

# DGAP REPORT

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## The First ~~100~~<sup>90</sup> Days of Trump 2.0

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## FOREWORD

No one can deny that US President Donald Trump got off to a flying start in January. Trump himself claims that he has changed more in the first few weeks of his second term than other heads of state and government have during their entire tenures. There is some truth in that.

However, it is worth taking a closer look at what exactly Trump has changed in his fast and furious early days in office. Observers are becoming ever more breathless. One must constantly run to the news media or the internet to avoid missing the latest turn of events, to make time for another round of what-did-he-do-this-time.

Given this punishing pace, it is necessary to take a step back and look at the changes in context. Which is precisely what this DGAP publication aims to achieve: to collect and analyze information; to reveal political and historical connections and to evaluate them.

Foreign policy and geoeconomic policy are the core issue areas of this collection. Yet, it would be difficult to assess the early days of Trump 2.0 without examining elements of domestic policy. First, there is Trump's attempt to downsize, weaken, or completely dissolve federal institutions. Further, there is his willingness to circumvent the law, sometimes even constitutional law, by issuing executive orders. On average, a federal judge has been stepping in against an element of Trump's flood of executive orders every four days for several weeks. For some analysts, they are clear transgressions of presidential authority; for others, they are tolerable moves within the scope of presidential executive power.

What Trump does within the United States also affects the rest of the world – starting from migration policy and not ending with climate policy. Yet, his domestic agenda does not translate into the political reality of other nations as directly as the new foreign policy that Trump and his team have been presenting to a perplexed world since January 20, 2025. Who would have predicted the new president to preach hemispheric imperialism instead of strength through alliances? Who would have thought he would find the concept of zones of influence more convincing than that of territorial integrity? And although a withdrawal of US support for Ukraine was foreseeable even before the election, it was by no means on everyone's cheat sheet that Trump would seek an alliance reversal and partnership with Russia at the expense of Ukraine and Europe. That he would prefer punitive tariffs to free and regulated trade and demand increased defense spending from the Europeans, though, was to be expected.

Europeans will likely react to this policy, as will all others who are affected by it. But before a reaction comes, we offer an initial assessment. After 90 days. Here, on these pages.



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# Radical Washington Introduces Itself to the World

The first 100 days in office have been a symbolic early benchmark for US presidents since the time of Franklin D. Roosevelt. In his first months, FDR pushed through an unprecedented wave of legislation to combat the Great Depression, including 15 major bills. He thereby set a standard for swift governmental action that has remained unmatched – except, according only to Trump and his devoted followers, by Donald Trump in his second term.

Trump launched his second administration intending to create the impression that he is acting at an unparalleled pace and volume. Indeed, the pace of executive orders has been frenetic. Not so, however, the pace of legislation. Notably, despite Republican majorities in the US Senate and House of Representatives, few laws have yet been passed, much less a proper budget. Given the shotgun blast of norm-busting, anti-bureaucratic actions in the early months of what Trump is calling a “common sense revolution,” it makes sense to abandon and shorten the traditional benchmark of 100 days. In this report, DGAP adopts the administration’s own framework of a [90-day review](#) as ordered by Russel Vought at the Office of Management and Budget.

Nothing about the second Trump administration is politics as usual. Yet, as shocking as much of the early actions and statements have been to Washington’s European allies, there were many warnings and notable precursors. As many predicted, Trump’s second term has been much more Trumpian. Having survived an assassination attempt, convictions, and impeachments to win a more resounding electoral

victory, Trump is emboldened. He is also unleashed – no longer constrained by a more traditional cabinet and staff and fears of Congressional revolt. Close observers will remember that Trump made overtures to acquire Greenland during his first term. However, adding Canada to his wish list of territorial acquisitions, as he has done in his second term, is an example of the new audacity of Trump 2.0.

## REGIME CHANGE: AMERICA FIRST MACHTPOLITIK

Trump has reshuffled the traditional coalition of the Republican Party, also known as the Grand Old Party (GOP), in significant ways. Christian conservatives and

### OBJECTIVES AND APPROACH

This report assesses the first 90 days of the Trump 2.0 administration and offers strategies for the new German government and its partners in Europe and beyond. In subsequent chapters, my DGAP colleagues analyze what these 90 days tell us about Trump’s priorities and methods in various policy areas and suggest ways forward. First though, this chapter examines the ideological underpinnings of the new Trump coalition and its foreign policy implications. It concludes with a short summary of key findings and recommendations.

small-government libertarians have long been crucial components of that coalition. What distinguishes Trump's coalition is its unity around a certain version of anti-globalism – or “America-firstism” – and its delight in breaking norms. This coalition is conservatism radicalized. Though there are some disagreements among the anti-globalists around Trump, they all question the central pillars on which US foreign policy has stood since the end of the Second World War. They doubt whether the global leadership of the United States, its commitment to international systems, and the alliances it has built really serve Americans.

Trump has declared an end to benign system hegemony and has instead returned to using pure hegemonic power – might makes right. The Trump coalition is set on both national and international “[regime change](#).” Unlike past GOP administrations, Trump's largely sidelines classic free-market, pro-business conservatives who are affiliated with more traditional industries (Trump's fondness for fossil fuels notwithstanding), along with their more careful, conservative tendencies. Despite the fact that these “globalist” Republicans still account for a large share of Trump's voters and supporters, they – alongside traditional media, academia, and the bipartisan foreign policy establishment – are part of the established “regime” the Trumpian New Right seeks to overthrow.

*Trump has declared an end to benign system hegemony and has instead returned to using pure hegemonic power – might makes right*

## THE CAMPS THAT COMPRISE TRUMP'S COALITION

There are three dominant ideological camps in the Trump administration: the Christian Nationalists, the Economic Nationalists, and the Techno-right. All largely agree on the diagnosis of the old “regime,” but, as I detail below, their visions for its replacement feature important distinctions.

Before I describe them, it is worth noting that Trump himself combines populist nationalism with economic nationalism and the views of a fourth group that is well represented in his cabinet: the unideological opportunists. Trump's FBI director **Kash Patel** and National Intelligence Director **Tulsi Gabbard** are members of this camp. The opportunists are ideologically flexible though they all share a rule-breaking spirit and conspiratorial distrust of the state apparatus and establishment knowledge.

