

# Europe Home Alone

What if Trump returns?



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# Introduction

## Gaming Out the Future of Transatlantic Relations



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Protectionism, domestic polarization and democratic backsliding put the United States' leadership of the West into question during the presidency of Donald Trump. While the Biden administration has improved transatlantic cooperation in several areas, serious concerns remain that this period is merely an “interregnum” in transatlantic relations. At the same time, Russia's war against Ukraine and the ongoing challenge of China have highlighted Europe's reliance on its partnership with the United States.

Against this backdrop, the Körber Policy Game brought together a small group of high-level participants from France, Germany, Poland and the United Kingdom to assess policy options for Europe in case of a significant shift in US domestic and foreign policy and a breakdown of democratic and transatlantic institutions. Which political, economic and security interests are at stake? And which policy options do European countries have at their disposal?

The Körber Policy Game is based on the idea of projecting current foreign and security policy trends into a future scenario, and in this way seeking to develop a deeper understanding of the interests and priorities of different actors as well as their possible policy options. Previous Körber Policy Games have discussed an escalation in the Taiwan Strait, Europe's future after COVID-19, and Turkey's role in Syria.

The discussions took place in a confidential setting in Berlin in June 2022. This report summarizes the insights and positions generated by the Körber Policy Game. Please note that it reflects the analysis of the authors and not necessarily that of the participants. Special thanks go to Damir Marusic of the Atlantic Council of the United States for his participation and his contribution to this report.

## Executive Summary



### What is Trump's legacy in Europe?

Donald Trump's presidency left Europeans grappling with the implications of his possible return to power. For the Polish team, a second Trump term would not necessarily signal the end of the West; if channelled properly, it could be a continuation of traditional Republican foreign policy priorities in line with Polish interests. While the British team would try to act as a bridge between Europe and the United States, the German and French teams expected a highly transactional and the end of a values-based relationship as well as limited possibilities to influence US policy, with no more "adults in the room."



### Can the United Kingdom and France step in and step up?

While the British team was willing to demonstrate leadership in European security after a potential US withdrawal from Europe, the French team stressed the importance of managing expectations of what could be achieved in the security realm. The French team would be concerned that France could not offer a nuclear deterrent that matched the credibility of the existing US one. For the Polish team, French commitments and capabilities were seen as not credible. If offered, Poland would seek bilateral security guarantees from the United States, even at the risk of undermining NATO, and negotiate access to US nuclear sharing.



### Is Ukraine lost without US support?

The policy game revealed the centrality of the US role in European security – and in European unity. While the Polish and British team vowed to continue supporting Ukraine and taking a strong position on Russia, the German and French teams were particularly sceptical of their own ability to support Ukraine militarily and were unsure whether Europe could maintain pressure on Russia if the United States were to stop weapon supplies and partially lift sanctions.



### What if Russia attacks NATO territory?

A Russian attack on NATO territory – in this policy game, on Norway's Svalbard islands – would be a unifying moment for Europeans. Even if a Trump-like US administration did not fulfil its Article 5 obligations, Europeans would mobilize their capabilities to come to the aid of Norway and to help it reconquer Svalbard – if necessary, in a NATO-minus-one (that is, without the United States) framework. An attack on Svalbard was seen by European teams as manageable without the United States – unlike the war in Ukraine. However, the teams were divided on whether Western "horizontal escalation" in response to Russia's attack on Norway – such as closing off the Baltic Sea and Kaliningrad – would be feasible or desirable.



### Alignment with Trump on China?

If pressed by a Trump-like US administration, most Europeans would follow it in a more assertive policy towards China in return for US concessions on energy or trade. Germany, however, would be in a particularly difficult position due to its economic dependence on China. The economic impact on the United Kingdom would also be substantial. The French team would attempt to unite the EU around a joint China policy and use the EU's leverage in trade issues to sway the United States.

