

## BREAKING THE MOLDS OF GEOPOLITICAL EUROPE

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*In the context of growing transatlantic divergence—and internal division within the EU between integrationists and advocates of a Europe of nations—differentiated integration at various speeds can help unlock reforms and mechanisms for a geopolitical Europe with greater capacity in security and defense.*



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There are crises that happen suddenly—Lehman Brothers, pandemics, or wars—that are met with extraordinary measures. And there are attritional crises, where the foundations of our system gradually and structurally erode. We struggle to react to the latter. This is the case with the current subversion of the international order and the transatlantic divide with Donald Trump’s return to the White House. Trump’s “MAGA” language is present within the European Union thanks to the promoters of “MEGA,” Make Europe Great Again. Trump is also a leader in Europe, which explains why many hesitate between caution, resignation, or the desire to please the U.S. president, even though everyone is aware of the systemic erosion he represents for the established order.

The world’s largest alliance of democracies is giving way to a deep transatlantic divergence. Its latest expression was the humiliation of Volodymyr Zelensky by Trump and his vice president, J.D. Vance, at the White House, in contrast with the support he received days earlier during a visit by several European leaders to Kyiv. The transatlantic rift is also reflected in international institutions such as the United Nations and the G-7. The United States voted alongside Russia and China on a U.N. Security Council resolution on Ukraine that avoided mentioning Russian aggression and territorial integrity. France and the United Kingdom refrained from vetoing it, but earlier, Europeans, together with Ukraine, had promoted a General Assembly resolution condemning Russia’s aggression, which was opposed by both Moscow and Washington. In the G-7, the group of the world’s most advanced economies, the Trump administration refused to include a reference to Russian aggression in the communiqué marking the third anniversary of the war.

Two opposing visions of Europe’s future coexist within the EU today. One, fueled by Trump’s national-populist leadership, seeks to dismantle European integration by returning Brussels’ powers to national capitals. This is the Europe of nations and patriots, which would like to see the EU

reduced to a mere dispenser of funds— a Europe without political soul or a desire for unity. The other is the Europe that advocates for further integration as the only way to act in a world of giants. It is the Europe of Mario Draghi, Sauli Niinistö, and Enrico Letta, of those calling for progress in competitiveness, security, and defense, or for completing the single market. For this Europe, threatened by the spheres of influence of Washington, Beijing, and Moscow, and by Trump’s diplomatic approach, windows of opportunity will open.

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Many countries in the pluralistic Global South, starting with India—chosen by European Commission President Ursula von der Leyen as the first destination of her second term—will reject being part of any sphere of influence. They will seek models that structure international relations differently and will share with the EU a desire for non-alignment if the rift with the United States continues to widen. The EU will need to foster alliances with these countries based on intertwined interests. Institutionalizing these relationships is unlikely to lead to a commitment to new global governance. However, effective multilateralism that promotes the management of certain global public goods could emerge. If the United Nations played a role in the Black Sea Initiative, it was not due to its ability to promote peace between Russia and Ukraine but because of its contribution to preventing a global food crisis resulting from restrictions on Ukrainian grain exports.

Internally, if the division between integrationists and supporters of the Europe of nations becomes the new structuring element of European politics, innovative formulas will be needed to advance geopolitical Europe. Progress in foreign policy, security, and defense will likely have to take place outside familiar frameworks, inevitably generating tensions among countries and political forces advocating for “more Europe.”

Differentiated integration may become an inevitable solution. Politically, because an alternative majority in the European Parliament could already block the legislative process, as the Patriots group desires, if the center-right aligns with this approach. Also, because countries governed alone or in coalition by political forces of the Europe of nations may form a blocking minority in the Council, especially if France joins them. Procedurally, advancing at different speeds in strengthening joint mechanisms will be the only way to pull the EU out of stagnation. The euro and the freedom of movement within the Schengen Area are paradigmatic examples of multi-speed European integration. Measures like the European Fiscal Compact during the economic crisis and Next Generation EU during the pandemic went beyond what the treaties allowed in the former case and what they anticipated in the latter.

In security and defense, however, efforts to integrate the disparate state resources have always fallen on deaf ears. There has been no shortage of proposals: Permanent Structured Cooperation (PESCO), the European Defense Agency, the EU's Operational Headquarters, the European Defense Industrial Strategy, the Strategic Compass... European defense is perhaps the most over-diagnosed and under-implemented EU policy.

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PESCO, for example, aimed to establish a cooperation framework in which member states would progressively align their defense capabilities to form a joint force package complementary to NATO. The initiative has turned into a parallel cooperation scheme to the EU's security and defense policy, involving all member states except Malta, yet it has not contributed to the integration of defense resources or the interoperability of European armies.

The litmus test for the future of European security and defense will be the negotiations on Ukraine following Trump's initial snub of Zelensky and the EU. The security guarantees that Europeans agree upon (ideally supported by the Americans) will be structured around a coalition of willing and capable states. The Franco-British initiative following the Paris and London summits points in this direction.

Europe must also commit to a long, complex, and comprehensive process for negotiating peace between Russia and Ukraine. The EU will be essential for Ukraine's reconstruction and its accession prospects. But innovation will be necessary here too: if enlargement remains subject to the unanimous opening and closing of negotiation chapters, EU membership will be unattainable. Ukraine's accession should be gradual, allowing progressive access to European policies, funds, and institutions, avoiding an all-or-nothing approach.

The EU cannot be geopolitical without first equipping itself with innovative mechanisms for integration, decision-making, security, and defense policies, as well as capabilities and resources. The Commission has proposed financing European defense and Ukraine, but the major step forward for geopolitical Europe still awaits the verdict of member states. Trying to advance solely within a Union whose purpose is not shared by several capitals will result in Europe's paralysis as an international actor. And that would be an undeserved victory for Trumpism.