### CHRISTIAN NATIONALISTS

#### Preserving Christian Conservative Culture and National Pride

Christian nationalists have long been an important but somewhat subordinate faction within the Republican Party. They are primarily aligned with the Religious Right, influencing policy on abortion, marriage, and religious liberty, but have often taken a backseat to corporate conservatism and neoconservative foreign policy. With Trump, Christian nationalists – aligning with his populist, America First agenda – gained a more central and assertive role. Secretary of Defense **Pete Hegseth** and Project 2025 architect and now director of the Office of Management and Budget (OMB) **Russ Vought** are influential Trump administration members of this camp. Christian nationalists are not always easy to distinguish from ethnic nationalists. For example, both groups believe that mass immigration, particularly from non-Western or non-Christian countries, undermines America's Christian heritage and accelerates secularization or cultural fragmentation.

### ECONOMIC NATIONALISTS

#### Prioritizing Domestic Industry and Sovereignty over Global Economic Integration

The Trump coalition differs from the coalitions behind past Republican presidencies because it fuses and then centers cultural conservatism, nationalism, and economic protectionism. Economic nationalists prioritize domestic industries, national sovereignty, and protectionist trade policies over global economic integration. They aim to strengthen national economies by reducing dependence on foreign goods, labor, and capital. There are economic nationalists in Trump's orbit – **Steve Bannon**, **Robert Lighthizer**, **Peter Navarro** – who are Christian and culturally conservative (in fact Russ Vought is both an economic and Christian conservative). However, there are also versions of economic nationalism that are left-wing or more nuanced. Take, for example, the national security vision of **Elbridge Colby**, Trump's head of policy at the Department of Defense. Although his vision



places Colby closer to economic nationalists than to free-market conservatives, his calls for reshoring critical industries, reducing economic reliance on China, and bolstering military-industrial capacity are actually similar to policies of the Biden administration. There are important differences in degree and kind between radical economic nationalists who want to use tariffs to remake the US economy and a more targeted, strategic de-risking approach. Yet, both reject the global multilateral free-market economic orthodoxy that once dominated Republican politics.

### TECHNO-RIGHT

#### Driving Anti-regulation, Pro-executive Power, and Anti-system Disruption

The influence of the Techno-right within the Trump administration is exemplified by the roster of Silicon Valley billionaire investors in top administration spots. While **Elon Musk** is the most prominent of these, further examples include **David O. Sacks**, who serves as advisor on AI and cryptocurrencies, and **Stephen Feinberg**, who is second in command at the Department of Defense, reflecting the administration's commitment to integrating advanced technologies into governance. The man orchestrating the rise of the Techno-right from behind the curtain, though, is Silicon Valley founder and investor **Peter Thiel** who has pumped billions into supporting a New Right political scene and seeded **JD Vance's** venture capital firm before backing his political career. Like its thought leader Thiel, the Techno-right is radically libertarian, advocating for policies that prioritize innovation, deregulation, and a redefined approach to US global leadership that emphasizes technological supremacy over traditional diplomatic channels. Yet, this movement departs from libertarianism by supporting an empowered executive – a “CEO president” – and rejecting many progressive social ideas. Tellingly, many of its powerful players, including Thiel and Feinberg, are invested in defense-related tech and supportive of government military spending. However, at the same time, they see Silicon Valley upstarts at battle with traditional defense industry giants.

Importantly, while both nationalist camps have a populist nationalist message that envisages a strong state – i.e., one that can devise robust industrial policy – and distributive and labor policies that benefit working (especially native, Christian) Americans, the Techno-right is elitist. It is interested in capturing global markets and in favor of a small state that stays out of the way of innovators and keeps its hands off the wealth they accrue.

## IMPLICATIONS OF TRUMP'S IDEOLOGICAL COALITION AND KEY TAKEAWAYS

The coalition of these three camps is willing, and even eager, to disrupt the international system and the Western alliance in unprecedented ways to upend the old regime, be it toward goals of radical deregulation or economic sovereignty. Because those affiliated with traditional industries and the security elite are largely sidelined, the Trumpian coalition is ready to accept painful disruption and risk – for example, the kind resulting from blanket global tariffs and tariffs of more than 100 percent against China. However, the biggest uncertainty for the international community comes from Trump himself. None of the three camps outlined above would pursue making Canada the 51st state. Trump's instincts when it comes to international politics are imperialist and utterly norm-free. At the same time, he is capricious and often cares more about appearances than substance. This means that, unlike past US presidents, Trump will not set and maintain a clear, coherent strategy. The policy of the second Trump administration will remain a shuffle between the strategic interests of different coalition members and Trump's instincts and whims.

This means that Berlin will face policy challenges across many fields on or beyond the scale of the *Zeitenwende* of 2022. To address them, the new German government will have to be decisive and limber at the same time. With the combined wisdom of the DGAP experts featured in this report and these key takeaways, we hope to provide some initial guidance:

#### > Trade

In contrast to its lack of preparedness on Trump's other challenges, the European Commission was ready for him to launch new trade wars. As a response to Trump's first administration, it had already developed countermeasures and adopted an Anti-Coercion Instrument in December 2023 to improve the EU's agility. As the impact of Trump's “Liberation Day” – and the partial reversal that followed it – continue to shake global markets, Berlin will need to help drive efforts to increase European competitiveness and bolster the endangered international trading system.

#### > NATO

The collapse of the previous German government just after Trump's election prevented Berlin from optimally preparing for Trump's challenges to European defense. But Germany's massive new spending package and the EU's ReArm plan are important contributions

toward improved European security capacity. Next steps must include streamlined and coordinated procurement and the Europeanization of the defense market.

## The policy of the second Trump administration will remain a shuffle between the strategic interests of different coalition members and Trump's instincts and whims

### > Russia

The radical turn of Washington's posture toward Ukraine and Russia took even a wary Berlin and Europe by surprise. Berlin's new government must work with European partners to strengthen the European pillar of NATO. At the same time, it should resist the Trump administration's push toward normalization and instead maintain policies that weaken Russia in its neighborhood.

### > China

Germany expected tough US measures against China in the initial weeks of the Trump administration. Instead, the administration targeted traditional allies, prompting Berlin to manage the fallout. Although the new German government supports transatlantic cooperation, it aims to balance partnership with China on global issues with a de-risking strategy. To meaningfully engage Washington, Berlin will likely be put under pressure to harden its approach to China.