## Methodology

The Körber Policy Game is based on a short-to-medium-term scenario including three escalating game moves and is provided to the participants on the day of the event. The scenario does not seek to predict the future and is not a forecasting tool. Instead, it serves as an instrument to enable the participants to discuss the policy game's guiding questions as well as the interests and policy options of different actors in concrete terms. To limit the complexity of the scenario, it is generally based on the assumption that the current state of affairs is projected into the future in all aspects that are not explicitly mentioned. The context of the scenario is therefore in most aspects a linear continuation of the current situation. The participants of the Körber Policy Game are high-level participants from four countries (this year: France, Germany, Poland and the United Kingdom). During the team sessions, the teams do not interact with each other. They discuss their country's interests and develop tactical and strategic recommendations, which are then presented to all participants of the Körber Policy Game. Participants do not play roles. Instead, they represent a team of government advisors, developing recommendations in line with their understanding of their country's national interest. In selecting the members of the country teams, an effort was made to include diverse political views. All discussions at the Körber Policy Game take place under Chatham House rule.

# Policy Recommendations

## 1. Use the Weimar Triangle to develop a joint approach towards a Trump-like US administration.

To find a common stance towards a Trump-like US administration, Europeans should accept that perceptions of Trump's first term differ in individual countries, especially in Central and Eastern Europe. Lessons learned from the first Trump term should be used for a deeper understanding of what Europe is dealing with and where interests align and diverge. This will help to set the stage for building contingency plans should Trump regain the presidency. A strong Weimar Triangle alliance of France, Germany and Poland within the EU could help prepare Europe for a potentially turbulent future and serve as a foundation for a coordinated strategy towards the United States.

## 2. Improve EU-UK cooperation on security and defence.

Establishing closer coordination between the United Kingdom and EU member states is crucial for improving European resilience in the face of possible attempts by a Trump-like US administration to blackmail Europeans with US security guarantees. A European Security Council, including the United Kingdom and the EU, could strengthen the European pillar in NATO and help partially shore up existing security gaps in the continent. Better integrating the United Kingdom into European security planning will not by itself insulate the continent from any possible future shocks, but drawing it closer today will help stabilize Europe in the future.

## 3. Plan for contingencies in Ukraine.

As early as possible, Europeans should draw up scenarios for how to support Ukraine militarily and financially as well as to uphold sanctions on Russia should a Trump-like US administration change the United States' course. While understanding that European countries could not fill the gap in security support should the United States pull away from Ukraine, the EU ought to start strategizing over how it might leverage its financial resources to soften the blow, including making plans for a crash increase in its military capabilities.

## 4. Prevent bilateralism.

Despite the initially unifying effect on Europeans, the war in Ukraine and the question of weapon deliveries has led to tensions and mistrust between Central and Eastern European countries and Western European ones, posing potential dangers in the medium term. Trust needs to be restored to prevent the bilateralization of security relationships with the United States during a possible second Trump term, at the expense of NATO's collective defence. The first step is to recognize that the problem is real and growing. The second is for Western countries to loudly and forcefully seize on opportunities to meet their frontline allies more than halfway in facing the Russian threat. Third, Western European countries should actively make the case as to why a bilateralization of security guarantees would leave everyone worse off – with volatile transactional security relationships instead of collective defence pledges.

## 5. Make strategic use of Europe's economic strength.

Maintaining a strong stance towards Russia as well as leverage with a Trump-like US administration is only possible if Europe is in a strong economic position. It is therefore crucial for European countries to make their economies resilient against further shocks, to diversify their energy supply so as to reduce dependencies and to intensify trade and investment with partners other than China. This will decrease Europe's vulnerabilities and enable the continent to negotiate from a stronger position.

## 6. Develop independent security contingency plans for a post-US world.

European policymakers often recoil from planning for the eventuality of the United States abandoning the continent for fear of encouraging strategic drift in Washington. This misunderstands fundamental power realities in a world where demands on US attention especially in the Indo-Pacific are growing. Only resilient and energetic allies strengthen sustainable partnerships, and only a credible build-up of capabilities will help Europe stand its own ground. Thinking through scenarios and being prepared is a mark not of doubt about existing alliances but of responsible partnership.

# The Scenario

## Transatlantic Relations at a Breaking Point

### January 2025

After the US presidential elections in November 2024, Donald Trump pronounces himself president-elect. The legitimacy of the election results is highly contested despite a Supreme Court ruling confirming the results. Once in office, Trump installs loyalists in crucial positions, reinstates sanctions against China and launches libel suits against news media, civil rights activists and NGOs. Towards Europe, he pursues a divide and rule policy and offers a free-trade agreement to the UK as well as full support for Hungary should it decide to leave the European Union. Despite renewed Russian attacks on Ukraine, in what has become a low-intensity protracted conflict, Trump declares that he wants to lift sanctions on Russia and stop supplying weapons to Ukraine.

