifts in US foreign policy, Europe's marginalisation in key Ukraine-related diplomatic formats, and growing ideological frictions – highlighted at the 2025–2026 Munich Security Conferences – suggest not merely episodic tensions, but a deeper recalibration of strategic priorities. By 2026, this recalibration has evolved into a more institutionalised pattern of conditional cooperation, where alli-

ance continuity persists but strategic alignment is increasingly fragmented. The European Union faces a fundamental choice: continue relying on fluctuating US commitments or gradually strengthen Europe's strategic capacity and defence readiness while preserving transatlantic security cooperation. This Policy Brief argues that continued strategic ambiguity carries growing geopolitical risks and outlines concrete pathways to enhance Europe's defence capacity, diplomatic coherence, and strategic diversification without undermining transatlantic stability.



The Transatlantic Relationship in a Time of Strategic Recalibration: From Structural Allies to Conditional Partnership?

From Liberal Convergence to Strategic Recalibration

In today's fast-changing geopolitical environment, alliances are increasingly formed for economic, political, and narrowly defined national interests rather than ideological convergence. Following the collapse of the Soviet Union, which Fukuyama (1989, p. 3) described as an indisputable victory for the Western coalition grounded in universal democratic values, the newly established world order initially appeared unchallenged. Subsequent geopolitical shifts and domestic political changes in both the United States (US) and Europe have reshaped transatlantic relations. The return of a more unilateral US foreign policy orientation after the 2024 election has intensified existing tensions within the transatlantic alliance, resembling earlier episodes of transatlantic divergence but occurring in a more structurally competitive global environment. These tensions reflect a structural shift from value-based alignment to interest-driven cooperation, setting the stage for subsequent challenges in both NATO coordination and European Union (EU) strategic planning.

These developments suggest a transition toward a more transactional phase in transatlantic relations, in which institutional continuity persists but normative cohesion weakens

During Trump's first term, the White House displayed a largely sceptical and sometimes openly critical attitude toward its European partners. His rhetoric consistently accused Europe of complacency and of disproportionately benefiting from substantial US investments in the North Atlantic Treaty Organization's (NATO) defence infrastructure (Tzvetkova, 2017, p. 221). Even the temporary thaw observed at the summer NATO summit in The Hague, which was conducted in a highly favourable atmosphere for President Trump and marked by repeated European assurances of loyalty to his strategic objectives (Jozwiak, 2025) failed to restore a shared value-based coherence between the two sides. The growing number of contradictions, unresolved media and personal conflicts, along with deepening strategic mistrust, have led to increasingly harsh criticism of European foreign policy and its chosen ideological path (Horowitz, 2025). Strong criticism from the Trump administration towards several socio-economic decisions adopted by the EU, combined with the explicit framing of certain European policy approaches in the US National Security Strategy (NSS) as obstacles to American interests, were described as potentially damaging development to the transatlantic alliance (Van Rij, 2025). These developments suggest a transition toward a more transactional phase in transatlantic relations, in which institutional continuity persists but normative cohesion weakens.



From Value-Based Alliance to Strategic Friction

Prior to Donald Trump's inauguration, European officials had sought to minimise the risks of renewed friction (The Economist, 2025). Nonetheless, confrontational rhetoric persisted. The first signals came from repeated public statements and congressional addresses, in which Trump proposed placing Greenland under US control, citing American national interests (Vock, 2025). Given that Greenland is part of the Kingdom of Denmark, a NATO member and US ally, these statements heightened European concerns and signalled the beginning of strategic recalibration.

Another source of tension was overt US support for European nationalist actors. The decision to invite many of these actors to his inauguration rather than officials from Brussels was widely interpreted as a sign that the new administration '[...] prioritises ideological ties over strategic partnership with Europe' (Rasquinho, 2025). Such an assessment may, however, overemphasise symbolic politics. Strategically, the Trump administration appears to prioritise right-leaning governments perceived as more compatible for building a framework of strategic cooperation. In this sense, US policy increasingly reflects a more realist approach to international relations, emphasising sovereignty, power-balancing, and national interest over multilateral institutionalism. This realist orientation increasingly frames Europe not simply as an ideological partner, but as a set of actors whose strategic alignment must be continually negotiated, especially in the context of security commitments and regional conflicts.