### > AI

Reflecting the consequences of years of underinvestment in tech sovereignty and AI, Germany and Europe were inadequately prepared for Trump's aggressive AI deregulation agenda. The European response shows strong regulatory resolve and remarkable financial

mobilization: It is actively recalibrating its strategies to address tech dependencies, EU-wide regulatory divergence, and competitive pressure from the United States.

### > Migration

So far, the Trump administration's dramatic and diverse moves on migration have mainly been met with silent judgement from Berlin. Despite being more conservative than its predecessor, the new German government should be wary of copying Washington's deterrence approach. It will have to help the EU improve its own migration resilience and could start by implementing the Common European Asylum System (CEAS).

### > Climate

While certainly unwelcome, the climate policies of Trump 2.0 were not unexpected in Berlin. Germany's own political upheaval, however, meant it has been slow to respond. The EU signaled that it will continue its pursuit of ambitious climate goals and uphold the Paris Agreement. Germany's new government should lead with ambitious domestic climate action, support a united EU response, and deepen climate and just energy transition partnerships that advance both diplomacy and resilience.

# The Tariff President Subverts Global Trade

US President Trump believes in taking a rebalancing approach to trade. In his view, the United States lowered its tariffs in the period after the Second World War to support the reconstruction of Europe. Since then, other countries have not responded in kind but have taken advantage of the open US market. Therefore, Trump imposed new so-called reciprocal tariffs against almost all countries that the United States trades with on April 2, 2025 – his “Liberation Day.” He decided on a baseline global tariff of 10 percent. In addition, he announced higher reciprocal tariffs for a variety of countries, which were later paused for 90 days. The higher tariffs were determined by an arbitrary calculation relating to trade deficits divided by imports. For the EU, this would lead to a new tariff of 20 percent on imports even though its current account deficit with the United States is almost balanced and the average EU tariff is only slightly higher than that of the US.

*The EU needs to look for new partners to support the liberal trading system and to prevent a downslide to power-based trade*

In addition, Trump wants to impose tariffs on the five sectors known as the BIG 5 – steel, cars, pharmaceutical products, semiconductors, and lumber – to secure and protect US manufacturing.

Even as an EU member, Germany is particularly vulnerable. In 2024, its trade surplus with the United States increased to €70 billion, a stark rise from the previous record of €63 billion in 2023. In addition, Europe’s automotive sector – especially German luxury cars – has been at the center of Trump’s ire. Trump

frequently mentions one specific transatlantic tariff difference: While car imports in Europe are subject to a tariff of 10 percent, the United States only charges 2.5 percent. (Trump does not mention the fact that the US levies a tariff of 25 percent on “light duty trucks.”) On March 26, Trump already announced general tariffs on cars and car parts. On April 2, he confirmed that his 25 percent global car and truck tariffs would take effect as scheduled on April 3 and that duties on automotive part imports will be launched on May 3.

But the reciprocal tariffs and the car tariffs are not the only plans for the Tariff President. Relating to further BIG 5 sectors, Trump already imposed tariffs of 25 percent on all steel and aluminum imports on March 12. These apply to all countries, including the EU, without any exceptions. There are also future tariffs on the horizon for Europe and Germany to prevent taxes (digital services taxes), to stop regulations (Digital Markets Act, Digital Services Act), to achieve political goals (security spending), and to simply gain revenue.

## EUROPE IS WELL-PREPARED WITH COUNTERMEASURES, BUT THE SCALE IS WORRISOME

Given the trade fights that took place during Trump’s first term in office, Germany and Europe are better prepared to face Trump’s second administration. But even so, the tariff policies of Trump 2.0 could incite a trade war of unprecedented scale, thereby endangering the entire rules-based trading system created after the Second World War.

**The first US tariffs to impact the EU are the steel and aluminum tariffs** that Trump reinstated on March 12. This action feels familiar as they were initially imposed by Trump in March 2018. They were supposedly based on national security concerns outlined in Section 232 of the Trade Expansion Act of 1962. At that time, the EU rightly stated that these tariffs were safeguard measures not related to national security, and it decided to challenge them at the WTO. In 2018,



the EU also hit back with tariffs under its Enforcement Regulation, targeting sensitive American products such as whiskey or Harley Davidson motorcycles. During the Biden administration, a political solution was found, and both sides paused their tariffs. Given that Washington has now relaunched the old tariffs, the EU could simply reintroduce or even increase its old counter-tariffs, which at this writing are still on hold.

When it comes to responding to Trump's plan for **reciprocal tariffs**, the EU has opted for a two-pronged strategy. First, EU Commissioner for Trade and Economic Security Maroš Šefčovič went to Washington twice to offer deals to make use of Trump's transactional approach to trade policy. These offers related to increased purchases by the United States of liquefied natural gas (LNG), maybe also hydrogen, and military equipment. In addition, Šefčovič suggested that the EU could lower its car tariffs – or both could lower their entire industrial tariffs – to comply with Trump's reciprocal approach.

The baseline 10 percent tariffs came into effect on April 5, while the custom tariffs were introduced and quickly paused on April 9. Here, the EU – and Germany – will also be prepared for a strong response if negotiations fail. As an answer to the first Trump Presidency, the EU created the **Anti Coercion Instrument**, which entered into force in December 2023. With this instrument, the EU can move more quickly once the European Commission and the Council have decided that a case of coercion has taken place. If so, it only needs a qualified majority vote to impose tariffs, restrictions on services trade and trade-related aspects of intellectual property rights, and restrictions on access to investment and public procurement.

## WHAT GERMANY SHOULD DO: ADVANCE THREE STRATEGIC PRIORITIES AT THE EU LEVEL

In the present conflictual environment, with a strong “America First” approach on the one side and an increasingly aggressive China on the other side, Germany and its fellow EU countries must work together on three strategic priorities over the next two years:

**1. The EU must create stronger European economic resilience by enhancing its own competitiveness.** The most important trading partners for European countries are other European partners, and a strong common market is the biggest asset

in this regard. Therefore, the EU needs to finish the common market in services, energy, and the digital area. The recommendations of the [Draghi report on EU competitiveness](#) should be implemented as soon as possible.

**2. The EU needs to look for new partners to support the liberal trading system and to prevent a downslide to power-based trade.** Neither the United States nor China is currently an option in this regard. Consequently, the EU needs to look for like-minded middle powers in the WTO to follow up on market integration; modern trade rules, including sustainability issues or digital trade; and the reform of the global trade governance system. The EU has an (almost) global network of free trade agreements in place and is negotiating with several new countries in and around Asia. Such a network can serve as an important basis for future collaboration on the issues mentioned above.