### June 2025

By summer 2025, the spectre of stagflation has become a reality for most Western economies. Trump reinstates tariffs against the EU, demanding that member states join the United States in imposing harsh sanctions on China. He announces a reduction of exports of US liquefied natural gas to Europe. In Ukraine, Russia makes territorial gains as Kyiv struggles with limited military supplies from the United States. At the NATO summit in June 2025, Trump announces that he will withdraw all US troops from the alliance's eastern flank stationed there after February 2014. At the same time, he offers bilateral security agreements to Poland, the Baltic states and the United Kingdom if they join his fight against China.

### September 2025

Norway reports increased Russian activity in the Barents Sea, but its demand for a deterrent NATO force on Svalbard remains unfulfilled. On 1 October, Russian amphibious units land overnight on uninhabited Bear Island, cutting off the rest of the Svalbard archipelago from Europe. Norway invokes Article 5 and asks the allies for support in reconquering Svalbard. Moscow announces that Russia has no intention to go to war with NATO but that any attempt to reconquer the island would lead to a nuclear response. Congress authorizes the deployment of US Marines to mainland Norway but rejects US military involvement in reconquering Svalbard.

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# Interests and Policy Options

## What if Trump returns?

Considering a scenario that involves the re-election of Donald Trump as US president, a rapprochement with Russia followed by US disengagement from Europe and Ukraine and finally an escalation with Russia in the Arctic, the four country teams defined their countries' interests and formulated policy options. The following sections outline the policies and crisis response that the teams would recommend to their respective governments in the given scenario.

### France

#### Protecting Europe and Managing Expectations from the East

The French team outlined two main priorities. First, France should maintain a working relationship with the United States, based on the experience of the first Trump term – even if there would be no more “adults in the room.” Second, France should aim to maintain unity within the European Union and resist US attempts to divide Europe. Should Hungary consider leaving the EU, Paris should not push Budapest in any direction. The French team was concerned about the possibility of Poland accepting bilateral security guarantees from the United States, as from a French perspective this would undermine not only NATO’s collective defence pledge, but also lead to rifts within the EU.

If the United States were to put NATO’s Article 5 into question and withdraw its troops from Eastern Europe, Paris would have to manage expectations from the East that it could step in and offer an alternative security guarantee. According to one participant, France cannot replace the United States in deterring a nuclear superpower like Russia. At the same time, France would stick to the NATO framework even without the United States. A European Security Council including the United Kingdom could facilitate cooperation between the EU and NATO.

In reaction to a Trump rapprochement with Putin and a halt of US weapons supplies to Ukraine, as well as a partial lifting of US Russia sanctions, the French team regarded the Weimar Triangle of France, Germany and Poland as an important option for European military supplies to Ukraine. However, it was sceptical of Europe’s ability to maintain or replace US military and financial support to Ukraine and to uphold the sanctions regime on its own. It expected a deterioration of the situation in Ukraine, with little that could be done to prevent this. France should not pursue major initiatives towards Russia, but rather focus on holding the EU together.

“Keeping the EU together would be more important than our relations with Russia and Ukraine.”



European unity was also seen as the appropriate response to pressure from the Trump administration to fall in line with a more assertive China policy. The EU should pursue a joint Indo-Pacific strategy and engage with the United States within the EU-US Trade and Technology Council. In reaction to the United States withholding supplies of liquefied natural gas to Europe, the French team suggested to reallocate financial means from the Green Deal.

A Russian attack on Svalbard was seen as a unifying moment for Europeans, with the French team expecting allies to fulfil their Article 5 duties immediately. France should support Norway militarily and, if asked by Oslo, also bring its own troops into the fight. France should make use of the Anglo-French Combined Joint Expeditionary Force and the UK Joint Expeditionary Force and deploy French Rafale fighter jets to Finland and Sweden (first without, and then rotating with nuclear capabilities to demonstrate seriousness). The French team would not be deterred by Russia's nuclear threats. An ad hoc coalition for command and control should be built, including Canada and Iceland. As a signatory to the Svalbard Treaty, France should call for a statement of all signatories, as well as a strong Franco-British statement, a UN Security Council resolution and a NATO-minus-one (that is, without the United States) statement condemning Russian actions. Last, France should encourage Poland to increase the pressure on Russia in Ukraine so as to keep Moscow busy on two fronts.

