

# **“America First, Europe Adrift? Agree to Disagree on Territorial (Dis)integrity?”**

## **Territorial Integrity, FIMI, and the Transatlantic Security Crises”**

**John J. McCloy Fellowship Final Report**

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## **Abstract**

That the United States and the European Union no longer share a common understanding of territorial integrity, international norms, or the international liberal order is nothing new. However, what began as transactional pressure under Donald Trump's second term has rapidly evolved into a new U.S. grand strategy: a foreign policy based on *predatory interdependence*, the systematic exploitation of global dependencies across security, regulatory, and informational domains as coercive instruments. This strategy combines radical populism, territorial revisionist rhetoric, systematic information manipulation both domestic (DIMI) and foreign (FIMI)<sup>1</sup>, platform weaponization, conditional security commitments, and the financial rerouting of civil society support networks to reshape European strategic autonomy on American terms. Europe consequently faces a new "informational security dilemma": U.S. operations erode the domestic political agency of EU member states faster than those governments can build the autonomous capacities to replace them. The French new nuclear deterrence policy for European collective defense represents the first credible European response to this dilemma, but it is not enough and insufficient alone. Based on over 50 elite interviews conducted in Washington, DC, and New York between November and December 2025, this first report identifies core findings and proposes targeted policy recommendations for the European Union, Germany, and the transatlantic relationship.<sup>2</sup> All expert interviews were conducted under the Chatham House Rule: Sources are used without attribution by name, affiliation, or identifying detail. Interview quotations appear anonymized throughout.

## **1. A Strategic Break, Not an Episode**

National sovereignty and territorial integrity have anchored U.S. foreign policy since the Stimson Doctrine of 1932, when Secretary of State Henry Stimson declared that the United States would not recognize any territorial change achieved by force. That principle predates, and in important ways underwrites, the post-1945 multilateral order. Codified in the UN Charter, reinforced by the Helsinki Final Act of 1975 and the Budapest Memorandum of 1994,

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<sup>1</sup> The concept of FIMI itself remains contested. As the analytical perimeter of foreign information manipulation and interference has expanded to encompass domestically orchestrated disinformation campaigns, experts have begun to speak of DIMI, domestic information manipulation and interference, as a distinct but related phenomenon that existing frameworks were not designed to address. The definitional instability is not merely academic: international law experts continue to debate the normative foundations of FIMI as a regulatory category: see Dias, T. *Study on International Norms for Foreign Information Manipulation and Interference (FIMI)*. EU External Action Service, November 2023.

<https://www.eeas.europa.eu/sites/default/files/documents/2024/Study%20international%20norms%20on%20FIMI.pdf>. Proto, L., Lamoso-González, P. & García, L., "The EU's FIMI Turn: How the European Union External Action Service Reframed the Disinformation Fight," *Media and Communication*, vol. 13, 2025. The definitional instability is not merely academic: see also DisinfoLab, *Tackling Foreign Information Manipulation and Interference in Europe*, June 2024. <https://www.disinfo.eu/wp-content/uploads/2024/06/Tackling-FIMI-in-Europe-brochure.pdf>. On the EEAS mandate: <https://euvdisinfo.eu/foreign-information-manipulation-and-interference-fimi-explained>. The predatory interdependence dynamic described in this report sits at precisely this definitional frontier: it is neither purely foreign nor purely domestic interference, which is a structural reason why existing institutional frameworks fail to capture it.

<sup>2</sup> This report applies a Foreign Policy Analysis (FPA) framework to a corpus of primary source speeches and official statements, coding each for its contribution to the informational security dilemma argument. The corpus is organised around five codes: (A) Territorial Revisionism, statements challenging the inviolability of recognised borders; (B) Manufactured Debt, narratives framing U.S. security provision as a personal favour owed to the current administration; (C) Normative Demolition, arguments that undermine the rule-based international order the U.S. previously underwrote; (D) Regulatory Coercion, direct pressure on EU governance instruments including the DSA, data protection frameworks, and tech regulation; and (E) Domestic Interference, explicit targeting of European political actors, parties, and electoral processes. Most primary sources carry multiple codes simultaneously.

these norms became the foundational architecture of European security. That the administration now dismantling them is American makes the rupture categorically different from anything the order has previously survived.

Russia's war against Ukraine subjected these norms to existential military pressure. It also confronted the European Union simultaneously with two structural realities: the foundational dependence of European integration on U.S. grand strategy since 1945, and the growing incapacity of EU institutions to respond coherently to the challenges of the 21st century, constrained by treaty inflexibility, the unanimity rule in foreign policy, and the deepening politicization of member state positions that Washington has historically exploited and now systematically accelerates. The Trump administration's second term has compounded these vulnerabilities from an unexpected direction, not through conventional military pressure, but through the deliberate weaponization of the very interdependencies the transatlantic relationship produced. This report terms that dynamic *predatory interdependence*.

The administration's stated intentions regarding Greenland, the forced demographic restructuring of the Gaza Strip, the recovery of the Panama Canal, Ukrainian territorial concessions to Russia, and military action against Venezuela and Iran share a common transactional logic: Borders are negotiable functions of American power, and states owe the United States deference proportional to their dependence on it. This is not a coherent foreign policy doctrine in any traditional sense but an extraction architecture, and it is operationalized through several interlocking channels.

The **military dimension** of this coercive architecture became visible to the broader public with the U.S. military action against Venezuela in 2025. The subsequent assault on Iran opened a normative question that had previously remained largely implicit: As one senior interlocutor put it, "How is America's attack on Iran different from Russia's attack on Ukraine, or a possible attack by China on Taiwan?" If the most powerful military in the world conducts a unilateral strike on a sovereign state outside any UN authorization or collective defense framework, it renders such action, to borrow the German formulation, *salonfähig*: socially and diplomatically acceptable for other states to follow. U.S. action does not simply weaken the international legal order; it actively normalizes the revisionist logic that European governments have invested heavily in resisting, and against which they have calibrated the entirety of their response to the war in Ukraine.

The simultaneous pressure on European allies to join or endorse the Iran campaign extended predatory interdependence into a new register. Europe's security dependency was now being mobilized not merely to extract concessions on trade or regulation, but to secure European endorsement for actions that directly undermine the norms on which European security rests. The American-Israeli war in Iran, the closure of the Strait of Hormuz, and the resulting pressure on global energy markets, compounded the potential costs Europe was already absorbing from a military engagement it had no part in deciding and willingness to support; an illustration of how predatory interdependence operates through exposure as much as through direct coercion: European (and world) economies paid the price of American unilateralism without being its target. For Europe, the effect is to transform European strategic autonomy from a long-term aspiration for some member states into an immediate continental political necessity, while simultaneously exposing how far Europe remains from achieving it.

The **regulatory dimension** operates through direct diplomatic pressure on the European Union and other former partners to weaken or abandon regulatory frameworks, characterized by Washington as free-speech infringements. Interview evidence gathered for this research indicates that the U.S. State Department was tasked with generating options to pressure Europe into abandoning its counter-DIMI and FIMI architecture, its frameworks for detecting and responding to foreign information manipulation and interference from the beginning of this administration. This is a classic case of weaponizing regulatory dependency: The deep economic integration of the transatlantic relationship created leverage that can now be deployed against the institutional defenses Europe has built in

response to adversarial information operations. The irony is precise. The Digital Services Act (DSA) and the EU AI Act, among the most significant democratic governance frameworks produced in a generation, are now treated by Washington as trade barriers rather than public goods.