**3. The EU must respond to trade coercion through tariffs in a way that is strong and unified yet proportionate.** The respective trade instruments are in place, but they need to be applied in a WTO-conform manner. However, to achieve more impact, it makes sense to also look for like-minded partners and coordinate a response. Potential partners include six of the G7 countries, including Canada and Japan, as well as Australia, South Korea, and others.

Protectionism and trade fragmentation especially hurt weaker countries. Therefore, in addition to the three shorter-term goals above, the EU should also pursue the longer-term goal of rescuing the rules-based trading system over the next four years. It should take the lead in establishing a coalition of the willing that pledges to continue to adhere to global trade rules.



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# Trump's Shifting Stance on NATO

Despite rumors and blustering rhetoric suggesting otherwise, no decisions have yet been made that indicate that the United States is going to entirely abandon its European allies. However, high-ranking members of President Trump's second administration have made announcements that signal the direction US NATO policy might take. For instance, during a meeting in Brussels in mid-February, Secretary of Defense Pete Hegseth stated that "[safeguarding European security must be an imperative for European members of NATO](#)" since the United States would be prioritizing the Indo-Pacific region. Reinforcing his argument, Hegseth made clear that the US expected its European partners to take on the bulk of conventional deterrence and defense and deterrence in and for Europe. On the other hand, the defense secretary underlined that "[the United States remains committed to the NATO alliance and to the defense partnership with Europe. Full stop](#)," with the caveat that Europeans must contribute far more to their defense. During a meeting in Brussels in early April, Secretary of State Marco Rubio also reaffirmed America's commitment to NATO on behalf of the US government, though he likewise emphasized that European countries must significantly increase their defense budgets.

In his February remarks, Hegseth referred to the importance of US boots on the ground and did not present plans for a notable drawdown of American troops for the time being. President Trump has also denied that he is considering withdrawing troops from Europe, potentially in the framework of a US-Russian deal over Ukraine.

The first 90 days of Trump's second term have not brought any significant changes to Washington's NATO policy. However, the statements described above and fluctuating rhetoric indicate that the United States might be using the specter of abandonment as a strategy to push NATO allies to align with Trump's demands related to defense spending and the broader contours of burden-shifting within the Alliance.

## EUROPE WAS CAUGHT UNPREPARED BUT IS TAKING BIG STEPS

In response to uncertainties awoken by the Trump administration's statements and actions, especially regarding Ukraine and Trump's great power affections, Germany's parliament has introduced a significant defense spending vehicle. On March 18, the German Bundestag passed a bill exempting defense spending beyond 1 percent of GDP from the debt brake enshrined in the national constitution, granting the next government considerable room for more spending. The EU has not been idle either. On March 4, the European Commission unveiled the [ReArm Europe plan](#) which proposes, among other things, the activation of the escape clause of the Stability and Growth Pact granting member states the opportunity to spend more on defense without violating deficit rules.

Germany and other EU member states seemed to be caught off guard – not only by Trump's general statements on security and defense policy but also by Hegseth's particular elaborations on NATO. Yet, the proposals put in motion by Berlin and Brussels as a response are rather strong.

## WHAT GERMANY SHOULD DO: RAPIDLY ADVANCE EUROPEAN COORDINATION

Germany should take three steps to address the risks posed by Trump's shifting and at times unclear stance on NATO as well as the increasing security challenges Europe faces:

- 1. Design procurement to meet NATO capability targets.** Germany must streamline its procurement plans with the capability targets and requirements determined by NATO's Defense Planning Process – which, in turn, is closely linked to the implementation of NATO's Regional Plans. As NATO is currently in the process of assigning the capability targets to its members, Berlin

should think ahead and plan exactly which systems it wants to acquire to meet the desired demand described by those targets. This national planning process should be closely coordinated by the incoming German government with the coun-

## *Germany should push its European allies to prioritize integrating forces across EU and NATO member states*

try's European allies, especially within the Group of Five (GoF), i.e., Germany, France, Italy, Poland, and the United Kingdom. Part of these coordination efforts should include having plans at the ready that detail how to potentially supplement or even replace US capabilities and troops currently assigned to NATO. In addition, Germany should push the GoF to draw up plans in the shorter term on how to bolster NATO's Eastern Flank, especially in the Baltics. These will become necessary should the likelihood of a Russian incursion become more apparent much more quickly than anticipated thus far.

2. **Prioritize the implementation of the National Security and Defense Industry Strategy.** Germany's current procurement processes are costly due to small order quantities that result in higher unit prices. Despite stable funding, Germany and other countries show limited ambition in this area thus far. Meanwhile, Russia has increased production capacity and has reportedly become able to produce the Bundeswehr's entire stock within six months. To address these challenges, Germany introduced a National Security and Defense Industry Strategy in December 2024. It explores enabling advance orders for the armed forces over the next decade, fixed purchase quantities, and advance payments. The strategy also supports strengthening the European Investment Bank's role in security and defense. If implemented,

these measures could significantly enhance Germany's defense capabilities. Thus, the incoming German government should prioritize its execution while also advancing a European defense market.

3. **Integrate EU forces.** Germany should push its European allies to prioritize integrating forces across EU and NATO member states. Up to this point, the efforts of various European nations to integrate their forces have seldomly been tested in terms of operational readiness, meaning actual deployments. Yet, integration – and regular tests of its progress – should undoubtedly be the benchmark of ambition given the current and foreseeable security challenges Europe faces.

Future force integration should involve permanent multinational formations featuring national brigades as core units that train and operate together. This approach fosters harmonization of doctrine and equipment across participating nations. It also aligns with NATO's Force Model (NFM) that was introduced in June 2022 after Russia's full-scale invasion of Ukraine.



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# Trump Changes Sides to Cooperate with Russia and Weaken Ukraine

Donald Trump's election to a second term marks a departure from his first regarding transatlantic relations, the relationship of the United States with Russia, and US support for Ukraine. This Trump administration is questioning US security guarantees for Europe – and thus the role of the United States in NATO. It is also trying to normalize relations with Russia and sees Ukraine as an obstacle to this. Trump apparently wants to use massive political pressure to force Ukraine into a capitulated peace in which it makes concessions to Russia without the Kremlin having to make any in return. These concessions include the rejection of Ukraine joining NATO and of US security guarantees for a ceasefire agreement. Pressure is being put on Ukraine to permanently give up territory. Neither Ukraine nor its European partner countries should be involved in negotiations with Russian leaders. Instead, Trump is focused on meeting Putin in person and making a deal himself.

