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No Longer Ironclad: America and the Transatlantic alliance

This policy brief analyses the implications of the second Trump administration for the transatlantic alliance and European security. It argues that US foreign policy under Trump represents a fundamental departure from the post-war tradition of sustaining a US-led rules-based order. Instead, the administration embraces a transactional, interest-driven approach that rejects liberal values, questions alliances as assets, and seeks to extract economic and political concessions from partners. While Europe is simultaneously expected to assume greater responsibility for its own security, US security guarantees are no longer perceived as ironclad.

The analysis identifies key characteristics of Trump's foreign policy, including scepticism toward NATO, the decoupling of security and economic cooperation, a deprioritisation of Europe in favour of China and the Western Hemisphere, and reduced US engagement in Ukraine. It concludes that these dynamics increase strategic uncertainty for Europe, weaken deterrence, and heighten the risk of miscalculation. While transatlantic cooperation may persist, the alliance is increasingly strained and may endure more in form than in substance.

The foreign policy of the second Trump administration is unlike any modern American administration. When Donald Trump won in 2016 he similarly challenged Washington foreign policy orthodoxy but he lacked a clear strategy, and crucially a roster of people to implement his "America First" foreign policy. During the interregnum between Trump presidencies there was a determined effort by Trump-aligned think tanks and aspiring future Trump administration officials to address that problem and define what an "America First" foreign policy meant. This time, the Trump administration entered office with plans.

What makes this administration very different is that the world it is seeking to create represents a radical departure from any past American foreign policy. US foreign policy since the Second World War has been about "world-making" – about strengthening a US-led world order. This administration is intent on disrupting that order and operating as if the international environment was truly anarchic and that all the rules, norms, and constraints that the United States helped establish in the past century no longer apply. The ultimate problem for Europe in this "might makes right world" is that this means that the United States, as a transactional actor

not attached to values, is an unreliable security guarantor. It also means that the US is seeking to move the world in a direction that Europe fundamentally does not want. Europe and the United States share divergent visions of the world order. That's a recipe for rupture.

Yet turning thinktank plans into new government policy is never straight forward. While the first Trump administration felt stymied by the "deep state" of career officials, this time President Trump's mercurial nature, his hyper involvement in decision-making, and his impatience for the wonkery of foreign policy making has meant that he does not always align with the America First plans developed in his name. Furthermore, there are always trade-offs in policy-making and given the absence of any robust policymaking process, the administration struggles to balance conflicting approaches.

This is particularly the case when it relates to the Administration's approach to Europe. On the one hand, the Trump administration seeks to transform transatlantic relations and to shift responsibility for European security to Europeans. On the other hand, the Trump administration seeks to extract concessions and tribute from allies and partners across the world who are seen as having been free-riders. Yet completing burden shifting, involving the withdrawal of US military forces in Europe, will inevitably reduce Europe's willingness to "pay up," whether that is on trade, digital, climate, or regulatory policy. There is therefore a tension between burden-shifting and transactionalism and it remains unresolved what the Administration wants or prioritizes. Presently, the Trump administration is attempting, confusingly, to pursue both objectives simultaneously.

How the Trump administration approaches the World

While the initial "America First" movement of the 1930s was isolationist in its approach, the Trump administration recognizes that the world today is too interconnected and America is too enmeshed for it not to be engaged with the world. Thus, President Trump and his administration is

heavily engaged with the world, just in a manner unlike any administration that comes before. In assessing the Trump aligned foreign policy thinking and the actions of the Administration's first nine months in office, a few characteristics and impulses emerge. Together, these do not necessarily make up a coherent strategy, as some of these are in tension with each other. But the following themes help shape how the Administration is engaging the world.

First, the Trump administration rejects the world order America built. It seeks to undo constraints on American power, dismisses the importance of liberal values to foreign policy, and does not believe in a rules-based liberal international order. Many Trump administration officials and thinkers seek to adopt a purely *realist* foreign policy. One that uses American power strictly to advance American national interests. Those interests are not to be defined broadly to incorporate aspirational values like advancing democracy or upholding norms of international behavior. But are defined narrowly, if not selfishly, with the goal of making America more powerful.

There is no attachment to liberal values or norms in the Trump administration. During President Trump's address at the UN General Assembly in September 2025 he did not mention the word "democracy" once. His first major speech of his presidency in Saudi Arabia attacked American interventionism and the pursuit of human rights, advocating countries [chart](#) "your own destinies in your own way." This approach is also firmly in line with the President's outlook toward norms and rules and decorum. The President is not adverse to breaking rules and therefore is not constrained by rules, norms, precedents and past agreements.

