

Sylvie Kauffmann | Wellenstein lezing 2026

ANATOMY OF A BREAK-UP

Good afternoon, ladies and gentlemen, thank you for being here. I would also like to thank Minister Koenders and the Advisory Council on Foreign Affairs for inviting me to give the Wellenstein Lecture, and thank the AIV team for helping me to prepare for this event.

It is, truly, an honour to be here among you in The Hague, as I am very much aware that most of you here are much more knowledgeable about world affairs than I am.

So after accepting Bert's invitation, I kept wondering "What can I tell them that they don't already know?"

Being neither a diplomat nor an academic, I thought the best thing would be to speak to you as a journalist, from my experience and also from my heart. Emotions do play a role in our job - they sometimes help us to measure the magnitude of an event.

I was lucky enough to cover, early in my career, events that make history, when you experience the emotion of a dramatic moment, when day after day you feel that you are witnessing a tipping point. Being present at the destruction of the Soviet empire and at the creation of a new Europe was, as we say, a "once in a lifetime experience".

There was a lot of emotion in that period of turmoil but it was positive emotion, except of course for people like Vladimir Putin, then a KGB officer in East Berlin.

Why positive?

Because the direction that History was taking was pretty obvious. That direction was the path towards freedom, democracy, free market and the rule of law. That path was more or less direct, it would be more or less painful, but in a few years it led to the enlargement of NATO, of the EU, of the West. The Iron Curtain was down and people who had brought it down could not think of another path. The West had won the Cold War and they wanted to join the West.

I remember the emotion of my closest Polish friend on the day Poland formally joined the EU in 2004. She called me and said: "now we are all European, my children are like yours, European citizens".

This whole process was an amazing success. And the United States had played a key role in that success.

As we all know, things took another turn in the 21st century.

Fast forward some 35 years later and emotion is back. But it is a very different kind of emotion. This time it is mostly negative. Disappointment and resentment have replaced admiration and gratitude. America is not only disengaging from Europe, it is turning against us at the worst possible moment, when high intensity warfare has returned to our continent.

And again, I see a tipping point in our European history as we speak, except that this time the direction is terribly unclear.

So what went wrong? This is what I propose to explore with you today.

If we stick to the metaphor I used for the title of this lecture, “Anatomy of a break-up”, I suggest that we run through three stages of our assessment of the Transatlantic relationship:

First, let us have a closer look at the diagnosis - How serious is the break-up?

Second, I will focus on the causes - What went wrong? What were the warning signs and why did we ignore them?

And finally I will analyse the consequences - Where do we go from here?

1. THE DIAGNOSIS

Where does this relationship stand at the moment?

Words do matter in diplomacy : for a long time, the word “rupture” was to be avoided, but it has recently emerged in the Transatlantic vocabulary. It is not by accident.

Last year, we came to realize that Trump II was different from Trump I. We - I mean most Europeans. From the very beginning of his second term, the pace of “flooding the zone” was breathtaking. The “adults in the room” who had saved us during the first term had disappeared.

We hated every minute of JD Vance’s speech at the Munich Security Conference in February.

We found the public humiliation of President Zelensky in the Oval Office revolting and the suspension of intelligence assistance to Ukraine deeply troubling.

On April 1st, the so-called “Liberation Day”, we could hardly believe our eyes when the president of the USA exhibited a childish blackboard listing the new set of tariffs arbitrarily inflicted on Bangladesh, Mexico and, of course, the EU.

We tried to look the other way when Ursula von der Leyen went to Scotland to visit Donald Trump on his private golf course and accepted a bad deal on tariffs with the hope that, as a trade-off, he would not abandon us on Ukraine.

We watched in dismay when Trump unrolled the red carpet to Vladimir Putin in Alaska. By then it had become clear that neither Putin nor Trump wanted us at the negotiating table and that they planned to decide on the fate of Ukraine and ours together, over our heads. As the saying goes, if you are not at the table, you may well end up on the menu.