The Trump administration's approach is aimed at securing Russia's support for what it considers to be more strategically critical issues. These include the

*Germany and the EU must not only invest in their own security as rapidly and thoroughly as possible, but they must also expand their support for Ukraine*

Middle East and Iran but especially China. Members of Trump's team seem to believe that Russia could switch sides and help weaken China. However, the common

interests of the two authoritarian states – for example, in relation to commodity transactions, technological dependency, and, above all, their rivalry with the United States – make this highly unlikely. Moscow does not trust US politics, and even if Trump really wants a rapprochement with Russia, a new US president could be expected to change this policy. Nevertheless, the current US government seems willing to effectively hand over Ukraine to Russia and accept the loss of its sovereignty. In early March, the Trump administration temporarily suspended arms shipments to Ukraine and intelligence sharing to force the country into negotiations and to extract a deal on the exploitation of rare-earth elements by US companies. These moves led to Ukraine losing hundreds of soldiers in the Kursk region in a short period of time and ultimately the loss of the entire region.

## A REAL EUROPEAN ZEITENWENDE AT LONG LAST

Although Germany and the EU had been bracing themselves for conflict in the run-up to America's vote in November and expected it when Donald Trump was elected for the second time, they were not prepared for this radical turn in US policy. Now, they must not only invest in their own security as rapidly and thoroughly as possible, but they must also expand their support for Ukraine – both militarily and financially – more quickly and comprehensively. The next German government, a coalition between Christian Democrats (CDU/CSU) and Social Democrats (SPD) that will take office soon, has promised to create a special fund of €500 billion to support massive investments in infrastructure and defense. This fund is also linked to increased military and financial support for Ukraine, which has yet to be further specified beyond the €3 billion currently under discussion for 2025. EU Commission President Ursula von der Leyen plans to invest up to €800 billion in European defense with the help of EU member states.

To circumvent potential blockades by Hungary and Slovakia at the EU level, **a coalition of the willing should be organized for this purpose, including the United Kingdom, Norway, and Canada, among others.** Resources stemming from a coalition on this scale would not only give a substantial boost to European defense and Europe's ability to play a relevant role in its own security, but it would also be a sign of European responsibility for Ukraine. In short, it would mark a real *Zeitenwende* for German and European security and Ukraine policy.

In Berlin, Brussels, and the capitals of other EU member states, discussions are continuing on expanding sanctions against Russia and going beyond the Europeanization of military production to advance it in closer cooperation with Ukraine. When Trump's turbulent second term began, Germany had not yet held its February 23 elections to determine a new federal government. As the next German government is not expected to be sworn in until the first week of May, Berlin has not played a leading role in responding to US policy so far. That is currently being done by the UK and France who brought Ukraine to the negotiating table to discuss the strengthening of its military. Their talks have also addressed security guarantees and the stationing of European troops at the line of contact, which could secure a ceasefire.

## WHAT GERMANY SHOULD DO FOR ITS OWN AND EUROPE'S SECURITY

As soon as the new German government takes office, it must urgently help lead the debate around European security:

- 1. Germany must strengthen NATO's European arm and thus invest in its own defense.** In doing so, it must work closely with its European partners – above all France, Great Britain, and Poland.
- 2. The German government should work to maintain US security guarantees and investments in US equipment.** In a transitional period, it should coordinate further support for Ukraine with Washington. At the same time, Germany should strengthen its own military industry together with its European partners in preparation for the possible end of US security guarantees.

- 3. German and European policy must also aim to systematically weaken Moscow in its neighborhood.** In the short- to mid-term, this should be done through increased investment in the connectivity, economy, and security of the post-Soviet states. In the long term, only a deep regime change in Russia can lead to peace in Europe.

In conclusion, the new investment packages for Europe and Germany must both lead to the development of a European defense industry. These packages will help Europe to become less dependent on the United States while enabling the EU to act as a stronger partner alongside Washington in other contexts. At the same time, Ukraine must be integrated into the European defense and security system, and German companies must collaborate closely with Ukraine on the production of weapons and drones. Only in this way can Europe take the security and peace of the continent into its own hands.



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# Making Sense of a Trump 2.0 Policy Toward China

A clear Trump 2.0 policy on China remains difficult to discern. Trump's key political appointments consist of advisors who promote government efficiency and traditional Republican China hawks (see useful [analysis](#) by Rachel Tausendfreund, DGAP's senior research fellow USA/transatlantic relations). As a result of a series of staffing changes – and a continually evolving mix of China hawks and advisors with other priorities – it is difficult to assess who steers this administration's China policy and what direction it is likely to take. Despite this dynamic situation, a few key policy announcements since Trump's inauguration are noteworthy.

**Tech Partnerships:** One of the most significant documents issued by the Trump 2.0 administration is the [America First Investment Policy](#) that outlines an openness to engagement with partners, particularly in terms of investment in key technologies. However, this openness is conditional and “will ease in proportion to their verifiable distance and independence from the predatory investment and technology-acquisition practices of the PRC and other foreign adversaries or threat actors.” Compared to the Biden administration's approach, this is a more direct articulation of how allies and partners are expected to shape their own relationship with the People's Republic of China. In short, the Trump administration wants to welcome partners with a not so close relationship with China while stigmatizing those who do have close ties.

**Global Trade:** Most expected Donald Trump to act against China in the opening days of his administration. However, [major initial tariff actions](#) did not target China but major partners and allies. This changed quickly when, in early February, a series of executive orders was issued to address trade imbalances that was portrayed as a response to the fentanyl crisis that targeted China. These orders and subsequent revisions placed a 10 percent tariff on all Chinese imports and eliminated the *de minimus* exemptions, which exempted low-value imports from duties. Subsequent tariffs on Chinese imports – also, most recently, in reaction to China's retaliatory levies – resulted in an

astounding 104 percent tariff rate against China on “Liberation Day.” At the time of this writing, Trump reversed course and dropped the “reciprocal” part of these tariffs against most countries. Yet, he announced that tariffs on China would persist and climb to 125 percent.