The scepticism of international institutions, rules, and norms also reflects a recurring line of thinking in the foreign policy of the American right. The neoconservative movement in the 1990s rejected the liberal internationalism of the Clinton administration and sought not to create a rules-based international order but to create an order where America set the rules and ruled

the world. In that sense, they put America first but America's role was to run the world, not just to look out for itself. The Trump administration however, as the following characteristics outline, does not seek to actually run the world.

Second, the administration wants to use American power to extract tribute and sees allies as ultimately free-riders and alliances as a burden. While past administrations have seen America's alliances as key to its global strength, the Trump administration does not value them. For President Trump, allies have been free-riding off America's protection and it is time to pay up. Thus, the Trump administration sees itself rebalancing relationships with allies where they have to pay for the privilege of receiving American protection.

This represents a sea-change in American foreign policy. John F Kennedy once sarcastically retorted after learning about a US-Europe trade squabble: "Is the grand alliance really going to founder over chicken?" That was unthinkable then. But now, it might. For the past 75 years, the US has largely avoided using its leverage as a security provider to extract economic concessions, understanding that should the US operate in such a manner, it would erode the alliance and US influence in the long run. But for Trump, everything is linked. What was evident in US-EU trade negotiations this summer is that there is no longer any separation between defense and economic issues. There was a clear sense in Europe that retaliating against US tariffs would impact US support for Ukraine and European security. EU Director General for Trade, Sabine Weyand [said](#) so directly that "the U.S. would abandon the security partnership with the EU" if the EU retaliated. Similarly, other US allies, such as Japan and Korea, have felt forced to make similar concessions to keep the United States engaged.

Third, the administration deliberately seeks to disrupt and revolutionize American foreign policy. What adds to the impetus to change and overturn and disrupt US foreign policy is the sense that the old way has failed. Washington has failed. One less-noticed driver of Trump's

foreign policy has been a cadre of veterans of the wars in Iraq and Afghanistan in the administration, who have come to see US foreign policy and the Washington establishment as bankrupt and in need of an overhaul. This has been voiced explicitly by Vice President JD Vance, a veteran, who has vigorously [attacked](#) the Washington foreign policy establishment. Secretary of Defense Pete Hegseth similarly has sought to upend the US military, believing it had grown soft and dismissing constraints on US warfighting, such as the [Geneva conventions](#). The Trump administration has therefore not been afraid to disrupt how Washington operates. The sudden closure of the US Agency for International Development, all but ending US development assistance, is one example. Another example is the closure of government-linked think tanks, the United States Institute of Peace and the Woodrow Wilson Center, as well as the reduction in federal funding to non-governmental organizations. The Administration is seeking to disrupt and upend the intellectual establishment in Washington, hoping that it helps clear the intellectual field for a more permanent shift in US foreign policy.

Fourth, the administration is deprioritizing Europe and does not see Russia as a strategic concern. This is driven by a few different outlooks in Trump's orbit. On the one hand, there is a view that China is of greater concern and it is past time for Europe to take charge of its own security. The Russian threat to the United States is also perceived as relatively minimal, as Russia's military is simply no match for the United States military. Additionally, should Europe finally take action it has time to prepare itself and deter Russia, while Russia is bogged down in Ukraine. This is the strategic outlook in Trump's Pentagon – and points to a shifting of military resources away from Europe.

There is a clear strategic logic behind this approach and in some ways it resembles the outlook of the Biden and Obama administrations that both sought to pivot to Asia. Yet what makes it different is that it was fairly clear that if European security came under threat both President Obama and President Biden would

quickly pivot back to Europe. It is not clear that the Trump administration would do the same.

Furthermore, this strategic outlook was also developed to align with the President's long-standing scepticism and hostility toward alliances, especially NATO, as well as his oft-stated desire to have a good relationship with Russian president Vladimir Putin and with the Russian Federation. There are few to no Europe or Russia hands in influential policy roles in this administration in part because of the President's past fondness for Russia. There are no Fiona Hills, or other well-known Russia experts, in this administration. Thus, Russia and Europe policy is left to the President. For most senior officials, it is better to avoid Russia, deprioritize it, than risk taking steps or saying anything cross-wise with the President's long-standing efforts to improve relations with Putin.