The **platform dimension** compounds this. American technology companies algorithmically amplify far-right parties across Europe, with “free speech” deployed as ideological cover for what is, in structural terms, one-sided political amplification. The U.S. CISA counter-DIMI and FIMI capacity was dismantled at the start of the administration’s second term, and the Global Engagement Center was closed by executive order in January 2025, removing two of the most significant institutional nodes in the Western response to information warfare.<sup>3</sup> Europe’s dependency on U.S.-owned platform infrastructure, built over two decades and deeply embedded in the information architectures of democratic publics, is turned against European democratic processes. The platforms are not neutral conduits; their algorithmic architectures produce political outcomes, and those outcomes are now systematically uncontested at the federal level in the United States.

The **far-right network dimension** closes the circuit. Senior administration and influential business figures act as direct interference vectors into European domestic politics, with the “natural allies” framing providing ideological cover for what would otherwise be recognized as foreign interference. Financial flows previously channeled through State Department exchange programs have been redirected toward conservative nationalist MAGA-aligned networks across Europe.<sup>4</sup> This represents a qualitative shift: For the first time, Europe faces a foreign interference claim originating from within the NATO alliance itself, one that weaponizes the civil society interdependencies built through decades of transatlantic partnership and turns them against the democratic foundations that partnership was ostensibly designed to protect. It is a political investment with a defined expected return.

These channels are structurally linked, not parallel. Regulatory pressure clears the legal space for platform weaponization; platform weaponization amplifies far-right networks; far-right networks generate the domestic political pressure that prevents European governments from responding coherently. This logic extends to the architecture of global governance: Having been foundational to NATO, the United Nations, and most major multilateral bodies, the U.S. now leverages its withdrawal from or disengagement within those institutions as an active coercive instrument rather than accepting the constraints of multilateral obligation. The result is a self-reinforcing loop operating below and outside of the threshold of traditional foreign interference detection frameworks, one whose security, defense, informational, and civil society dimensions scholars and analysts have yet to capture in full, not least because no existing framework was designed to account for an allied power deploying these tools simultaneously and in coordination.

The deepest analytical problem with the “America First” framing is that it systematically misidentifies what is being maximized. Legitimate national-interest pursuit, every government’s mandate, would optimize for U.S. strategic position: a stable and defended Europe, a deterred Russia, an open international trading system, and functioning multilateral institutions capable of managing collective challenges. What the Trump administration optimizes for is something narrower and more personal: the financial and political interests of a specific network of associated

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<sup>3</sup> The Cybersecurity and Infrastructure Security Agency (CISA) was an agency of the Department of Homeland Security. The Global Engagement Center (GEC) was an agency within the Bureau of Global Public Affairs at the Department of State. Both agencies were dismantled at the beginning of the current U.S. administration.

<sup>4</sup> On the rechannelling of U.S. public funding toward European institutions, think tanks and foundations, see: *Financial Times*, <https://www.ft.com/content/f8696da1-5fe6-4218-be9c-5309bd9a6ae5>; *Politico*, <https://www.politico.eu/article/maga-friendly-european-think-tanks-donald-trump-funding/>; *Der Spiegel*, <https://www.spiegel.de/politik/deutschland/lieferkettengesetz-wie-die-usa-versuchten-im-europaparlament-einfluss-zu-nehmen-a-e51c671c-d99c-49b1-916f-230c3fae9642>; *Le Monde*, [https://www.lemonde.fr/idees/article/2026/02/21/changer-l-europe-de-l-interieur-la-nouvelle-strategie-de-l-internationale-reactionnaire-a-bruxelles\\_6667647\\_3232.html](https://www.lemonde.fr/idees/article/2026/02/21/changer-l-europe-de-l-interieur-la-nouvelle-strategie-de-l-internationale-reactionnaire-a-bruxelles_6667647_3232.html); Le Rubicon (forthcoming), “Washington, coach civilisationnel de l’Europe ? Ce que le discours de Rubio à Munich révèle du projet MAGA pour le continent.”

actors, political operatives, and aligned media infrastructures. The Ukraine minerals deal, structured to benefit specific U.S. investors before any ceasefire has been agreed, reveals the extraction logic beneath the diplomatic surface. The trade tariff regime, presented publicly as a measure to protect American workers, functions in practice as a negotiating instrument that extracts bilateral concessions in the direction of this same network's commercial objectives.

In this context, the convergence between the administration's DIMI and FIMI campaigns and the commercial and regulatory interests of major American technology companies is not incidental. As the EU scales up the Digital Markets Act (DMA) and the Digital Services Act (DSA), frameworks that Washington characterizes as discriminatory against U.S. firms, the companies subject to those frameworks have acquired structural incentives to support the political effort to dismantle them. Platform infrastructure, regulatory rollback, and the amplification of political forces hostile to European governance capacity operate, in effect, as a single integrated system. "America First" is the informational infrastructure of predatory interdependence: It provides the radical populist legitimacy that makes the extraction politically durable domestically, while systematically obscuring its actual beneficiaries.

## 2. Europe's Informational Security Dilemma

Alliance theory in international relations describes how states face a perpetual tension between the risks of abandonment and entrapment. The current transatlantic crisis generates a new variant of this dynamic: what this report terms the "informational security dilemma."<sup>5</sup> Predatory interdependence produces this dilemma as its primary structural output: When a formal ally weaponizes informational dependencies against its partners' domestic political systems *intentionally*, it erodes those partners' political agency faster than they can build autonomous replacements. Classical alliance management mechanisms do not apply in this situation. Deterrence presupposes an external adversary to be dissuaded from hostile action; reassurance presupposes a guarantor

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<sup>5</sup> The concept of the informational security dilemma as developed here departs from the classical security dilemma in two respects that require acknowledgement. First, the classical security dilemma (as developed by John Herz in 1951 (see *Political Realism and Political Idealism: A Study in Theories and Realities*, University of Chicago Press, 1951) and Robert Jervis (see for instance *Perception and Misperception in International Politics*, Princeton University Press, 1978, chap. 3) presupposes unintentionality: states seeking only to secure themselves unintentionally threaten others. What this report describes is deliberate and coordinated. The "dilemma" inheres not in the intentions of the originating actor but in the structural trap it creates for the target: the faster informational dependencies are weaponised, the harder it becomes for the target to build autonomous replacements, regardless of whether the threat is recognised. Second, while classical security dilemmas presuppose adversarial relationships, the informational security dilemma is analytically distinctive precisely because it operates within a formal alliance: a trusted partner weaponising shared informational infrastructure is more damaging than an adversary doing so, because the target's detection and response mechanisms are calibrated for external threats. On the economic dimension of weaponised interdependence, see Farrell, H. & Newman, A., "Weaponized Interdependence: How Global Economic Networks Shape State Coercion," *International Security*, 44(1), 2019, pp. 42–79. The informational security dilemma extends this framework into the political agency domain: the damage is measured not in economic concessions extracted but in the erosion of democratic governments' capacity to act autonomously within their own political systems.