**Security:** The Trump administration's attempts to resolve Russia's war on Ukraine appear to be informed by an urgency to shore up deterrence in the Indo-Pacific. A [Heritage Report](#) published last summer has since been [credited](#) as forming the basis of US Department of Defense thinking. The report says: “The US military can no longer clearly deter China, and risk of a third world war is rising. This report proposes a new defense strategy to change that. Under this strategy, America's military would prioritize defending the US homeland and denying China's imperial ambitions, most urgently by deterring Beijing from invading Taiwan. At the same time, Washington would empower allies and partners to lead efforts to defend against Russia, Iran, and North Korea with critical but more limited US support.”

In a step toward this repositioning, US Secretary of Defense Pete Hegseth [visited Japan](#) on March 30, 2025, to celebrate the upgrading of US-Japanese forces to a joint force headquarters – a move aimed at “reestablishing deterrence” in the Indo-Pacific. On April 1, 2025, the People's Republic of China, in all likelihood in response to Hegseth's visit, [launched military drills around Taiwan](#).

## GERMANY'S RESPONSE TO TRUMP'S CHINA POLICIES SO FAR

Despite legitimate German horror at the significant transatlantic break by the Trump administration, Germany's incoming [coalition government](#) communicated a desire to uphold the transatlantic partnership with the United States. In its coalition agreement, it sets out its intent to continue to seek partnership with China for issues affecting “humanity” while looking to advance Germany's de-risking strategy. The

## Government stakeholders – at the national and EU level – should take stock of their relationship to China and be ready to communicate their justification for it

German government has also reacted to Trump 2.0 by issuing a flurry of rearmament initiatives that, if implemented, will lead to greater European burden sharing and, simultaneously, to a greater degree of sovereignty vis-à-vis the United States and China.

Most German stakeholders are not following the additional escalatory steps the United States could take. Here, the most significant tool at the disposal of the US government is the [suspension of the “permanent normal trade relations” \(PNTR\) status of the People’s Republic of China](#). In 1999, the United States agreed on the accession of the PRC to the WTO; shortly thereafter, in 2000, the US Congress erected the US-China Economic and Security Review Commission to monitor the PRC’s trade behavior. Last year, the Commission recommended revoking PNTR from China, and [legislation has been introduced](#) in Congress that would do just that. Suspension of PNTR would mean that China’s normal trade relations status would have to be renewed on an annual basis, allowing the United States to use this renewal process as a form of leverage.

### WHAT GERMANY SHOULD DO: ASSESS CHINA STRATEGY AND PREPARE FOR MORE TENSION

**1. Clarify and position its relationship to China.** It will be increasingly difficult for the German government to reconcile its relationship with the United States and the People’s Republic of China. Government stakeholders – at the national and EU level – should take stock of their relationship to China and be ready to communicate their justification for it. Based on its own independent assessments of this relationship, Berlin should develop plans for modifying it as needed.

**2. Prepare for the possibility of the suspension of China’s PNTR status by the United States.** While such a step is unlikely, the Trump administration has signaled a willingness to further escalate its trade war by following through on a [recommendation issued last fall](#) by the US-China Economic and Security Review Commission to suspend permanent normal trade relations (PNTR) status for China – which would be a shift of historical proportions. German and European governments should prepare by developing plans for how to withstand and respond to such a step.

**3. Renew engagement in the Indo-Pacific region.** The preoccupation of the United States with the Indo-Pacific region will intensify and draw on an ever-greater share of US resources. This creates renewed urgency for German engagement in Asia, including, for example, an update of the federal government’s [Indo-Pacific guidelines](#).



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# The Trump Team's Zero-Sum Tech Race Toward US Dominance

Within days of taking office for his second term, US President Donald Trump signed the [Executive Order on Removing Barriers to American Leadership in Artificial Intelligence](#). It deliberately dismantled the regulatory framework established by Joe Biden by rescinding his Executive Order 14110 that had emphasized safety, ethical guidelines, and international cooperation. Crucially, the new directive explicitly rejects what it terms “engineered social agendas” and “ideological constraints” – directly attacking Biden-era priorities around algorithmic fairness, privacy protections, and safety guardrails as politically motivated barriers to innovation rather than legitimate public concerns.

*Germany needs to seize the current AI momentum by developing tech sovereignty*

Trump's administration has mobilized an “AI Action Plan” task force dominated by figures from the Techno-right, including Silicon Valley luminaries who advocate for minimal government intervention in AI development while they simultaneously support aggressive export controls to maintain America's technological edge. This combination of views represents a classic dynamic in Trump's coalition that melds the deregulatory fervor of the Techno-right with the determination to strengthen US tech sovereignty of the economic nationalists.

Trump has assembled [frontrunners in research and investment, as well as leaders from the majority of Tech Giants](#), in his administration. Accordingly, it

treats AI capabilities as strategic leverage to be selectively deployed for maximum advantage, implementing a technological version of “America First” that views even traditional partners as, at best, clients and, at worst, adversaries.

## THE EU RESPONDS WITH REGULATORY RESISTANCE BUT LACKS A SOLUTION FOR DEPENDENCY

The EU has maintained its [commitment to the AI Act](#) as a cornerstone of its response, explicitly rejecting the Trump administration's pressure to water down key provisions around safety, transparency, and ethical safeguards. European officials have [framed this regulatory stance as a competitive advantage](#) rather than a burden, betting trust and accountability will become differentiating factors in global AI development.

The EU's introduction of the “[Competitiveness Compass](#)” policy package in January similarly aims to balance innovation with oversight, acknowledging competitive challenges without abandoning Europe's fundamental approach. In an acknowledgement of the Draghi Report on EU competitiveness, it [recognizes the need to adapt to changing geopolitical dynamics](#).

Capital mobilization, as well as industry-led initiatives, have emerged as a bright spot in Europe's response. A spate of new developments demonstrates the EU's industrial strength and ambition in this regard. Some of them were announced around the AI Action Summit held in Paris in early February. Of particular note are the “[InvestAI](#)” initiative of €200 billion, the [AI Championship Initiative backed by European corporations pledging €150 billion](#), national investment programs like [France's €100 billion commitment](#), and the [French-German AI Industry Executive Dialogue](#).

However, these political and regulatory responses have not addressed [Europe's profound tech dependence](#). Critical AI infrastructure – from specialized chips to cloud computing – remains dominated by US corporations.