And yet we could not gather enough lucidity - or enough courage - to face squarely the damage done to the Atlantic alliance. Our leaders assumed that flattery and obsequious texting would be the best way to somehow coax the unpredictable ruler. We were convinced that we needed to appease him, because our biggest fear was to be left alone to face the increasingly aggressive Russian bear.

Yes, the issue of trust was raised, the relationship was admittedly strained, but our priority was to preserve Europe’s relationship with the US, the backbone of our security for 80 years. The truth was that we were too dependent on our American ally. And Trump knew it.

We did try to take matters in our hands : we set up a coalition of the willing to offer security guarantees to Ukraine in the event of a ceasefire. But even then, we had to beg our American friends to provide us with a “backstop” to protect us in case Russia attacked our troops. It took months of negotiations. To this day, I am not sure that anybody knows what concretely the US has conceded in order to secure this backstop.

Suddenly over the past two months, the mood changed. A succession of events made us realize that it was not possible to pretend any more.

First came the National Security Strategy, the return of the Monroe doctrine and its new corollary, which president Trump so elegantly named the Donroe doctrine. In this document, we learnt that Europe was threatened with “civilizational erasure” and that our alliance was only relevant as long as it served America’s interests.

To be clear, allies are mentioned in the NSS, under Chapter III which is titled : “What are America’s available means to get what we want?”

Then, only four weeks later, came the first concrete implementation of the Donroe doctrine, with the intervention in Venezuela. President Trump told the New York Times that he did “not need International law, as he is guided by his own morality”.

The biggest shock was yet to come: Greenland. Donald Trump made it clear that he “absolutely needed” Greenland, taking us back to the imperial hubris of the 19th century. The president of the United States, the biggest member of our alliance, was threatening to seize the territory of one of its most loyal members.

So now we know. We see, we hear, we read the disrespect, the contempt, some even say the hatred of the European Union. We see the rule of law being weakened, ignored or violated every day in the US. So much for our shared values! This is where the word "Rupture" finally comes in : It took a Canadian prime minister, Mark Carney, to tell the naked truth in his speech in Davos:

“ We are in the midst of a rupture, not a transition” .

So “rupture” is now seen as a decent word in our relationship. It is a kind of semantic liberation, fit for a major geopolitical development. Yes, NATO is still there, but the alliance as we knew it has been dealt a fatal blow.

The idea of a united West is gone. If there is still such a concept as the West, it is us. Us - Europe, and Canada, and a few others.

A recent European poll tells us that only 16% of Europeans see America as an ally. Stephen Walt, the Harvard professor, just wrote in Foreign Affairs that the grand strategy of Trump’s second term is best described as “predatory hegemony.”

So we have gone from the "benign hegemon" of the 20th century, whose life we more or less happily shared, to today’s “predatory hegemon” whom we must seek protection from. Some even speculate that the threat on Greenland makes NATO look like the Warsaw Pact.

So what went wrong?

2. THE CAUSES

Was this “rupture” a bolt from the blue? Was it a sudden crisis, maybe a little bit worse than the previous ones, in an otherwise solid marriage? Or was it the culmination of a long trend that somehow we had chosen to ignore?

Looking at these questions, I found myself revisiting a research I made in 2022 for a book about our relationship with Russia. More specifically, I was working on Germany’s and France’s policy towards Putin’s Russia. I was also looking for an answer to the question : What went wrong?

Well, it turns out that there were plenty of warning signs, already early in Putin’s presidency. He blamed the West for orchestrating the colour revolutions in Georgia and Ukraine, he gave a very clear and rancorous speech in Munich in 2007, he invaded Georgia in 2008, he annexed Crimea and invaded Donbass in 2014. That summer his accomplices shot down flight MH 17 - I know how painful this memory is here. These were all blatant violations of international law. And yet we took no serious action.