The classical formulation of intra-alliance tension between abandonment and entrapment remains Snyder (see for example Snyder, G.H., "The security dilemma in alliance politics," *World Politics*, 36(4), 1984, pp. 461–495). On the structural dynamics of asymmetric alliances and the conditions under which alliance cohesion breaks down, see Weitsman (Weitsman, P.A., *Dangerous Alliances: Proponents of Peace, Weapons of War*, Stanford University Press, 2003; *Waging War: Alliances, Coalitions, and Institutions of Interstate Violence*, Stanford University Press, 2013). On the specific vulnerability of European defense cooperation to populist pressure from within alliance structures and the politicisation of member state positions this produces see Henke, M. & Maher, R., "The populist challenge to European defense," *Journal of European Public Policy*, 28(3), 2021, pp. 389–406; and on European strategic autonomy as a structural response to that fragility, see Fiott, D., "In every crisis an opportunity? European Union integration in defense and the War on Ukraine," *Journal of European Integration*, 45(3), 2023, pp. 447–462; and Fiott, D., "Strategic competition: Toward a genuine step-change for Europe's defense industry?" *The Economics of Peace and Security Journal*, 18(1), 2023. The concept of predatory interdependence as developed in this project departs from these frameworks insofar as the coercive actor is the dominant alliance partner rather than an external adversary, a configuration that classical alliance theory does not adequately theorise. The closest analogue in the literature is the abandonment risk under hegemonic retrenchment; see Waltz, K.N., *Theory of International Politics*, McGraw-Hill, 1979; and Posen, B.R., *Restraint: A New Foundation for U.S. Grand Strategy*, Cornell University Press, 2014.

whose credibility is in question with respect to an external threat. When the ally providing the security guarantee is simultaneously the source of the informational threat, both mechanisms lose their structural preconditions: There is no external actor to deter, and no guarantor separate from the threatening party to reassure. The worst damage is done not through coercion of military capability but through **the erosion of political will and space**, by the very power whose assurances the alliance was built to provide.

The informational security dilemma produces three reinforcing dynamics. The abandonment-entrapment dilemma of classical alliance theory is amplified by informational uncertainty: In the (very) near future, European governments won't know how much of their **domestic political pressure is organically (and democratically) generated and how much is externally engineered**. Domestic political space for allied governments is reduced by far-right amplification that makes credible commitments harder to sustain. And the European regulatory and counter-DIMI and FIMI architecture is deliberately targeted, preventing autonomous response capacity in some European states from developing in the first place.

The dilemma is made structurally urgent by the temporal constraint that emerges consistently from this research: Russia's military capabilities are currently degraded following catastrophic attrition in Ukraine, but independent assessments converge on a reconstitution window of five to eight years before pre-2022 capability levels are restored. European appeasement strategies that defer hard choices until 2028 or 2029 (waiting for a U.S. electoral correction) risk exhausting this window. The current U.S. military engagement in Iran, the capture of Venezuelan President Nicolás Maduro in Venezuela, and the ongoing Greenland pressure campaign are not concurrent accidents, they are part of the deliberate product of a governance strategy theorized by Steve Bannon and operationalized at scale in the second term. The risk is that Ukraine, and the broader question of territorial integrity, falls into a fatal informational oblivion, drowned out by a cascade of crises none of which audiences, institutions, or the press were designed to process simultaneously.<sup>6</sup>

NATO's transformation during this period compounds the concern. The Article 5 commitment has been made conditional and definitionally ambiguous by the U.S. administration. Absorbed into the broader cascade of provocations and announcements emanating from the White House, the simultaneous withdrawal of U.S. rotational forces from Romania, Bulgaria, and Hungary in October 2025 functions as an informational signal as much as a military repositioning. What it communicates, cumulatively and deliberately, is that U.S. security commitments to the European continent are no longer unconditional.<sup>7</sup>

### 3. U.S. Strategic Interests, Ukraine, and Bargaining Chips

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<sup>6</sup> The "flood the zone" strategy was articulated by Steve Bannon, Trump's chief strategist in 2017, in a 2018 interview with journalist Michael Lewis: "The Democrats don't matter. The real opposition is the media. And the way to deal with them is to flood the zone with shit." The strategy — saturating the information environment with a relentless succession of controversial actions to disorient opposition, exhaust media capacity, and allow core policy objectives to pass uncontested — was systematized for the second term by Stephen Miller and implemented from day one, with 55 executive orders signed in the first 20 days. As Bannon himself put it in a separate interview: "All we have to do is flood the zone. Every day, we hit them with three things. They'll bite on one, and we'll get all of our stuff done, bang, bang, bang." On the governance implications, see: Illing, S., " 'Flood the Zone with Shit': How Misinformation Overwhelmed Our Democracy," *Vox*, 16 January 2020. <https://www.vox.com/policy-and-politics/2020/1/16/20991816/impeachment-trump-bannon-misinformation>; Newsweek, "Steve Bannon's 'Flood the Zone' Strategy Explained Amid Trump Policy Blitz," 6 February 2025. <https://www.newsweek.com/steve-bannon-flood-zone-strategy-explained-trump-policy-blitz-2027482>; NPR, "Trump Carries Out His 'Flood the Zone' Strategy," February 2025. <https://www.npr.org/transcripts/1229996820>.

<sup>7</sup> U.S. Department of the Army, U.S. Army Europe and Africa, "Department of War Announces Change to Army Unit Rotation in Europe," Press Release, 29 October 2025. <https://www.europeafrica.army.mil/ArticleViewPressRelease/Article/4326550/press-release-department-of-war-announces-change-to-army-unit-rotation-in-europe/>. Note: the press release was issued under the designation "Department of War," reflecting Secretary Hegseth's February 2025 directive renaming the Department of Defense.

Ukraine has become the primary laboratory for U.S. coercive informational statecraft in Europe. The convergence of operational signals – the Oval Office confrontation with President Zelenskyy on February 28, 2025,<sup>8</sup> the systematic exclusion of Europe from direct negotiations with Russia, the suspension of intelligence sharing, the leaked 22-page peace framework containing no military enforcement clause and the Board of Peace – points toward a deliberate strategy of making continued European support for Ukraine politically unsustainable from within.

The informational dimension of this strategy is its most analytically significant and most underrealized feature. From the administration's first days, U.S. diplomacy in the Ukraine file has operated on a dual logic: flooding the information space with misleading signals, including what one interviewee with direct knowledge of the process led by U.S. envoy Steve Witkoff described as performative negotiations designed to disinform allies about actual U.S. intentions, while simultaneously building coercive pressure instruments to extract concessions from other states, whether allies or not. Reinforced by a coordinated MAGA narrative architecture, the strategic goal is to convert pro-Ukraine parties into "parties of war" and position the far right as "parties of peace," a framing deliberately synchronized between U.S. MAGA networks and European far-right parties across multiple member states, and amplified through the platform infrastructure that predatory interdependence places at the administration's disposal.

Beneath this informational surface, the Ukraine negotiations reveal a structural feature of the Trump administration's coercive statecraft that is now being replicated across multiple conflict contexts: the systematic manufacture of debt obligations. Past and present U.S. security provision to Europe and Ukraine is recast not as a collective strategic investment in a stable international order, but as a personal favor extended by this administration, a debt to be repaid in political and economic concessions.<sup>9</sup> Ukraine is thereby repositioned from a sovereign state defending internationally recognized borders against an aggressor whose defeat is demonstrably in U.S. strategic interest, to a debtor who must accept the creditor's terms. This manufactured debt narrative is itself a FIMI operation: It is sustained through deliberate misrepresentation of U.S. strategic interest, amplified through platform infrastructure, and engineered to produce European and Ukrainian acquiescence to a settlement that serves neither party's long-term security. As the new U.S. tariffs and the 2026 State of the Union address confirm, despite the setback inflicted by the recent U.S. Supreme Court ruling, the administration is determined to continue using tariffs aggressively.<sup>10</sup>

The territorial dimension of the Ukraine case carries systemic implications that reach well beyond the conflict itself. As one senior U.S. expert warned in an interview, the "Pandora's box" of geopolitical ambitions of U.S. foreign policy is opened, since territorial disputes have become subject to the same transactional logic.