A striking example of this approach is the joint military operation by the US and Israel against Iran, which triggered escalation in the Middle East, increased energy prices, and intensified tensions between the Trump administration and its European NATO allies. Despite repeated calls from the White House to support the military effort and assist in securing the Strait of Hormuz to ensure the free flow of oil, Europe's response was largely unified in the message that 'this is not our war', followed by appeals for de-escalation (Starcevic & Jack, 2026).

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The Munich Speech and the Ideological Divergence

Moreover, nearly a month after Trump's inauguration, Vice President J. D. Vance delivered a landmark speech at the Munich Security Conference, provoking strong reactions across Europe (The Guardian, 2025). The address opened with a reference to '[...] our shared values' uniting the two allies within the transatlantic bloc, only to pivot towards a stark critique that Europe has retreated '[...] from some of its most fundamental values - values shared with the United States of America' (Vance, 2025).

The Vice President's remarks drew extensively on the legacy of the Cold War victors, whom he argued now differed little from actors that '[...] censored dissidents, closed churches, and cancelled elections' (Vance, 2025). The speech signalled that where ideological divergences exist, the US may reconsider military commitments and security guarantees to countries no longer considered fully democratic. According to The Economist (2025), the Munich speech, combined with renewed engagement with President Putin and Europe's exclusion from the Ukraine negotiations in Riyadh, reflects broader systemic shifts rather than isolated rhetorical confrontation.



In this environment, the EU faces increasing pressure to develop and apply hard power capabilities more effectively to avoid being sidelined in the reconfiguration of the international order (The Economist, 2025).

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Yakymenko and Pashkov (2025, p. 24) emphasised the watershed nature of Vance's Munich address, noting that 'today, concepts like "Euro-Atlantic political and ideological unity and solidarity" and "the collective West" evoke more nostalgia than reality'. It should be noted that nearly a year later, at the Munich Security Conference of 2026, the position of the US was articulated by Secretary of State Marco Rubio, who delivered a less overtly critical address toward European allies while maintaining the administration's unilateral strategic approach (Lee, Burrows & Moulson, 2026). The phrase 'we belong together', voiced during the speech, generated cautious optimism among attendees and was met with sustained applause; however, the core foreign policy orientation of Trump's administration remained unchanged. It continued to reflect an Americentric approach, coupled with a preference for building an axis of strong and self-sufficient allies (Hudson & Francis, 2026). Overall, the conference unfolded against the backdrop of a potential cascading erosion of the foundations of the post-Cold War liberal order, which the White House increasingly views as obsolete (Munich Security Report, p. 19).

Ukraine and the Changing Format of Transatlantic Diplomacy

According to Everts et al. (2025), 'US-Europe relations are now characterised by deep mistrust and uncertainty: allies and partners cannot take Trump's commitments for granted'.

In the Ukrainian context, the Trump administration adopted a unilateral approach, excluding Europe from direct negotiations with Russia, reflecting broader strategic shifts within segments of US foreign policy thinking. Despite repeated appeals for transatlantic unity and democratic solidarity, the US administration organised a summit with President Putin in Anchorage, Alaska. Europe had limited influence in formal negotiations, effectively limiting its role in high-level US-Russia negotiations. According to Everts et al. (2025), 'US-Europe relations are now characterised by deep mistrust and uncertainty: allies and partners cannot take Trump's commitments for granted'.

These actions have reinforced longstanding European concerns that, guided by short-term strategic calculations, Donald Trump and potentially future Republican administrations may abandon the established logic of transatlantic solidarity (Greene, 2025). The Anchorage summit symbolised a break with previously coordinated Western messaging. The recently published NSS calls on partners worldwide to align strategically and ideologically with the US as a condition for alliance, identifying certain European policy approaches as obstacles to Washington's strategic objectives within a shifting international system. Namely, these include the normalisation of relations with Russia, the establishment of peace in Europe, and the reorientation of US strategic resources toward other regions (NSS, p. 27).