We refused to see that Putin’s appetite would only grow. We turned a deaf ear to our Polish and Baltic friends. The City of London was awash with the money of his oligarchs, the German industry never had enough cheap Russian gas, France was so fascinated by Russia’s grandeur that it was ready to sell it two helicopter carriers, the famous Mistral. We were naïve, we were complacent, we were blind. Until the shock of the full scale invasion of Ukraine opened our eyes. Too late.

Today, looking back at our relationship with the United States over the past 25 years, I cannot help but feel a sense of déjà vu. I am afraid that we have been struck by the same blindness, the same complacency, ignoring the warning signs of estrangement from our big ally and protector.

Of course it was a very different kind of relationship and unlike with Russia, we had every reason to trust the US. America liberated us during world war two, it played a major role in the reconstruction of Europe. It even supported the emergence of the very European Union it is now targeting. And together we provided a powerful deterrent against the Soviet Union during the cold war.

The end of the cold war disrupted this balance. Gueorgui Arbatov, well-known Soviet expert of American affairs during Gorbachev's time, astutely warned in 1991: "We are going to do something terrible to you - we are going to deprive you of an enemy".

He was right. We lost our common enemy and cracks started to become more visible in our unity.

As we, on this side of the Atlantic, started to lower our guards, cut down on our defense budgets and enjoy the peace dividends, America, following the logic of great powers, focused on the new world emerging and assumed we could take care of the cleaning up of the collapse of the Soviet Empire.

When war erupted in Yugoslavia, we sent European troops under UN mandate but could not end the war in Bosnia. The Clinton administration was reluctant to intervene, and had to be dragged into it. When it finally accepted, it did it the American way : in the driving seat, as Richard Holbrooke, the American envoy, made very clear to his European partners. You could find an early message in this episode : OK, we came to the rescue this time, but this was a European war, not a superpower war, this was something for you to deal with.

Then early in the 21st century, two major shocks fundamentally changed America's attitude towards Europe. One was sudden - 9/11 - the other was incremental and would only be really visible a few years later : the rise of China. Incidentally, China joined the World Trade Organisation in 2001, the same year as 9/11.

9/11, in my view, changed everything. America was under attack, and we tried to help – enforcing article 5 - but our help was reluctantly accepted. Like a wounded animal, America retreated to its den and would not take anybody's advice. Officers from allied countries taking part in the war in Afghanistan traveled to Tampa, Florida, where CentCom had its headquarters and found themselves confined to prefabs, well away from the building where decisions were made. They were neither consulted, nor associated with the decision process, not even briefed regularly.

Under US pressure, some European countries, notably young democracies of eastern Europe, accepted to host the now notorious secret prisons of the CIA, where suspects were held, interrogated and tortured beyond any legal framework, on their way to Guantanamo. The "Global War on Terrorism", I think, drove us apart in terms of values.

The Bush administration, particularly its neo-conservative wing, set its mind early on on Iraq and Saddam Hussein. It was a bad idea - some Europeans knew it and tried to share their concern with their American friends. The then French Ambassador to Washington François Bujon de l'Estang, who accompanied Jacques Chirac to the White House shortly after 9/11, told me how the French president tried to warn George W. Bush about the potentially disastrous consequences for the wider Middle East of attacking Iraq. But it was clear that their mind was set, he told me. Nobody in DC was in a mood to listen to the Europeans.

France and Germany refused to take part in the coalition that would invade Iraq and paid a heavy political price for it. Washington needed European allies to join the coalition in order to legitimize the Iraqi operation; to achieve that goal, it resorted to methods that would fracture Europe and leave deep scars in the European Union.

Faced with France's and Germany's rebellion, Donald Rumsfeld famously shot back : "Do you think Europe is Germany and France? I don't. To me, this is old Europe. If you look at Europe in NATO today, the center of gravity is shifting eastwards. There are many new members. Germany is a problem and France is a problem".