### **3a. "You Can Say Yes and We Will Be Very Appreciative, or You Can Say No, and We Will Remember"<sup>11</sup>: Coercion as U.S. Grand Strategy**

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<sup>8</sup> Trump, D.J. and Vance, J.D., Oval Office meeting with President Zelenskyy, 28 February 2025 [B + C + D]. Full transcript: <https://foreignpolicy.com/2025/02/28/trump-zelensky-meeting-transcript-full-text-video-oval-office/>.

<sup>9</sup> The "peace board" approach to Ukraine embodies this logic directly: a small group of U.S. principals with significant personal financial interests in post-war reconstruction, most visibly in the minerals deal negotiated with Kyiv as a precondition for continued support, frames the negotiation as American magnanimity rather than American strategic interest. The minerals deal, structured to embed specific financial interests of the administration's network as a precondition for continued U.S. mediation, makes the extraction logic concrete.

<sup>10</sup> On the Trump administration's continued reliance on tariffs as a negotiating instrument, see Chatham House, "Trump's tariff strategy: alive and well," February 2026. <https://www.chathamhouse.org/2026/02/trumps-tariff-strategy-alive-and-well>.

<sup>11</sup> Trump, D.J., Address at the World Economic Forum, Davos, 21 January 2026. Transcript: <https://foreignpolicy.com/2026/01/21/trump-davos-speech-transcript-greenland-nato-denmark-use-force/>. Senate Democratic Leadership archive: <https://www.democrats.senate.gov/newsroom/trump-transcripts/transcript-president-trump-delivers-an-address-at-the-world-economic-forum-in-davos-12126>.

Vice President Vance’s address to the 61st Munich Security Conference was the first unambiguous articulation of the administration’s posture toward Europe [D + E].<sup>12</sup> Trump’s first State of the Union address of his second term introduced the territorial revisionism narrative and manufactured debt logic unambiguously [A + B].<sup>13</sup> The “Liberation Day” tariff speech in April 2025 is the economic arm of predatory interdependence made explicit.<sup>14</sup> Operation Absolute Resolve, the U.S. military capture of Venezuelan President Nicolás Maduro, is analytically significant for the European context not because of Venezuela per se, but because of the “Donroe Doctrine pattern” it confirms and the normative precedent it establishes with extraction policy presented as benevolence, the manufactured debt logic applied to regime change.<sup>15</sup> European allies’ reactions were diplomatically cautious to alarmed: The parallels with Russian conduct in Ukraine, an indictment dressed as liberation, an extraction dressed as security provision, is precisely the normative collapse analysts identify.

**The Iran strikes** are the most direct evidence of normative demolition, locating legal authority in the President’s will rather than in international or U.S. law.<sup>16</sup> The strategic FIMI function emerged in the second strike (February 2026), when Trump cited Iran’s alleged threat to targets “throughout Europe” and “allied troops overseas” as partial justification, while simultaneously pressuring Europeans to endorse or join the operation. The Strait of Hormuz disruption, which directly raised European energy prices, functioned as economic coercion: Absorb the costs of a decision Europeans had no role in making, or pay the diplomatic cost of opposing it. As one interviewee observed, this dynamic “makes the Iran attack different from a standard military intervention, it weaponizes European exposure to the consequences of U.S. action as leverage over European political positions.”

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<sup>12</sup> FPA codes used throughout: (A) Territorial Revisionism; (B) Manufactured Debt; (C) Normative Demolition; (D) Regulatory Coercion; (E) Domestic Interference. Full definitions in the second footnote above. Vance, J.D., Remarks at the 61st Munich Security Conference, 14 February 2025 [D + E]. Full transcript: <https://foreignpolicy.com/2025/02/18/vance-speech-munich-full-text-read-transcript-europe/>. Archived at the American Presidency Project: <https://www.presidency.ucsb.edu/documents/remarks-the-vice-president-the-munich-security-conference-0>.

<sup>13</sup> Trump, D.J., Address to Joint Session of Congress, 4 March 2025 [A + B]. Full transcript: <https://time.com/7264688/trump-speech-congress-2025-transcript/>.

<sup>14</sup> Trump described decades of open trade as “looting, pillaging, and plundering” of the United States — inverting the liberal trade order’s founding logic (mutual gain through interdependence) into a narrative of systematic victimhood and debt. The EU’s 20% tariff, framed as evidence of European bad faith, positions the relationship as adversarial extraction rather than partnership. The speech’s FPA coding is primarily manufactured debt (B) and regulatory coercion (D): tariffs function as leverage instruments conditioning European market access on bilateral concessions, concessions that, as the evidence shows, include softening DSA enforcement, limiting tech regulation, and reducing counter-FIMI capacity. The Liberation Day framework was subsequently used as negotiating leverage in the EU-U.S. trade deals of July 2025 and for the new tariffs imposed in 2026, confirming that tariffs were instruments of coercive bargaining, not economic policy. Trump, Liberation Day, 2 April 2025 [B + D]. Trump, D.J., Remarks at “Liberation Day” Rose Garden event, 2 April 2025 [B + D]. Full transcript: <https://singjupost.com/transcript-of-president-trump-remarks-at-liberation-day-event-april-2-2025/>. Archived: <https://rollcall.com/factbase/trump/transcript/donald-trump-speech-economic-tariffs-rose-garden-april-2-2025/>.

<sup>15</sup> Trump, Venezuela/Maduro Capture, 3 January 2026 [A + B + C]. Trump’s remarks at Mar-a-Lago explicitly invoked the Donroe Doctrine: ‘American dominance in the western hemisphere will never be questioned again.’ He announced that the U.S. would ‘run’ Venezuela until a transition of power could occur and that U.S. oil companies would move in with military backing: ‘We’re going to take a lot of money out so that we can take care of the country.’ Trump, D.J., Remarks on the Capture of Nicolás Maduro, Mar-a-Lago, 3 January 2026 [A + B + C]. Full transcripts: <https://www.rev.com/transcripts/trump-speaks-after-us-strikes-venezuela-and-captures-maduro>; <https://www.democrats.senate.gov/newsroom/trump-transcripts/transcript-president-trump-discusses-the-capture-of-nicolas-maduro-in-venezuela-10326>. On the Donroe Doctrine dimension, see CSIS: <https://www.csis.org/events/donroe-doctrine-what-venezuela-means-china-russia-and-iran-state-play>.

<sup>16</sup> FPA codes used throughout: (A) Territorial Revisionism; (B) Manufactured Debt; (C) Normative Demolition; (D) Regulatory Coercion; (E) Domestic Interference. Full definitions in the other footnotes above. Trump, D.J., Address to the Nation on U.S. Strikes on Iranian Nuclear Facilities, 21 June 2025, and second strike statement, February 2026 [A + C; A + B + C]. Full transcript (June 2025): <https://abcnews.go.com/Politics/transcript-donald-trump-addresses-nation-after-iran-strikes/story?id=123084288>; AP version: <https://www.usnews.com/news/politics/articles/2025-06-21/transcript-of-trumps-speech-on-us-strikes-on-iran>. Second strike statement: <https://www.pbs.org/newshour/world/read-trumps-full-statement-on-iran-attack>. Fact-check: <https://www.pbs.org/newshour/politics/fact-checking-statements-made-by-trump-to-justify-u-s-strikes-on-iran>.