## WHAT GERMANY SHOULD DO: HELP MAINTAIN THE EU AS A VALUES-BASED ALTERNATIVE

Germany needs to seize the current AI momentum by developing tech sovereignty. In doing so, it must simultaneously capitalize on its industrial strengths in a distinctive European approach, establishing trustworthy AI as a competitive market advantage. By focusing on specialized industrial applications, regulatory leadership, and sustainable computing capacity, Germany and the EU can establish themselves as a driving force in the global AI landscape while maintaining a values-based alternative to both US deregulation and Chinese state control.

Specifically, Germany should take three steps:

- 1. Develop world-class niche expertise in strategic AI domains.** Germany must develop indispensable expertise in AI domains where it can establish global leadership positions like the one held by Dutch company ASML in semiconductor manufacturing. The incoming federal government should help establish development programs that focus on imparting targeted expertise in areas where German industrial strengths can create tech leverage points: industrial AI applications for precision manufacturing in automotive production, specialized AI chips for energy-efficient edge computing, and highly secure AI systems for critical infrastructure protection. The goal here is to create globally unique capabilities that generate technological dependencies on German expertise within international AI supply chains.
- 2. Establish a “Trustworthy AI” certification program.** Together with its partners in the EU, Germany should establish an AI certification program that turns EU regulatory standards into a global market advantage. This program would create a tiered certification system for AI applications that meet enhanced standards for privacy, transparency, robustness, and ethical alignment. The German government should coordinate with the EU's European AI Office and national certification offices, such as the TÜV AI.Lab,

for implementation in developing certification protocols. Supported by public procurement commitments to certified AI systems, this initiative would create immediate market demand for compliant technologies.

- 3. Create a public-private AI Infrastructure Consortium.** The incoming German government, together with industry, should immediately establish a public-private AI Infrastructure Consortium that combines federal investment with the know-how of industrial partners to develop sovereign computational capacity for training and deploying large AI models. This initiative should allocate funds to construct specialized AI data centers powered by renewable energy, giving Germany a competitive advantage in sustainable AI computation. The consortium should prioritize developing specialized hardware capabilities through partnerships with European semiconductor firms and research institutions, focusing particularly on energy-efficient AI accelerators.



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# Trump's Migration Blitz

Trump's actions on migration in his first 90 days in office have been quick and prominent. He has ramped up border enforcement, cut humanitarian admissions, made it practically impossible to seek asylum at the border, and hit the restart button on outsourcing asylum responsibilities to Mexico. He has begun to implement the mass deportations he promised by using military planes and the [Guantánamo military base](#) and by threatening Latin American countries with tariffs and other punitive measures.

Trump's strategy behind these actions is consistent: use shock and awe to decrease all migration. The strategy has brought harshness to the border and produced images of shackled migrants flown to far-flung places, but its effects on migration numbers have been mixed. [Arrivals have plummeted](#) to the lowest levels since 2017 when Trump began his first term in office – an unqualified triumph for enforcement supporters. But despite appearances, [deportations have yet to reach the levels under Biden](#).

The global impact has been negative. With the United States halting refugee resettlement and cutting funding for the UN Refugee Agency UNHCR, the global common good of refugee protection is hanging by a gossamer thread. On top of that, Europe and Germany are feeling [three main effects](#). As European politicians seek inspiration in the deterrence concepts of the United States, migration debates are hardening. As some would-be migrants – primarily from Latin America (especially Venezuela) but also Asia and Africa – seek alternative destinations, migration flows are shifting. And as German citizens have [been denied entry](#) or [found themselves in detention](#) upon trying to cross the US border, the harshness is hitting Europeans too. Deterrence, when badly designed, does not differentiate.

## EUROPE'S WEAK RESPONSE: ATTENTIVE SILENCE

Germany and Europe have watched the undoing of the United States' decades-long migration commitment attentively but quietly. Some are thrilled (We should be doing this too!), others are outraged (We must be better than this!), but all are fascinated.

There are two reasons for the notable lack of official comment. First, European politicians are too busy watching and learning from US experiments they want to copy. Policymakers are particularly interested in the deportations of non-nationals to Costa Rica, Panama, and El Salvador because they mirror the so-called return hubs currently in vogue in Europe. Europeans would also like to emulate the so-called Remain in Mexico program to expand asylum outsourcing concepts such as the Italy-Albania agreement, which is still struggling to take off.

The second reason why European leaders have stayed silent about Trump's migration agenda is that many see US migration, falsely, as something far away, and as an internal area largely unrelated to foreign policy. While this belief is anachronistic and [regularly debunked](#), migration nonetheless remains an unwelcome topic for politicians, only to be dealt with once arrivals rise and local cries for attention become too loud to ignore. European leaders may become more open to the fact that they ignore US migration policy at their (and their citizens') own peril once US deterrence inflates asylum numbers in Europe. For now, Germany and Europe are far from ready to respond smartly to Trump's new migration rules.

## WHAT GERMANY SHOULD DO: FACE THE MUSIC AND TAKE THREE STEPS

Change starts with facing the facts. German politicians of all parties need to acknowledge that Trump's migration policies indeed impact Germany and Europe directly and negatively. Ironically, Germany's most anti-migration-party, the AfD, simultaneously rejects migration but embraces Trump, even though his policies push migration pressures toward Europe.

Germany and its fellow EU countries should take three steps to respond more solidly to Trump's migration blitz:

- 1. Implement the Common European Asylum System (CEAS) for a better European response.** The CEAS reform, agreed last year, comes into force in June 2026. The time to prepare is now. EU countries should move their national implementation



plans from paper to practice. If they do so, the hope is that Europe can better deal with sudden inflows and more quickly return people without a valid asylum claim. CEAS is maligned by many, but it is still the best option Europe has to date.

*German politicians of all parties need to acknowledge that Trump's migration policies indeed impact Germany and Europe directly and negatively*

**2. Copy with care: Deterrence has limits.** Trump's deterrence measures are a dream come true for proponents of asylum caps, outsourcing, and return hubs. The EU is already trying to copy these approaches, along with the pressures on partner countries. However, because it has less leverage than the United States, it should do so carefully. The EU's ability to threaten and to withhold visas, development aid, and trade preferences is [less effective than many Europeans like to think](#). Also, the EU has less legal leeway. It can try and do what Trump does, but only if it fundamentally changes or breaks its laws, especially those that set higher human rights standards than those by which the United States is bound. Another reason to shun a copy/paste approach is that US deterrence does not deliver reliably. Trump's first term saw decreased arrivals in the first months (just like now), but irregular migration crept back up and, except for the 2020 Covid slump, grew every year he was in office.