Of course, "new Europe" was an easy target. Some of the post-communist democracies - Poland, Hungary, the Czech Republic – had just joined NATO, but most were still in the process of doing so. The Baltic states, particularly, were anxious to accelerate the process as, unlike us, they never doubted that Russia remained a threat. Strong US diplomatic pressure was applied on their leaders and the message was quite clearly conveyed : if you want to join NATO and if you want the US Senate to ratify your accession later, your participation in the

coalition in Iraq will certainly help. I have talked to former Baltic leaders about that episode, and all of them told me that two factors had played a role in their acceptance : deep gratitude for the role the United States had played in liberating them from the Soviet Union, and an urgent need for security that only NATO membership would provide.

The divisions that Iraq caused within Europe deeply reverberated in the EU. British politicians have told me how it prevented the UK from playing a constructive role in the EU, because Britain was at odds over Iraq with its two big partners, France and Germany. Chirac was so infuriated by the Bush administration's maneuvers with the "new Europe" that he made a very unfortunate comment - those new member states "lost an opportunity to shut up" - that caused such resentment towards France in Central Europe and the Baltic states that to this day they still talk about it.

And more fundamentally, Transatlantic trust was shattered over the lie of the weapons of mass destruction, used as an argument to wage war against Iraq.

In a way, the crisis over Iraq foreshadowed our current predicament with the Trump administration over the war in Ukraine : already visible were our fundamental differences over the rule of law and the use of force. For us Europeans, it was about international law. For America, force and power prevailed.

I would also argue that this breach of trust played a role at the fateful NATO summit in Bucharest in 2008, where Angela Merkel and Nicolas Sarkozy opposed the Bush administration's efforts to open the way to Georgia's and Ukraine's accession to NATO. Merkel and Sarkozy were afraid that opening this door would be seen as a provocation by Putin and I guess that the American fiasco in Iraq did not help a lame duck George W. Bush to make his case in Bucharest. Think of how different our continent would be today if Ukraine was a Nato member !

Barack Obama came as a relief to Europeans. It was a misleading relief, but it was so welcome that again, we took the easy path and decided to close our ears and eyes to the warning signs. The openly declared "pivot to Asia" was obviously one of them. China was rising and the US wanted to focus on this structural development : China and the Indo-Pacific would be the priority, not Europe.

Libya was the first test of a new method of cooperation - and we failed the test. In early 2011, in the early stages of the Arab spring, part of the Libyan population started to rebel against Colonel Kadhafi. Anxious to prevent a mass massacre but reluctant to intervene again in the Middle East, the Obama administration found a formula that would be described later as "leading from behind". France and the UK took the lead, both diplomatically at the UN Security Council, and militarily with an air campaign. But the reality quickly sank in : neither the French nor the British had sufficient capacities to carry out the mission alone.

Eventually, it was decided to involve NATO and the US air force. At the time, this format was celebrated as a new form of transatlantic collaboration under European leadership. But Libya descended into chaos and five years later, in an interview with The Atlantic magazine, Barack Obama described the operation as a European failure: "I thought that the Europeans, because of the proximity of Libya, would be more invested in the following up". In that same interview, Obama described the Europeans as "free-riders".

Bob Gates, the defense secretary, also had a damning opinion, which he laid down in a farewell speech to his NATO colleagues in 2011. The Libya operation, he said, had revealed the huge gap between Americans and Europeans in terms of capabilities. Most NATO members had voted to support the mission, but only half of them took part and only a third carried out the strikes. Not because they did not want to, but because they lacked the capacities to do so. "After 11 weeks of a campaign against a weak regime, the most powerful alliance in the world was short of ammunition and once again, the US had to come to the rescue". Bob Gates warned against an alliance where the US would have the hard power and the Europeans would be content with the soft power: the day may well come, he warned, "when the US realizes that the return on investment is not worth the cost".

Was there an ensuing debate among Europeans about this warning? Not that I know of. If there was, it was very discreet. Once again, we chose to ignore the warning signs.