**The inaugural Board of Peace** meeting in Davos reveals the personalization of diplomacy as a structural feature of predatory interdependence and operationalizes the manufactured debt logic at multilateral scale:<sup>17</sup> Peace, like security, is reframed as a service provided by President Trump personally, creating obligation in recipients and legitimizing extraction as the price of continued provision. The Board of Peace represents a structural innovation in the manufacture of legitimacy. By recruiting leaders of smaller and dependent states as signatories, many of whose participation signals alignment with Washington's terms rather than genuine peacebuilding, the Board creates a simulacrum of multilateral consensus while bypassing the institutions and procedural safeguards through which genuine multilateral consent is built. Its Gaza component, for instance – in which the displacement of a civilian population was reframed as urban redevelopment – illustrates the model at its most explicit: normative demolition presented as humanitarian initiative. The Board explicitly competes with and displaces existing multilateral frameworks, the UN Security Council, the OSCE, the G7, which is normative demolition in institutional form. For Ukraine, the Board's Ukraine component, with Steve Witkoff as lead negotiator, embeds the minerals deal logic directly into the peace process architecture: Access to American mediation is conditioned on economic concessions to a specific network of U.S. investors, highlighting the administration's strategic intent: to negotiate wars, conflicts, and settlements on its own terms, through a body it controls, to make European exclusion from that process appear as European irrelevance rather than American unilateralism.

#### **4. European Responses: Fragments of a Strategy**

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##### **The EU: Regulatory and Treaty Architecture Under Pressure**

Contrary to other policy areas where the EU is lagging behind, the European Union possesses the most developed regulatory and counter-FIMI regulatory architecture in the world, such as the DSA and DMA, the FIMI Task Force and Toolbox, the Code of Practice on Disinformation. The European External Action Service has developed the most comprehensive analytical framework for FIMI threat assessment available to any democratic institution, publishing annual threat reports that document the infrastructure, tactics, and actor ecosystems of Russian and Chinese information operations. Its FIMI Task Force and the associated Code of Practice represent genuine institutional innovation. The gap between this analytical capacity and the political will to act on its findings is itself diagnostic: The EEAS can name the threat with precision; EU member states cannot agree on a response that accepts the diplomatic costs of acting on that precision. The problem is not design but enforcement. U.S. experts describe with frustration a posture of deliberate de-escalation: The DSA is being implemented less aggressively than its mandate permits, not for procedural reasons but to avoid U.S. retaliation. The result is a compliance facade without deterrent effect, an architecture that exists on paper and retreats in practice. EU diplomacy more broadly has adopted a similar posture of self-restraint across policy areas, driven by a fear that open confrontation with U.S. interests risks triggering complete military disengagement. This calculus is understandable but strategically self-defeating: It rewards the coercive logic of predatory interdependence rather than disrupting it.

The EU's counter-FIMI civil society infrastructure faces a compounding structural problem. As one senior expert observes, the DSA's design incentive has redirected civil society organizations toward evidence collection for tech policy litigation rather than toward developing strategic responses to state-level FIMI actors. The EU's regulatory architecture is currently oriented toward procedure, compliance, documentation, and the enforcement process rather than toward deterrence of the threat it was built to address.

The DIMI dimension of this challenge has evolved in sophistication and physical reach. What began as online disinformation, fake accounts, paid influencers, AI-generated content, deepfakes, and government officials amplifying conspiracy theories has expanded into physical subversion. Germany has documented sabotage of

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<sup>17</sup> On the minerals deal and the peace board's financial architecture, see also: Trump, D.J., Remarks at the inaugural Board of Peace meeting, Davos, 22 January 2026 [B + C]. Senate Democratic Leadership archive: <https://www.democrats.senate.gov/newsroom/trump-transcripts/transcript-president-trump-delivers-an-address-at-the-first-board-of-peace-meeting-in-davos-12226>.

critical infrastructure with links to state-adjacent actors; Poland has faced instigated protests and bribery operations targeting political figures; Romania's 2024 Presidential election was disrupted by an illegally coordinated AI-driven TikTok campaign that the Constitutional Court annulled after VIGINUM and EEAS analysis documented its foreign-linked architecture. Hungary's systematic abuse of state media for domestic information control, and Slovakia's NGO law, modeled on Russian legislation designed to delegitimize civil society, illustrate how DIMI increasingly operates through legal and institutional instruments as well as covert ones. The tactical repertoire has shifted from persuasion to degradation: The goal is not to convince but to exhaust, to make coherent democratic deliberation structurally impossible.

On defense financing, the SAFE program's 150 billion euro headline figure represents a significant political step but falls well short of the fiscal instrument Europe's strategic moment requires, and its implementation is too slow (with the first 38 billion euros in defense investments approved by the Commission only in February 2026).<sup>18</sup> The more fundamental critique, offered by many U.S. experts, is cultural: European foreign policy remains primarily economic in its operating logic, without the strategic culture necessary to convert economic weight into security commitments. As one expert put it bluntly, the EU is "sleepwalking, it only acts when there is urgency, and it entirely lacks the strategic spirit."

Yet, this sleepwalking is structurally enforced. The unanimity rule in foreign policy, combined with the deepening politicization and polarization of EU institutions, prevents the treaty reforms and collective decisions that the moment demands. The consequence is a gradual erosion of the EU's credibility as a counterweight to other hegemonic powers, and a corresponding reversion by member states to national-interest calculations. Spain's refusal to grant U.S. access to the joint military bases at Rota and Morón in the context of the Iran war illustrates this dynamic clearly: a bilateral sovereignty assertion, politically coherent from Madrid's perspective, that simultaneously reveals the depth of European fragmentation and the EU's inability to translate collective interests into a collective position. What the Spain-U.S. rift also exposes is a failure of European strategic communication: While security and defense dependency on the United States remains a fundamental constraint on European autonomy, European governments have not yet developed either the internal consensus or the external messaging architecture to articulate, and bargain on the basis of, what U.S. strategic interests in Europe actually require the United States to do, regardless of this administration's preferences. In a context of mounting far-right pressure across member states and within the European Parliament itself, strategic communication, one that offers citizens a credible account of what the EU is capable of and what it is actively doing to defend their interests, is no longer a secondary concern. It has become a prerequisite for the EU's political survival as a meaningful actor.

### **Germany: The Zeitenwende Gaps**

Germany now sits at the center of Europe's strategic response. The *Zeitenwende* announced by Chancellor Scholz in February 2022 created a rhetorical and legislative commitment to defense transformation that has not yet materialized in practice. The implementation gap operates across three dimensions: public accountability, with approximately 71 percent of the German population believing the state is not doing enough to implement the *Zeitenwende*, supporting the policy's direction but finding its execution insufficient; institutional, with Germany lacking a coherent foreign policy strategy for the current moment; and discursive, with strategic communication reform stalled. Public legitimacy remains structurally fragile: While a majority of Germans now support increased defense spending in the abstract, surveys consistently show that a majority simultaneously oppose cuts to social spending to fund it, favor a negotiated settlement in Ukraine, even at territorial cost. Trust in the United States as a reliable alliance partner, meanwhile, stood at just 41 percent in 2025, down 21 percentage points since Trump's

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<sup>18</sup> European Commission, "EU approves €38bn in first defence investments under €150bn SAFE scheme," *Euronews*, 11 February 2026. <https://www.euronews.com/my-europe/2026/02/11/eu-approves-38bn-in-first-defence-investments-under-150bn-safe-scheme>.

re-election.<sup>19</sup> The Scholz government's communicative failures on defense, criticized by U.S. and EU experts alike, compounded the problem and have not yet been corrected under the government of Chancellor Friedrich Merz.