As for the war in Ukraine, despite the directionless flurry of peace-making efforts by the President, the United States wants to have little to do with the war in Ukraine. The President has not sought more funding from Congress for Ukraine, meaning all weapons deliveries to Ukraine are from money obligated during the Biden administration and that those deliveries are declining. The US Department of War and State Department have shown little interest in Ukraine. The Pentagon has sought to reduce the delivery of weapons systems to Ukraine that are in high demand and stop its military aid to the Baltic states.

Fifth, the Administration wants to bolster their far-right compatriots. Vice President Vance, in his speech at the Munich Security Conference in February 2025, clearly outlined that he saw the US and Europe as no longer sharing the same values and called for dismantling European technology regulations on content moderation. In the eyes of Trump's MAGA movement Europe, politically, represents the woke left, and is thus aligned with the Democratic party. The Trump administration is eager to support the growth of the far-right. The State Department appears determined to convert programs formerly used to support democracy and civil society

to instead support the growth of the far-right in Europe. This reflects an evangelist spirit often found in American foreign policy and contradicts the administration's supposed live and let live approach outlined in Saudi Arabia. The Trump administration has shown that it will help ideological allies, such as bailing out the Milei government in Argentina and saying nothing in response to Erdogan's jailing of political opponents. And that it will attack its ideological opponents, such as the left-of-center government in Brazil, South Africa, as well as democratic allies, like Canada and Denmark.

Sixth, much of the administration embraces a foreign policy of "restraint" and rejects an interventionist foreign policy. As noted, the Iraq and Afghanistan wars have deeply shaped a younger, up and coming generation of right-wing (and left-wing) foreign policy thinking. There is a strong desire, also reflected in the American public, to avoid intervening in foreign wars and only doing so if vital national interest is at stake. This is the isolationist impulse in the MAGA movement. Hence, the President's decision in June 2025 to support Israel by bombing Iranian nuclear sites was deeply divisive within his administration and amongst his MAGA supporters. But the inclination toward restraint and conducting a cost-benefit calculation should raise European concerns about America's willingness to go to war for NATO. This also impacts Ukraine, where supporting Ukraine is both seen as risking confrontation with Russia and as having little benefit or impact on the United States.

Lastly, there is a focus on the Western hemisphere and glorification of the 19th century era of American expansionism. The Trump administration has looked to the Presidency of William McKinley for inspiration and late 19th century expansionism. The President has called Canada the "51st state" and he is seeking to acquire Greenland, as well as the Panama Canal. The notion held in the UN Charter of sovereign inviolability and the rejection of territorial changes by force is not a principle this administration cares to defend. The Trump administration is quite serious about expanding

American territory – as seen by Vice President Vance’s and then-National Security Advisor Mike Waltz’s visit to Greenland. Additionally, the administration has increased the US military’s presence in the Caribbean, used military force against Venezuelan vessels, and is adopting a more aggressive approach toward Latin American drug cartels. All of this results in a shift of US assets and focus away from Europe.

Struggles in Implementation

In stark contrast to the first Trump administration, there is now a vision and direction that is embraced by Trump officials to fundamentally upend and alter transatlantic relations. Yet it is not clear these sentiments and characteristics can congeal into a coherent foreign policy approach. There are a few problems.

First, the Trump administration has run into the problem that Trump himself shifts constantly. The President lacks a coherent approach besides wanting America to be “great” and the center of attention. The lack of a clear outlook is not unique for American presidents but the problem for the administration is that President Trump is more central to foreign policy decision making than any previous president. Unlike the first term, where administration officials (“the deep state”) largely ignored the rhetoric of the president, in this term Trump’s top lieutenants pay attention to every word, as do career officials who are worried about losing their job. The upheaval of the White House National Security Council, fears from officials of getting out in front of and being contradicted by the President, and a lack of strong policy process has meant the administration has struggled for coherence and to explain its approach.

Second, a transactional foreign policy is prone to constant changes and evolutions. Defining American national interests, divorced from any sense of values or moral compass, is not so straightforward. A transactional foreign policy is also prone to corruption and side deals, meaning it’s never clear if the administration can be relied upon. Should an ally or partner make a

concession, it is not clear that the Administration, which is prone to short-term thinking, will follow through on what it committed or won’t return asking for more.