## Germany

### The End of the Status Quo

The German team expected EU unity to be in severe danger after a re-election of Donald Trump. Without the United States, the EU's position on Russia sanctions and military support for Ukraine would be difficult to maintain, even together with the United Kingdom, and the EU's economy would be in crisis. Nevertheless, Germany should attempt to proactively engage with a new Trump administration on all levels, including the states' level, and try to keep the United States in multilateral institutions. Should Hungary continue to undermine EU unity, Germany should not be opposed to it leaving the EU.

If the United States withdraws from Eastern Europe and questions Article 5, Germany should advocate for the rotating presence of a European NATO force in the region, even if the gap left by the United States would be difficult to fill. Strengthening the European pillar within NATO would require a defence mobilization scheme for Germany and the European arms industry. US offers of bilateral security guarantees to Poland and the Baltic states should be framed as an integral part of NATO so as to prevent the impression of a weakening of the alliance, according to the German team. As long as there was no explicit US withdrawal from NATO, the other allies should continue to act as if Article 5 and the US nuclear guarantee remained intact and the status quo continued.

The German team also suggested finding a coalition of the willing beyond Europe to support Ukraine and to simplify arms supplies to the country. However, the German team was sceptical that Europeans could mobilise the same amount of financial and military means for the defence of Ukraine as the United States, especially in a situation of limited resources.

On trade policy and China, the German team suggested a tit-for-tat EU approach towards the United States. Although Germany has no interest in sanctions on China, Europe should align to some extent with Washington and demonstrate willingness to support a more assertive China policy – for instance, on export restrictions or

“In a conflict with Russia and without the support of the US, Germany would have to rely on the UK's and France's nuclear capabilities.”



outbound investments – in return for US concessions on trade. Germany should also explore alternative sources for LNG supplies.

A Russian attack on Svalbard was regarded by the German team as an “all hands on deck” moment. Germany, together with Canada and Japan, should try to lobby Congress and make the United States reconsider its announcement not to come to the defence of Svalbard. A coalition of the willing should be formed, if possible, using NATO structures without the United States. Due to their nuclear capabilities, the participation of France and the United Kingdom would be crucial for a military mission, with Germany contributing its ground forces to the retaking of Svalbard. Ideally, the United States would passively support this effort with data sharing and logistics, if it were not actively involved. The German team discussed the question of creating a headache for Russia on other fronts without coming to an agreement.

## United Kingdom Comeback at a Moment of Crisis

In case of Donald Trump being re-elected as president of the United States and a drastic shift in US foreign policy, the United Kingdom would be faced with the dilemma of maintaining its position on Russia and Ukraine while sustaining its special relationship with the United States and protecting itself from global economic shocks. Strengthening the role of NATO and acting within this framework should be among the top priorities of the United Kingdom, according to the British team. That would include not interfering in the domestic affairs of the United States. The British team also emphasized the importance of stable relations with the European Union, despite the possibility of fractures within the Union or a potential development towards a multi-speed EU.

If Trump were to partially lift sanctions on Russia and withdraw from NATO’s Eastern flank, the United Kingdom and France would have to fill the gap and invest more means into nuclear deterrence. The British team would strive to uphold the United Kingdom’s position towards Russia, to prevent a Russian advance in Ukraine and to continue support for Kyiv, while being aware of the difficulties of doing so without the United States. The British team suggested using the leverage of European countries by offering a more hawkish position on China in return for as much US involvement as possible. Overall, the United Kingdom should aim to assume a leadership role on European security.

Against the backdrop of an economic crisis, energy shortages and an intense trade war with China, the British team recommended diversifying the country’s supply chains. The United Kingdom should be assertive towards China only if its economic situation allows, even at the risk of irritation on the other side of the Atlantic. A free trade agreement with the United States was viewed with scepticism out of concern for a lack of substance in US proposals.