Germany's trade leverage remains its most credible instrument and its most underused one. Counter-tariff capability, DMA enforcement (which is, notably, strongly supported by U.S. firms and therefore gives Germany genuine leverage), and the precedent set by Canada's withdrawal from F-35 contracts are all available as tools. The Draghi and Letta reports provide a ready-made institutional framework for EU-level fiscal reform. The gap is not analytical capacity but political will, specifically, the will to accept short-term friction with Washington in exchange for long-term strategic credibility.

The price of these communicative and policy failures is measurable in electoral terms. In two consecutive Länder elections in March 2026, the Alternative for Germany (Alternative für Deutschland, AfD) nearly doubled its results in both states: 18.8 percent in Baden-Württemberg on March 8, up 9.1 points from 2021, and approximately 20 percent in Rhineland-Pfalz on March 22, also more than doubling its previous result. In Baden-Württemberg, the SPD recorded its worst-ever result in a state election since 1945, collapsing to 5.5 percent; in Rhineland-Pfalz, the party lost approximately 9 points and ceded government to the CDU after 35 years in power. Exit polling points to the same structural dynamic in both states: The AfD has consolidated itself as the party of the working class, with around 37 percent of workers voting AfD in Baden-Württemberg, while the SPD has hemorrhaged its traditional base to a party whose rise is facilitated by the MAGA network activation that predatory interdependence is designed to produce.<sup>20 21</sup> These are not protest votes that will self-correct, they reflect a failure of governing parties to offer a credible account of German security, economic, and sovereignty interests at precisely the moment when that account is most urgently needed.

**France's strategic trajectory** differs from Germany's in ways that are analytically important. The French defense industry is the least Americanized in Europe, providing procurement independence that no other major European power can match. Its nuclear posture has historically been the most explicitly autonomous. And French President Emmanuel Macron's nuclear policy announcement in March 2026, delivered 48 hours after the outbreak of the Israel-U.S. war on Iran, marks a significant structural break: By explicitly committing French nuclear deterrence to the collective defense of European partners, President Macron made the first credible move toward a European security architecture and an alternative to Article 5 conditionality, and the first time since the Cold War that a European power has offered a credible extended deterrence alternative to the U.S. nuclear umbrella.<sup>22</sup> Eight European countries signaled initial interest in the framework; Germany, at Merz's initiative, had already opened confidential discussions.

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<sup>19</sup> 71% of Germans believe the state is not doing enough to adapt to the changed security situation, while only 18% consider the measures taken sufficient. See Munich Security Conference, "After the End of Certainties: Public Opinion on the Zeitenwende," October 2025. <https://securityconference.org/en/publications/analyses/after-the-end-of-certainties-public-opinion-on-the-zeitenwende/>. Separately, the Security Radar 2025 report found that while 54% of Germans agreed defense spending should increase, 36% opposed it, and 53% favoured a negotiated settlement of the Ukraine conflict even if Ukraine had to sacrifice territory (Security Radar 2025 findings cited in: *Responsible Statecraft*, <https://responsiblestatecraft.org/germany-defense-increase/>). The Bundeswehr's own survey (April–May 2025) found 64% of the population support increased defense spending but also that trust in the U.S. as a reliable alliance partner had dropped by 21 percentage points since Trump's re-election, now standing at 41%. Bundeswehr Centre for Military History and Social Sciences, *Bevölkerungsbefragung 2025*, April–May 2025. <https://zms.bundeswehr.de/de/publikationen-ueberblick/bevoelkerungsbefragung-2025-deutschland-fuehungsrolle--5990790>.

<sup>20</sup> On AfD-MAGA alignment, see Pohl, I., *Deutsche Welle*, <https://www.dw.com/en/germanys-afd-courts-maga-at-ny-gala/video-75171495>; and Shekhovtsov, A., "From Moscow to MAGA," *Shekhovtsov's Substack*, <https://shekhovtsov.substack.com/p/from-moscow-to-maga>.

<sup>21</sup> Baden-Württemberg official results, 8 March 2026: <https://www.landtag-bw.de/de/aktuelles/themen/landtagswahl-2026>. Rhineland-Pfalz results, 22 March 2026: <https://de.euronews.com/2026/03/22/Rhineland-pfalz-wahl>. AfD doubling analysis: <https://www.amadeu-antonio-stiftung.de/verdoppelt-und-trotzdem-kein-durchbruch-was-das-afd-ergebnis-in-baden-wuerttemberg-wirklich-bedeutet-162031/>.

<sup>22</sup> For analysis of the speech as a structural break in French nuclear posture see: Jaques-Apke, A. and Wojtowicz, L., "A European Nuclear Deterrent: The Risks and Benefits to Macron's Pitches to Europe," *War on the Rocks*, 2026 [forthcoming].

The challenge is institutionalization. French extended deterrence is credible as a statement of intent; its operational value depends on whether other member states can be anchored into a framework that gives the commitment strategic depth and political legitimacy beyond Paris. This requires the Franco-German axis to function, and that is precisely where the current moment is most uncertain. This year, Franco-German relations have reached their highest tension since Merz took office. The fault lines are structural rather than personal. On defense industrial cooperation, Merz publicly questioned the future of the SCAF, the Future Combat Air System, the flagship Franco-German-Spanish joint fighter program that embodies bilateral industrial interdependence, citing unresolved tensions between Dassault and Airbus. On trade, Merz backed the Mercosur agreement over French objections, and resisted Macron's "Buy European" industrial sovereignty agenda. On economic governance, German resistance to Eurobonds and joint fiscal instruments clashed with the French vision of an economically assertive EU.

The divergence between France and Germany on counter-FIMI strategy extends beyond institutional architecture into doctrine and it reflects the deeper strategic divergence described above. France has built the most operationally assertive counter-FIMI posture in Europe in a short time. The VIGINUM agency, established in 2021, was designed explicitly for public attribution of foreign information manipulation, including from allied states. France has a working doctrine of public friction with allied actors when French sovereignty is at stake: Call it out, name the source, absorb the diplomatic cost.<sup>23</sup> The "French Response" model – public identification, governmental rebuttal, and institutional counter-narrative – treats information sovereignty as a dimension of national sovereignty that admits no exceptions for alliance membership.

Germany has chosen the opposite doctrine. Berlin does not publicly attribute FIMI to state actors, allied or otherwise. The BfV (Bundesamt für Verfassungsschutz) and BND (Bundesnachrichtendienst) operate in the counter-FIMI space, but the political decision has been to avoid public confrontation with named sources, to rely on civil society and platform-level responses rather than governmental attribution, and to treat information operations as a law enforcement or regulatory matter rather than a strategic one. France has chosen to respond publicly to most cases of U.S. interference in its domestic political debate, what one expert described as the contrast between a French government that publicly attributes and rebukes, and a German government that has decided "not to jump over every stick."

The two approaches reflect the same underlying divergence that runs through the whole Franco-German relationship at this moment: France treats European strategic autonomy as an active project requiring assertive choices, including friction; Germany treats it as a desirable destination to be reached without disrupting the transatlantic relationship. In the informational domain as in the nuclear one, France has moved first. The question is whether Germany follows. These are not merely tactical differences; they represent different diagnoses of what the European security crisis requires.