Whether the goal is less migration or just more order, deterrence and detention alone are simply not enough. To make a difference over the long term, they must be coupled with other measures, including legal pathways and investments in alternative host countries.

**3. Change tactics and reach out to allies.** German politicians, authorities, and philanthropic organizations should invest in expanding migration exchanges between the United States and Germany. Connecting migration actors brings two payoffs. First, Germany can learn from the US how to digitize more parts of the migration process. Second, to balance out the blossoming ties between anti-migration proponents on the federal level, like-minded supporters of integration on the local level – including mayors and school principals – can become new allies. They can share lessons related to advocacy, housing, schooling, the integration of new arrivals into the labor market, and more.

Does the idea to form novel alliances sound counterintuitive at a time when the relationship between the United States and Europe is nose-diving? Sure, but upheaval brings opportunities to define new actors that can shape the relationship in the future. The time for “more of the same” is over.



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# Climate Under Attack

In a far-reaching but unsurprising move, President Trump signed an [executive order](#) on his first day in office to, once more, withdraw the United States from the Paris Agreement. The decision was based on claims that the agreement imposes an unfair burden on taxpayers and the US economy, reflecting the rhetoric and actions of a leader who has repeatedly called anthropogenic climate change a “hoax.” The withdrawal of the [second-highest emitter of greenhouse gases](#), while anticipated, marks a significant setback for global climate protection efforts. It could [demotivate](#) other countries from reducing emissions or, worse, prompt them to follow Washington’s lead.

As part of the withdrawal, the United States has ceased its contributions to international climate finance. Moreover, also on his first day in office, Trump froze all foreign assistance given through the US Agency for International Development (USAID). These decisions have resulted in the [loss of billions of dollars meant to tackle the adverse effects of climate change](#), including money directed at investing in resilience, preserving ecosystems, or building renewable energy sources for communities at the frontlines of climate change.

However, the US withdrawal from the Paris Agreement could also catalyze increased climate action. Some countries and actors may respond with more ambitious spending or targets. The European Union, for example, could step up on behalf of the agreement or [join forces](#) with others to uphold the principles of what can be called the cornerstone of global efforts to address the climate crisis. The EU may also contribute to the formation of unusual alliances as recently exemplified in a [joint statement](#) between China and France that commits to “uphold multilateralism, and the firm support for the Paris Agreement.”

According to [an analysis by Carbon Brief](#), the “Trump effect” could lead to additional emissions of four billion tons of carbon dioxide equivalents by 2030. Already, the Trump administration’s “drill, baby, drill” agenda – pushing for further extraction of fossil fuels while hindering green technology expansion – has consequences for climate action at the national and international level. Aggressive cuts to development aid and federal agencies will impede adaptation and

mitigation targets. They will also have consequences for research, data collection, and scientific exchange. At the National Oceanic and Atmospheric Administration (NOAA), for instance, a significant number of jobs were [cut](#), and employees [were ordered](#) to pause international engagements.

## GERMANY IS SLOW TO ACTION AND EUROPE PLEDGES TO STAY ITS COURSE

On the day after Trump’s election to a second term in the White House, Germany’s ruling “traffic light” coalition of Social Democrats, Greens, and Free Democrats broke apart. The resulting political paralysis and budget uncertainty have so far hindered a strong German response to US climate policy reversals. Yet, politicians, leading scientists, and representatives of civil society in Germany have firmly [condemned](#) them, also calling for the EU to respond and strengthen its efforts.

*Germany’s new government should continue to foster and deepen climate cooperation, also with strategic partners such as India or Brazil*

European Commission President Ursula von der Leyen pledges to uphold the [European Green Deal](#), a plan approved in 2020 to achieve climate neutrality by 2050. Decarbonizing the economy is one of three pillars of the “Competitive Compass,” the Commission’s roadmap for the coming years. At this year’s World Economic Forum in Davos, von der Leyen [emphasized](#) that “Europe will stay the course” on climate protection and stick to the Paris Agreement. Maintaining

this course is essential, especially as polarization and parallel crises threaten to further sideline the urgency to act on climate change, including its relevance for security. However, as climate protection has dropped down in the list of political priorities of both Germany and Europe, this course is not without obstacles. Yet, because green technology and innovation have meanwhile become key for economic competitiveness, there is cause for optimism.

## WHAT GERMANY SHOULD DO: DRIVE CLIMATE ACTION DOMESTICALLY AND AT THE EU LEVEL

- 1. Lead by example with ambitious domestic climate action.** If Germany can showcase how to successfully transform an industrialized society, it can demonstrate that decarbonization and economic prosperity go hand-in-hand. The incoming German government recently decided to allocate €100 billion for the country's Climate Transformation Fund, which will help it to foster innovations and make investments to do exactly that. In addition to providing economic benefits, competitiveness in green technologies also [strengthens](#) energy security and supports de-risking strategies against China. Moreover, a successful transition pathway to climate neutrality in 2045 lends credibility to Germany's climate diplomacy. Aligning domestic climate action with international commitments helps to build trust.
- 2. Give a strong and united European response.** To fill the vacuum left by the United States – including its decreasing efforts in renewable energy expansion and green technology – the EU and its new Commission must demonstrate climate leadership. This also means accepting the new reality of transatlantic relations and better preparing for uncertainty. The EU needs to both reassure the international community of its commitment to the Paris goals and demonstrate this commitment through concrete financial and policy actions. In the interest of overcoming internal divisions and forming a strong and united front against Trump's agenda, the new German government needs to rebuild trust and prioritize political cohesion within the EU. Climate leadership should include making efforts to reinforce the G7's commitment to eliminate fossil fuel subsidies.

- 3. Strengthen partnerships on climate and just energy transitions.** Germany's new government should continue to foster and deepen climate cooperation, also with strategic partners such as India or Brazil, the host of the next COP. Such partnerships – among them the [Climate and Development Partnerships](#) or the G7's Just Energy Transition Partnerships (JETPs) – serve multiple objectives: they contribute to sustainable livelihoods in climate hot spots and build resilience against environmental crises. Thus, they also directly address factors that drive forced migration. Furthermore, such climate diplomacy efforts could also be beneficial for increasing Germany's soft power and supporting its other foreign policy priorities such as securing a non-permanent seat on the UN Security Council.



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