The Strategy reiterates familiar critical narratives of contemporary European governance, including allegations of democratic backsliding, restrictions on freedom of expression, escalating migration challenges, and a perceived erosion of Europe's civilisational identity (NSS, p. 25). This criticism is framed through the 'Promoting European Greatness' slogan (NSS, p. 25). This apparent contradiction suggests that the Trump administration does not indicate an intention to disengage from Europe as a geopolitical partner, continuing to view it as 'strategically and culturally vital to the United States' (NSS, p. 26). This framing suggests that Europe is perceived not only as a strategic partner, but also as part of a broader cultural-political reference system within US foreign policy thinking. At the same time, the White House appears willing to support European strengthening only insofar as it remains compatible with American national interests.

The publication of the Strategy has already been widely described as a major confrontation with reality, comparable in impact to Vance's Munich Security Conference speech (Harding, 2025). It is notable that in the present round of negotiations, conducted under the auspices of the US across various global venues, European actors are effectively absent at Russia's request in key negotiation formats. Despite Europe's systematic financial support for Ukraine, the EU is not officially represented at the highest negotiation level. Brussels' role is mainly limited to supporting Ukraine's EU accession, a step seen as insufficient by more proactive European policymakers (NV, 2026).

Europe's Reactive Position and Strategic Ambiguity

Washington's proactive actions have left Europe in a constrained position with a limited set of strategic options in an increasingly fluid international order. In response to Trump's unilateral attempts to redefine the rules of the international order, European leaders reacted primarily through institutional channels, proposing an alternative framework for a peaceful settlement of the conflict in Ukraine. A recurring counter-proposal to the American plan, which suggested that territorial changes should follow a freeze along the current frontline, was rejected by both the US and the Russian Federation (Squires, 2025).

As has been pointed out, 'it is astonishing that there is still no European plan to end the war that defines solutions to the key issues' (Meister, 2025). The continued lack of clarity regarding security guarantees from the European coalition, as well as the mechanisms for post-war reconstruction, underscores the EU's limited capacity to act as a dynamic actor, particularly in high-level diplomatic negotiations and rapid military decision-making. These limitations also partly reflect structural capability gaps and institutional constraints rather than purely political hesitation. While the EU has taken significant steps in financial and military support, notably through macro-financial assistance, the European Peace Facility, and successive sanction packages, its unclear strategic line and reliance on persuading Washington highlight its dependence and limited ability to defend its interests. '[...] Critics argue that Europe risks being marginalised in shaping its own strategic future because it refuses to write anything at all' (Stratulat, 2025). Against the backdrop of Russia's gradual exit from international isolation through its return to the negotiating table with the US, European capitals have nonetheless mobilised efforts to support Kyiv. While Washington pursues its strategic national interests through a more unilateral diplomatic approach, the EU's allocation of a €90 billion loan to Ukraine over the next two years signals long-term commitment. This occurs despite intra-European disagreements on the use of frozen Russian assets (Hallam et al., 2025).



Consequently, the EU has yet to form a coherent strategic agenda or secure Europe a decisive role in shaping future peacebuilding outcomes. While the EU's decision clearly runs counter to the Trump administration's plans to bring an end to the war in Ukraine at virtually any cost, it remains constrained, still operating within frameworks largely shaped by external powers (Ragozin, 2025). In this sense, Brussels appears to be using institutional and bureaucratic mechanisms to buy time both for its own rearmament and for slowing the implementation of Washington's plans. At this crucial juncture, Europe remains an efficient institutional actor, yet a politically hesitant one.

The situation is further complicated by intra-European divisions, particularly between Eastern and Western states, stemming from divergent approaches to Russia, defence investment, US engagement, and visions of the European project. These divisions hinder the formation of a unified European strategic posture.

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Strategic Dilemmas in an Emerging Multipolar Order

Growing tensions between formerly aligned allies confront Europe with a set of critical strategic dilemmas that will shape its international role. Donald Trump's repeated statements about the end of American hegemony and the emergence of a multipolar world reflect a strategic assessment of an evolving international system (Gujer, 2025). Gujer notes, 'this shift is not the result of US decline, but rather of the renewed strengthening of China and Russia following a prolonged period of weakness'.

European support for Kyiv aims both to defend democratic values and to prevent a potential military escalation with Russia (Norman & Michaels, 2025). This logic underpins the increasing divergence in strategic approaches between the transatlantic partners. Since Trump sees rapprochement between Russia and Europe as a necessity to prevent further escalation of the military conflict, the EU perceives Russia as a potential threat to its sovereignty (Norman & Michaels, 2025).