There is also a temporal constraint that does not favor patience. Most importantly, by summer 2026 France will be consumed by the 2027 Presidential election campaign, closing the window for large-scale European political projects. A Franco-German axis that spends its managing bilateral tensions over SCAF and Mercosur, rather than institutionalizing Macron's nuclear commitment and building the European defense architecture that the five-to-

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<sup>23</sup> Notable cases of U.S. interference in French domestic politics that triggered official responses: (1) the U.S. State Department's framing of activist Quentin Deranque's death (February 2026), amplified by the U.S. Embassy in Paris, led Foreign Minister Barrot to summon Ambassador Kushner and restrict his government access after repeated non-compliance: France 24, <https://www.france24.com/en/france/20260223-france-curtails-us-ambassador-kushner-s-access-after-he-fails-to-obey-government-summons>; CNN, <https://www.cnn.com/2026/02/22/europe/france-bans-us-ambassador-deranque-death-latam-intl>. (2) Coordinated statements by Trump, Vance, and Musk following Marine Le Pen's conviction, March 2025: France 24, <https://www.france24.com/en/americas/20250404-marine-le-pen-jd-vance-not-democracy-minor-charge-usa-france-donald-trump>.

eight-year reconstitution window demands, will have squandered the most consequential strategic opportunity Europe has had since 1989. In this sense, Merz risks something more damaging than the Scholz government: delivering sufficient bilateral harmony to mask the underlying strategic divergence, while the window closes and no European leader will be able to lead urgent reforms and new policy arrangements.

## 5. Five Core Findings

The analysis produces five core findings that structure the policy recommendations in the following section.

**Finding 1: Structural break, not an episode.** U.S.-European divergence on territorial integrity is driven by ideological, informational, and institutional forces that will outlast any single administration. Interviewees across the political spectrum identified this as a qualitative change in the relationship, not a cyclical downturn.

**Finding 2: FIMI as coercive statecraft, a new category.** FIMI does not operate in a vacuum: Foreign influence succeeds where domestic actors amplify it. In practice, external operations and local political forces interact to weaken institutions, erode civil society, and disproportionately target women and marginalized groups.<sup>24</sup> This dynamic reflects a broader shift toward geopolitical competition in which authoritarianism and disinformation are resurging. The U.S. case is distinct: Unlike Russian or Chinese FIMI, it is both state- *and* privately directed, operates within a formal alliance also through domestic actors within allied states, and specifically targets the regulatory infrastructure designed to defend against foreign interference. This complicates attribution and makes countermeasures more politically costly.<sup>25</sup> Attribution is complicated because the conduct occurs through legitimate channels, official speeches, named political figures, and commercially dominant platforms. There is no covert network to expose, no fake account to take down, no foreign agent to designate. Naming a formal ally as a FIMI actor requires invoking the same regulatory and diplomatic frameworks designed for adversaries, at the risk of being accused of conflating the two. Countermeasures are more politically costly for the same reason – applying DSA enforcement against U.S. platforms, publicly attributing interference to Washington, or designating MAGA-aligned foundations as foreign agents all carry a diplomatic cost, potential military disengagement, trade retaliation, loss of intelligence cooperation – that no European government currently has the political mandate to absorb. The asymmetry is structural: The cost of acting is borne by the target; the cost of not acting accumulates invisibly, through electoral results.

U.S. FIMI targeting European counter-FIMI initiatives constitutes a novel form of coercive statecraft. Critically, it is not optimized for U.S. national interest as conventionally understood, but for the financial and political interests of a specific MAGA-aligned network, the distinction that separates predatory interdependence from ordinary great-

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<sup>24</sup> On global stories in countering and addressing FIMI through the analysis of case studies, consult the new report of International IDEA International IDEA, *Resisting Foreign Information Manipulation and Interference: A Stress Test for Democracies*, 2025. <https://www.idea.int/publications/catalogue/resisting-foreign-information-manipulation-and-interference>. Council of Europe, *Strengthening Resilience to FIMI in Eastern Europe and the Western Balkans*, IRIS Extra, 2025. <https://rm.coe.int/iris-extra-2025-strengthening-resilience-to-fimi-in-e-europe-w-balkans/488029863a>.

<sup>25</sup> It is analytically important to distinguish U.S. from Russian FIMI, though both are active threats to European democratic agency. Russian FIMI operates through concealment (fake accounts, manufactured personas, state-sponsored media presented as independent outlets (RT, Sputnik), and covert amplification networks such as Doppelgänger and Portal Kombat, documented in successive EEAS FIMI threat reports: [https://www.eeas.europa.eu/eeas/information-integrity-and-countering-foreign-information-manipulation-interference-fimi\\_en](https://www.eeas.europa.eu/eeas/information-integrity-and-countering-foreign-information-manipulation-interference-fimi_en)). The goal is destabilisation: to deepen polarisation without traceable attribution. U.S. FIMI under the current administration operates largely in the open, through official government channels, named political figures, and commercially dominant platforms, which makes it harder to counter precisely because it cannot be dismissed as covert interference. Vance's MSC speech, Musk's public endorsements of far right parties in the EU, and the State Department's pressure on the DSA are FIMI operations conducted in daylight. The EEAS, which has developed the most comprehensive European analytical framework for FIMI threat assessment, has to date focused primarily on Russian and Chinese operations; the institutional and political challenge of applying the same framework to an allied state's conduct remains largely unaddressed.

power competition. The most recent example is the direct interference of the U.S. government and MAGA networks into the Hungarian elections in April 2026, in what is likely to be EU's most consequential election of the year.<sup>26</sup>

**Finding 3: The Zeitenwende gap is real and widening.** Germany's Zeitenwende remains rhetorically committed but institutionally stalled. U.S. FIMI operations are actively exploiting this gap through AfD amplification and domestic polarization. Germany currently lacks the coherent foreign policy strategy its size and position require.

**Finding 4: The five-to-eight-year window is the structural constraint.** Russia's military reconstitution timeline defines the urgency of European action. Appeasement strategies that defer hard choices risk exhausting this window.

**Finding 5: New French nuclear policy is a strategic inflection point.** The new French nuclear policy represents the first real European attempt to provide an alternative collective-security guarantee to the eroding U.S. commitment. Its deterrent credibility depends on rapid institutionalization, specifically, on whether Germany and Poland can be brought into a credible extended deterrence framework before the reconstitution window closes.

## 6. What Does Not Work

Before turning to recommendations, this research identifies four strategies that the evidence consistently suggests are counterproductive.

**Appeasement mode** – implementing regulatory frameworks less aggressively, making unilateral concessions on SAFE or defense procurement, and avoiding confrontation on technology regulation – sends the wrong signals simultaneously to Washington and to European far-right parties. It rewards the informational security dilemma rather than disrupting it. One interviewee offered the pointed observation that the AfD was a Russia-sympathizer party, now aligning with MAGA. Populist parties are opportunistic and will align again with whoever serves their interests. The same opportunist logic applies to the U.S. itself in its current configuration.

**Bilateral flattery** as diplomacy, the logic of managing the relationship through leader-to-leader proximity and concessions, is described by one interviewee as a strategy that “makes future meetings worse,” not better. It substitutes for strategic engagement rather than enabling it.

**Waiting until 2028**, the posture of holding one's breath until the next U.S. midterm elections, ignores the five-to-eight-year reconstitution window and allows FIMI operations to continue eroding European political space. Each month of inaction narrows the available options.

**Information warfare (as)symmetry:** European democracies face a genuine dilemma. As U.S. and Russian FIMI postures grow more assertive, the needs for better strategic communication, counter-narratives, state-directed bots, or parallel amplification infrastructure grow accordingly. The prior task is not symmetry but enforcement: The DSA, VIGINUM-model attribution, and platform accountability frameworks represent a deterrent architecture of genuine potential that Europe systematically fails to deploy.