Third, President Trump appears to appreciate being part of the big clubs – G-7 and NATO – and likes the stage they provide. He has developed relationships with European leaders and he is clearly influenced by the people he talks to. Thus, despite the fact that the Trump administration now has a clear vision to *burden shift* on security, extract economic and policy concessions, and meddle in European politics, Trump has also developed relationships with leaders that may have contributed to holding back his officials from implementing this policy. While in the first term the “deep state” was the constraint on Trump, Trump may now be the constraint on his MAGA “deep state.”

Lastly, there is a path dependency to US foreign policy, which means there will still be some continuity in how America engages the world. US foreign policy stays the course, operating on past practice and policy, unless explicitly directed to change. The US has been committed to European security for 75 years. There are institutions and structures in place that are not just dismantled overnight. Thus, creating a revolution in American foreign policy requires giving explicit direction to change. And that direction has not fully come, yet.

Implications: What does this mean for European Security?

First, there is no iron-clad commitment to NATO. Article 5 does not mean what it used to. Given the characteristics of Trump’s foreign policy outlined above, Europe should be deeply concerned about America’s reliability.

If Russia invaded the Baltics, for instance, would President Trump send US forces to fight Russia and come to Europe’s defense? While Europeans seemed relatively reassured by President Trump’s comments at the Hague NATO Summit, he also noted that “there’s numerous definitions to Article 5,” meaning that the President is aware

that Article 5 does not actually bind the US to go to war. The US can live up to its Article 5 commitments without going to war. The fact that the President is clear on that distinction should be worrying for Europe. This is a distinction that past presidents *de facto* rejected. The Biden administration, for instance, firmly rejected Ukraine joining NATO while it was at war, in large part because that would have (in their minds) obligated the United States to go to war with Russia. NATO is premised on the US acting militarily to defend Europe should a war break out. To Europe, invoking Article 5 means America fights. Whether or not Portugal or Slovenia sends troops, is a secondary consideration.

A transactional foreign policy means the United States may ask the question: why go to war with Russia to defend the Baltics when Moscow has the ability to obliterate Washington in 30 minutes? This question and the doubt it raises about US extended deterrence has never been easy for American policy makers to fully answer. But that is even harder if the US no longer cares about shared democratic values, America's global credibility, the international order, and is susceptible to transactional deals and payoffs.

Additionally, an embrace of foreign policy restraint, the desire to focus on China and the Western Hemisphere, and the sense that Europe is a distraction further tilts the scale to non-interventionism. Lastly, the sense, as articulated by JD Vance, that the US and Europe do not in fact share the same values, as well as the President's desire to have warm relations with Vladimir Putin and Russia, make it harder to see the United States rushing to defend Europe.

Thus, the US will likely remain in NATO but may believe it can meet its Article 5 commitments to NATO by supporting Europe the way it has supported Ukraine: providing military aid, selling weapons, sharing intelligence, and providing strategic advice. But not putting US forces in harm's way.

Second, the Trump administration wants two contradictory outcomes: to wash its hands of

European security and to use Europe's security dependence to extract economic and policy wins from Europe. Trump's Pentagon has clearly indicated it wants to burden-shift and may, through the US force posture review and upcoming defense budget, significantly cut US forces in Europe.

Yet it also wants major concessions on other policy areas: trade, digital, climate, and other international issues. Major US technology companies, the titans of Silicon Valley, which have tremendous influence in the administration, see the global battle for tech regulation taking place in Brussels, since if the EU can successfully regulate them, it will set a global standard. Thus, the big tech firms believe they finally have an administration willing to use US leverage on their behalf to dismantle EU technology regulations.

However, Europe's willingness to make these concessions depend on the US security guarantee remaining. Just as the US is seeking to leverage its security relationship to extract concessions, Europe may similarly attempt to use this as leverage to extract concessions on the US security commitment. This was the logic behind EU concessions on trade. The problem for Europe is that even if US forces remain on the ground in Europe can it be sure that the United States will fight to defend Europe, as noted above. And if it can't be sure, is it worth paying the tribute demanded by Trump. Why pay for a service when it's not clear that service will be provided?

Third, the US and Europe have different visions for the world, which will cause tension. Europe is ultimately seeking to uphold a liberal rules based international order that America helped create. This may put it directly in confrontation with the US on major global issues. Europe's support for international institutions, like the International Criminal Court, the Paris Climate Accords and global climate action, will create tension with the Trump administration, especially if the Trump administration puts in place more sanctions against international institutions and officials. There are many potential collisions coming in transatlantic relations that could easily explode.