This divergence gives rise to one of Europe's central dilemmas: How can Europe strengthen its strategic capacity and defence readiness while reducing excessive dependence on its primary security ally? There is a significant risk that Europe and Ukraine could be compelled to accept peace agreements that would place them at a structural disadvantage. Costly compromises by Kyiv and Moscow on territorial issues and security guarantees risk undermining the foundation of European and transatlantic security as they are understood and defended in Brussels (Tafuro Ambrosetti, 2025). The international order, built on post-World War II and Cold War arrangements, is gradually eroding under pressure from emerging non-democratic powers with advanced economic and technological capabilities, reflecting a broader systemic transformation of global governance structures. The US has adapted relatively quickly to this new reality, particularly through more unilateral and interest-driven foreign policy actions, as reflected in its interventions in Venezuela and Iran. The question remains whether European capitals can adjust to these structural shifts and assume the role of a strong, less bureaucratized, economically and militarily self-sufficient actor, or whether they will remain passive and exposed to external pressure (Lucas, 2025).



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Strategic Pathways for the European Union

The current instability within the transatlantic alliance confronts the EU before multiple strategic trade-offs, with political, economic, and systemic risks. The EU can reduce its dependence on US security guarantees by reallocating internal defence resources, strengthening intra-European burden-sharing, and enhancing independent operational capabilities. Such an approach mitigates risks stemming from US electoral cycles and shifting foreign policy priorities.

Continued inaction on the part of the EU leaves Europe vulnerable and without the tools to define its own strategic agenda (Giuashvili, 2026).

Gradually expanding autonomy allows the EU to sustain transatlantic cooperation while diversifying its defence capabilities, particularly in air defence, ammunition production, and logistics, as well as strengthening crisis-response mechanisms and attracting external partnerships. This includes the development of measurable targets for joint procurement, force readiness, and more integrated command structures. Through this, Europe gains more room for manoeuvre in relations with the US and other actors, acting as a cohesive bloc with clear geostrategic interests within a changing international system.

Achieving this requires minimising intra-member disagreements and advancing industrial, military, and political integration. Significant financial investment, institutional reform, and political consensus are essential to overcome internal and external resistance. In sum, the EU faces a choice between two strategies with comparable risk: accelerate strategic autonomy within the NATO structure or maintain dependence. Continued inaction on the part of the EU leaves Europe vulnerable and without the tools to define its own strategic agenda (Giuashvili, 2026).

European Strategic Capacity: Scope, Limits and Trade-offs

In today's rapidly changing world, shaped by government turnover, leadership shifts and the growing influence of right-wing political forces, Europe can no longer rely on stable external support. Over-reliance on alliances, without building greater strategic autonomy, risks leaving Europe vulnerable. The evolving relationship between the EU and the US exemplifies this dynamic. What was once framed as a partnership grounded in shared values and strategic unity has increasingly given way to ideological and economic divergence, particularly in approaches to the Russia-Ukraine war and broader questions of strategic coexistence in an evolving global order.

Over-reliance on alliances, without building greater strategic autonomy, risks leaving Europe vulnerable.

In its updated NSS, the Trump administration stated that it no longer sees the role of global hegemon as an obligation, expecting allies to increase autonomy while prioritising US national interests. This shift leaves European capitals facing a clear di-



lemma: either develop full strategic autonomy, requiring political responsibility, military investment, and institutional recalibration, or maintain dependence on the US.

The latter option would limit Europe's influence on the future international order, leaving it dependent on external decisions. Nevertheless, the pursuit of full strategic autonomy may entail substantial financial costs and lead to the duplication of existing NATO structures, potentially resulting in an unclear and fragmented security architecture. If such decisions are not carefully coordinated with the US, the shift could undermine the overall coherence of transatlantic deterrence.

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The Austrian Society for European Politics (Österreichische Gesellschaft für Europapolitik, ÖGfE) is a non-governmental and non-partisan platform mainly constituted by the Austrian Social Partners. We inform about European integration and stand for open dialogue about topical issues of European politics and policies and their relevance for Austria. ÖGfE has a long-standing experience in promoting European debate and acts as a catalyst for disseminating information on European affairs.

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