A Russian attack on Svalbard would threaten a core strategic interest of the United Kingdom and thus trigger a strong response. This would not only fall under Article 5, but also endanger British energy security as Norway is a crucial supplier of crude oil and gas for the United Kingdom. The United Kingdom should therefore provide Norway with extensive military support to counter Russia’s aggression and serve as backfill for partners taking on an active role in the confrontation. If requested by Norway, the United Kingdom should also engage with its own troops, but it would expect other European armies to complement these.

London could use its position as a bridge to Washington to push for a more active US response. Reminding the United States of the

“In day-to-day politics, domestic policy is more important than Russia or China.”



parallels with a Chinese invasion of Taiwan, the United Kingdom could offer more British involvement in the Indo-Pacific to get the United States more engaged in Europe in return. Acting within the NATO framework would be vital in order to deter Russia from any further attacks on alliance members. The United Kingdom would also employ the multinational Joint Expeditionary Force to counter Russia's aggression within a coalition of the willing. It would also ramp up support for Ukraine to increase pressure on two fronts for Russia.

## Poland

### Keeping the United States In and Russia Out At Any Cost

The three main priorities identified by the Polish team were keeping the United States engaged in Eastern Europe, continued support for Ukraine's fight against Russia's aggression and a united EU. From the Polish perspective, a second Trump presidency would not stand in the way of close transatlantic cooperation. Poland should preferably act as the European base for a strong transatlantic link. A new Republican administration would not necessarily be perceived as evidence of the decline of the West, but rather a continuation of traditional Republican foreign policy priorities in line with Polish interests. There was a high level of confidence in Poland's abilities to "sweet-talk" a re-elected President Donald Trump and to continue close cooperation through interpersonal relationships.

Despite an expected improvement of European defence capabilities and increased military spending, the Polish team considered US boots on Eastern European soil still indispensable for Poland's security. In a situation where US troops were to definitively leave Europe, the Polish team suggested negotiating access to US nuclear capabilities. The team also called for additional European defence procurement programmes. Confronted with the opportunity to receive a bilateral security guarantee by the United States in return for a more assertive China policy, Poland would accept the offer immediately, knowing full well that this might undermine NATO. Poland should exploit as many opportunities for a more assertive trade policy towards China as possible, although remaining within the rules of the European single market.

Defining a strategic victory of Ukraine over Russia as a core national interest for Poland, the country team predicted a strong Polish advocacy campaign for the continuation, if not reinforcement, of the sanctions regime against Russia. The team expected not only European allies to join, but also the likes of Japan and South Korea.

In the face of energy shortages due to reduced US LNG deliveries, Poland would not see its own energy supply at risk and focus on supporting its European allies. The team also proposed establishing Poland as green energy leader of Europe, considering this unlikely but nonetheless in line with Polish interests.

In case of a Russian invasion of Svalbard, Poland would see its core security interests at stake. While its interests in Ukraine are perceived as more concrete, as it is closer to Poland's neighbourhood, Warsaw has Article 5 legal obligations to Norway and the situation should be treated accordingly. The Polish team outlined two strategic paths for the country in addition to coming to the defense of Norway. First, Poland should form an alliance including the Nordic and Baltic states, the United Kingdom and Canada, and focus on securing the Baltic Sea. Second, the team discussed opening a second NATO-Russia front in Ukraine by getting directly involved with troops, but without coming to an agreement, as well as a blockade of Kaliningrad.

"China is not an issue for Poland. Russia is."



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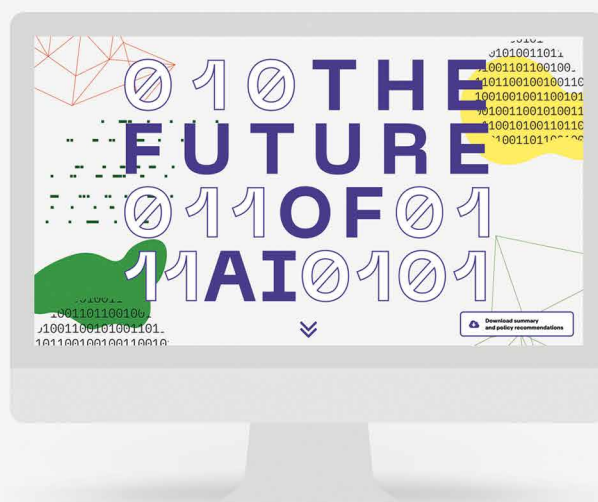
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