Lastly, the Trump administration wants to wash its hands of Ukraine and will likely continue to seek rapprochement with Russia. Trump has evolved in his views of the war – from blaming Ukraine to realizing that Russia is the reason peace is impossible. However, this does not mean he wants to actively support Ukraine. US military aid to Ukraine will significantly decline in the coming months and year. In July, in a meeting with NATO Secretary General Mark Rutte, Trump agreed to sell Europe or NATO weapons for Ukraine. While this is better than cutting off Ukraine and preventing weapons deliveries of any US systems, selling Europe weapons is hardly a magnanimous decision. In short, it looks like the US will continue sharing intelligence (which is vital) and selling weapons for Ukraine but will no longer be a central actor in the conflict. As Trump indicated in his Truth Social [post](#), the EU can support Ukraine. US economic sanctions against Russia are likely to remain and maybe tightened, as with the recent energy sanctions but are unlikely to be implemented with the bureaucratic energy and tenacity needed. While the Budapest summit was called off, it does not mean that President Trump will stop engaging President Putin. Russia will have a keen interest in wedging the US and Europe, and Trump has long sought a rapprochement with Moscow. And President Trump will likely seek to engage again following the Anchorage summit.

Conclusion

Despite the Trump administration's revolutionary approach to foreign policy, transatlantic relations in the fall of 2025 are in a better place than most expected in the spring of 2025. It is possible that this current uneasy peace in transatlantic relations continues, with the Europeans making certain economic and domestic policy concessions to keep the Americans in, and Washington continues to push Europe just hard enough to issue concessions but not too hard as to make the relationship snap. However, the chance for miscalculation and confrontation will likely grow – whether from US tech companies demanding the impossible or European leaders and publics growing sick of groveling to the American president.

Transatlantic relations will continue to operate in a minefield, where any misstep, any policy issue, could potentially trigger an explosion. The policy landmine most likely to detonate is tech policy. At some point the US will seek to aggressively push the EU and at some point the EU will implement its laws, such as the Digital Services Act. Additionally, EU climate regulations, from the Carbon Border Adjustment Mechanism to CSDDD have resulted in major pushback from well connected oil and gas firms that could be seized on by Trump. But other issues, from the State Department shifting its civil society support to the far right (the impact of which is likely to be seen in the coming year) to clashes over international institutions to a US invasion of Venezuela, could become major sources of tension. Europeans have also given the Trump administration a big stick to hit them with their spending pledges at the NATO summit, given there is little chance that the UK, France, and several others can afford to significantly increase defense spending. For a Pentagon committed to burden shifting, lack of progress will be leveraged internally within the administration to expedite US troop withdrawals on the grounds that Europeans are being duplicitous and will not stop free riding unless US forces depart. European cultivation of Trump may have served as a form of body armor for the transatlantic relationship, protecting it as it navigates this policy minefield, such that a misstep may not be fatal. But a misstep will still hurt.

But it is not just the Trump administration that will instigate tension. European publics willingness to slavishly cater to the Trump administration is dissipating. The reaction to the US-EU trade deal, as the summer of humiliation, is likely to stiffen the spine of the European Commission in future entanglements. Anti-American sentiment and a political reaction to appeasing Trump will grow and prompt a steelier European response. Bilateral engagement with Washington will continue but is unlikely to soothe Trump world's frustrations with Europe. European leaders that undermine European unity through bilateral engagement will also get blowback from other European leaders. Key interlocutors, like Finland's Alexander Stubb, will find it increasingly difficult

to play the role of transatlantic bridge builder. Additionally, as America enters an election year, lavish praise of Trump, as when Mark Rutte went on Fox News' prime time program and fawned over the President, will create domestic political blowback within the United States. Democrats will not look kindly on NATO as an institution or European leaders who, in an election year, act the way they have in 2025. This means the calling Trump "daddy" strategy will be more fraught in 2026.

Regardless, the trajectory however seems clear that transatlantic relations will grow more estranged. Ultimately, the Trump administration is trying to create a more anarchic might-makes-right world that Europe rejects. Furthermore, as Europe takes greater charge of its own security its willingness to bend to an undependable United States will fade.

The sinews that have linked the transatlantic relationship and made it the strongest alliance in history are being stretched or outright severed. An alliance that is not bound together by values, or a common approach to the world, or even a shared threat perception, is an alliance that may not last. While it may not be in either side's interest to end the NATO alliance – Trump likes the pageantry and attention; while Europe will hope something better comes after Trump – it may increasingly become an alliance in name only.

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