Another warning sign came two years later, still under Obama. This time it was about Syria. Obama had drawn a red line on the use of chemical weapons by Assad against his own people: if that happened, the US would react. It did happen in the summer of 2013. The attack was well documented, putting the number of people killed at

around 1,500. The red line was crossed, beyond any doubt. The planned response was to involve British, French and US joint airstrikes. But two days before the scheduled operation, the House of Commons, still haunted by the memory of the Iraq fiasco, voted against. Then on August 31, as French planes were ready to take off for their mission, Obama called François Hollande and backed down : he said he needed to consult the Congress. Unable to act without US support, the French had to give up their mission. France was openly powerless. Today, François Hollande confesses that this was the worst memory of his presidency.

Crimea, 2014. A senior diplomat based in Kyiv at the time told me later with tears in his eyes of the excruciating experience of conveying to the new Ukrainian authorities, after Maidan, the advice not to oppose any resistance to the “little green men” occupying Crimea because the United States would not provide them with any military help. This was the message from the Obama administration. Europeans followed the line.

More warning signs? Trump’s first term of course was a constant source of warning signs, threatening more than once to withdraw from NATO and scolding us about our low level of defense spending. Most of us chose to hunker down and wait it out.

And again we were relieved when Joe Biden won the election. And again we misread a president from the Democratic Party who campaigned on a “foreign policy for the middle class”. His Inflation Reduction Act (IRA) was a protectionist measure which heavily penalized European industries.

The withdrawal from Afghanistan pushed us further apart. Early in 2020, Donald Trump had decided to negotiate directly with the Taliban in order to get the issue out of the way during the presidential campaign. Of course, no Europeans were consulted nor invited to sit at the table. When the withdrawal agreement was concluded, the allies were presented with a fait accompli. The following year, under Biden, they had to deal with a catastrophic withdrawal and an abysmal failure. In the UK and in Germany, there was bitter resentment. That resentment finally exploded last month, when Donald Trump insulted the memory of more than 1,000 European troops who would still be alive if, indeed, they had fought “a little back, a little off the frontlines”.

In Ukraine, Biden’s policy was a lesson in ambiguity. In the winter of 2021, the US had all the intelligence on Putin’s plans to invade Ukraine but did nothing to deter him. It did take action afterwards, sending money and vital equipment to support the Ukrainian forces, but was obsessed with the risk of escalation and always stopped short of delivering the weapons which could have been game-changers. Some Europeans disagreed with this strategy, but what could they do? Many of them still had not reached the 2% target of their GDP spent on defense which was set in 2014.

French citizens who so proudly watch their armed forces parade down the Champs Elysees every July 14 were shocked to discover in 2022 that those armed forces had no stock of ammunition for more than three days in a high intensity war. Just as in 2011 in Libya, our shelves were empty.

So what went wrong? By now we more or less know the answer. And then comes the subsequent question : how do we deal with the consequences ?

3. CONSEQUENCES

As Bart De Wever, the Belgian prime minister said, “being a happy vassal is one thing, being a miserable slave is something else”.

The mood has shifted. Beyond Donald Trump, we are dealing with a different America and this is a long term trend. We can’t pretend to be happy any longer. After so many wake-up calls, Europe seems to be finally waking up with a huge hangover. But one thing is to hear the alarm clock, another one is to get out of bed.

The speeches in Davos very much reflected this shift. Von der Leyen, Macron, Zelensky and of course Mark Carney. Christine Lagarde walked out of a dinner to protest against another anti-European tirade from Howard Lutnick, the US Secretary of Commerce. All this was unprecedented.

On Greenland, the Europeans have pushed back and been more assertive. Together with unusual expressions of disagreement in the Republican ranks in the US over Greenland, that pushback made the stock market react negatively. This is the kind of message that Trump understands, and he backed down, announcing that he would

not use force. But this is not the end of the story. I was in Copenhagen last week and nobody there, nor in Greenland, thinks that Donald Trump has given up on the territory that he sees as part of the Western Hemisphere.