## 7. Policy Recommendations

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<sup>26</sup> See the Guardian: Trump lauds Viktor Orbán as Europe's far-right leaders gather in Budapest, *The Guardian*, “Trump lauds Viktor Orbán as Europe's far-right leaders gather in Budapest,” 22 March 2026. <https://www.theguardian.com/world/2026/mar/22/trump-lauds-viktor-orban-far-right-leaders-gather-budapest>.

## European Union


- Enforce the DSA assertively. Treat enforcement as a deterrence signal, not a technical compliance exercise. Stop the “big show without follow-through” dynamic.
- Reframe SAFE as a fiscal and regulatory budget instrument at the EU level, not a procurement list. Scale it to match the strategic requirement, not the lowest common denominator.
- Build FIMI attribution capacity independent of U.S. cooperation. Invest in national agencies modeled on the French VIGINUM at the member-state level and coordinate them at the EU level.
- Develop European platform alternatives and enforce existing data sovereignty frameworks. Reducing algorithmic dependence on U.S. tech infrastructure is a prerequisite for genuine information sovereignty.
- Use economic leverage credibly. Counter-tariff capacity and DMA enforcement are Europe’s strongest available short-term instruments.
- Develop alternatives to a stalling European Integration process: Coalitions of the willing are the short-term solution until other arrangements can be found.

## Germany

- Close the Zeitenwende gap through institutional accountability mechanisms, not rhetorical reaffirmation. Tie security commitments to measurable outcomes.
- Invest in strategic communication reform. Move from reactive debunking to proactive narrative architecture. The risk of amplifying disinformation through institutional response requires a more calibrated StratCom doctrine.
- Use F-35 alternatives and DMA enforcement as credible leverage signals toward Washington rather than as threats to be avoided.
- Strengthen the France-Poland-Germany triangle as the load-bearing European security structure for the period in which U.S. commitment is uncertain.

## Transatlantic Relationship

- Identify and engage with credible counterparts in the U.S. Congress, state governments, and civil society. The administration is not the whole of American politics.
- Build cross-Atlantic democracy support infrastructure independent of U.S. government funding, EU-funded, civil society-led, institutionally durable.
- Frame European assertiveness as protecting shared interests, not as anti-Americanism. The Canadian precedent demonstrates that resistance is politically viable even for highly exposed partners.
- Accelerate new trade partnerships (Mercosur, Canada, Japan, South Korea) to reduce structural dependence on U.S. market access as a point of leverage.

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- Actively support the institutionalization of Macron's nuclear posture commitment by bringing Germany and Poland into extended deterrence consultations.

## 8. Conclusion: The Question Europe Has Not Yet Asked

“Der Kaiser hat keine Kleider.”<sup>27</sup> The observation, offered by a policy expert in Washington, DC, to describe Russia’s systematic erosion of U.S. superpower credibility through communicative warfare, applies with equal force to the current transatlantic moment. Territorial (dis)integrity and the informational security dilemma are not a diplomatic misunderstanding to be resolved through better communication or bilateral flattery. They are a structural condition produced by predatory interdependence: the deliberate exploitation of European dependencies, built over 70 years of transatlantic partnership, as coercive instruments against Europe’s own political agency.

Europe has the instruments to respond: the DSA, trade leverage, the Draghi and Letta frameworks, nascent European defense industrial capacity, and since March 2026 a French nuclear commitment that opens the door to a genuinely European security architecture. What it has lacked is the political will to enforce these instruments, the strategic communication coherence to project a credible counter-narrative, and the institutional speed to act within the window that Russian military reconstitution imposes.

But there is a question Europe has not yet asked with sufficient urgency: Who is next? The foreign policy analysis evidence in this report describes a pattern, not a series of isolated decisions. Greenland challenged an ally’s territorial sovereignty. Venezuela demonstrated regime change without UN authorization and without a congressional mandate. Iran normalized unilateral military strikes on sovereign nuclear programs. Ukraine is being used to establish that security guarantees are transactional commodities. The pattern is consistent and accelerating. Cuba, whose regime the Trump administration regards with the same combination of contempt and opportunity as Venezuela, sits on a trajectory that the Venezuela precedent has made more rather than less likely. More pressingly for Europe: the Western Balkans, where Russian influence operations are active and EU enlargement is stalled; Georgia, where democratic backsliding has already occurred with limited European response; and Moldova, where the five-to-eight-year reconstitution window closes fastest. The question is not whether this logic will reach Europe’s neighborhood; it already has, through the Ukraine process. The question is whether Europe will recognize it in time.

The structural answer to this question requires Europe to develop a new agenda on territorial and transatlantic questions, and to do so under a fundamental institutional constraint that this report cannot resolve but must name. The EU’s foreign policy unanimity rule means that every significant European external action requires the agreement of all 27 member states. This is not an abstract procedural problem: It is the main mechanism through which Washington has historically, and the Trump administration now systematically, exploited EU fragmentation. Member states are approached bilaterally, offered bilateral inducements, and pulled away from EU-level consensus before that consensus can form. The informational security dilemma operates through this mechanism: Far-right network activation in individual member states is designed precisely to produce the domestic political pressure that prevents the national governments in question from participating in EU-level counter-responses. Reforming the unanimity rule or developing credible coalitions of the willing as functional substitutes is therefore not a constitutional footnote. It is a prerequisite for effective European strategic autonomy and for the territorial order that autonomy is meant to defend.

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<sup>27</sup> “Der Kaiser hat keine Kleider” — “The Emperor Has No Clothes” — is a reference to the fairy tale by Hans Christian Andersen (*Kejserens nye Klæder*, 1837), in which an emperor parades in clothes that do not exist, and an entire court pretends otherwise until a child states the obvious. The analogy captures two dynamics central to this report’s argument: the gap between what European officials privately acknowledge about the erosion of U.S. credibility and what they are institutionally positioned to say publicly; and the function of independent analysis in naming structural realities that the politics of alliance management systematically prevents from being named. The observation was offered by a Washington-based policy expert specifically in reference to Russia’s strategic use of communicative warfare to hollow out the normative authority of U.S. leadership — a dynamic that, this report argues, the Trump administration has since accelerated from within.

The five-to-eight-year window is real. The pattern of predatory interdependence is documented and accelerating. Whether European institutions can act with sufficient coherence and speed, overcoming both the unanimity constraint and the informational erosion of domestic political agency that predatory interdependence is designed to produce, is the defining question of the current moment for the transatlantic relationship and for the territorial order it was built to defend.

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### **About the Author**

Amélie Jaques-Apke is a political scientist specializing in global security, geopolitics, and radical populism. She is the founder and managing director of the Young Security Conference, a transatlantic policy platform focused on international security and strategic dialogue. She holds a PhD in International Politics from the Jean Monnet Centre in Salzburg, with research on the impact of populism on public policy in Europe and the Americas. Her academic work is complemented by research and leadership roles at institutions including Columbia University, the American University School of International Service in Washington, DC, and EuropaNova in Paris. Her experience spans policy research, conference organization, and transatlantic engagement, including initiatives linked to the Munich Security Conference. She has also taught at SciencesPo Paris and worked with EU and government institutions in Europe and the United States. She holds an M.A. and B.A. in International Security and EU Studies from SciencesPo Paris and King's College London. She is fluent in German, French, English, and Spanish, with additional proficiency in Italian and Portuguese.

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