Ivo Daalder, the former US ambassador to NATO, has said that we have gone through five stages of grief in the Transatlantic relationship: denial (Trump is not coming back), anger (how can JD Vance talk to us like this?), bargaining (let's promise we'll spend 5% of our GDP on defense), depression (it is not working) and finally acceptance (this is enough). The Economist added that the most dispiriting thing is to have to admit that the French had been right all along. I would add that the most perplexing thing is that the French are not even bragging about it. The geopolitical situation is probably too serious and France's particular fiscal predicament too embarrassing to embark on a "We told you so" campaign, but it is true that as early as 2017, Emmanuel Macron tried to put strategic autonomy and European sovereignty on the agenda, only to get mostly sneering reactions, not even mentioning his "brain death" comment about NATO in 2019.

It is also true that ever since Charles de Gaulle, French presidents have railed against too much dependency on the US. Some historians argue that de Gaulle, while always a loyal ally, never fully trusted America because the US refused to ratify the Treaty of Versailles in 1919 and 1920. After the Suez crisis, France went on to build its own, fully autonomous deterrence force.

When France rejoined NATO's integrated command in 2009, Alain Juppé, former foreign minister and former prime minister, reminded publicly that Chirac and himself had put, years earlier, two conditions to this rapprochement: a fair sharing of responsibilities - meaning command positions - between Americans and Europeans, and setting up an EU genuine security and defense policy. In 1998, Tony Blair and Chirac proceeded to launch the process with the Saint-Malo declaration. Progress was made. But spending did not follow through, leaving Juppé to wonder in 2009: "Do we have the means to achieve our ambitions? And do we have ambitions?" To him, it was also obvious that the Americans did not share our desire of autonomy". The only way to overcome this reluctance would be to show that we have the means - and the ambition.

So do we have the ambition now? German Chancellor Friedrich Merz last December put it this way: "The decades of Pax Americana are largely over for us in Europe. The Americans are now very, very aggressively pursuing their own interests. And that can only mean one thing: that we, too, must now pursue our own interests."

How do we do that? First of all by re-arming, of course. But to rearm, Europe needs to regain economic competitiveness - a mantra we've been hearing for several years without much action. Carney's speech on the power of middle powers seems to have struck a chord and is very much in line with India's own policy.

We may also have a more honest look at our dependences on the United States. As a French former defense minister, Florence Parly, once told an American audience in Washington DC: "article 5 does not mean article F-35". We managed to reduce our dependence on Russian gas, but we now get 90% of our LNG from the United States. Beyond defense and energy, there are so many sectors where we are dependent on the United States: space, telecoms, digital and financial services...

As we are going through a process of self-contrition over our complacency, let us not fall into the trap of the psychology of weakness. Yes, relying on the protection of the US was very comfortable, but that alliance also served America's interest as a superpower. It was definitely a two-way street. Under Trump, the ideological interest is gone, but the business interest is definitely there: and yes, as he says, we have cards. We have cards, and values to defend. Maybe we are not the ones facing "civilizational erasure".

Finally, over the past couple of weeks, I have heard more politicians and military leaders, including a Polish general, counter the idea that Europe is powerless, in reaction to Mark Rutte's comments that we can dream on if we think that Europe is able to defend itself without the US. What we lack, they all say, is not so much the capabilities as the will to show our determination. This is new. I hear Mario Draghi calling for "pragmatic federalism" - and I hear new pleas to finally implement his crucial recommendations. I hear the beginning of a realistic debate about "Europeanization" and "de-Americanization" of NATO. Europe is now talking about nuclear deterrence without the United States: Germany, Sweden, Poland are now looking at their nuclear options.

Something is going on. The EU was built as a peace project and our nations had erased not civilization but the idea of war on our continent. European leaders now have to face up to frank conversations with their voters about the

need for defense as a fiscal overriding priority. It takes a new mindset, but I do believe that people are more open on this point than most politicians.

Let me finish by quoting a line from a famous Hollywood movie, *The Good, The Bad and The Ugly* : "You see, in this world there's two kinds of people, my friend: Those with loaded guns and those who dig. You dig." In a way, this is a good description of Trump's world. But we will not be the ones who dig.

Thank you.

