

Transcript — Why Trump Is Not to Blame for Europe's Predicament

Christian Smith: Welcome to this podcast from Geopolitical Futures. I'm Christian Smith. Last year's Munich Security Conference featured a speech from US Vice President J.D. Vance in which he chastised European leaders for their policies on free speech and immigration. The conference often gives rise to groundbreaking speeches. This is after all, the place where Vladimir Putin signaled his rejection of the US-led world order. The 2026 conference was perhaps less dramatic, but with fundamental changes underway in the international system, geopolitics right now is nothing if not dramatic. So today on the podcast we take a look at the 2026 Munich conference that took place last week and what it tells about the state of Europe and the transatlantic alliance. I'm joined by George Friedman, the New York Times best selling author and the founder and chairman of Geopolitical Futures. George, hello. To start off with, what do you make of these conferences? We had Davos recently, that was a big deal. Now we've had Munich. What sort of purpose do you think they serve?

George Friedman: Well, two, sometimes important leaders can meet with each other because they hadn't be there. They don't have to travel to one country other and don't have to have too much publicity about it. That's a secondary thing for many people. Simply being there, being able to say I was muted last week and I talk and that's a very important thing. But more than anything it shows the world leaders to the world. There's a possibility of sitting there and hearing the things they say and what they think. For many people that doesn't really matter much because talk is cheap. At the same time you get a sense of what's going on in the world if you look at it. And to have all these people get together at the same time and you're finding out what the leadership is worried about and you can compare it to what you're worried about, which is frequently nothing that they're worried about. It gives you a sense of proportion. Beyond that, not much.

Christian Smith: And I suppose, I mean it would be interesting to see what everyone else was talking about. What was everyone's priorities at that time?

George Friedman: Well, I suppose number one, to go home and look really heroic. That's one of the things they want to do. Secondly, to shop for the next job after they leave office. There are all these important things they have to talk about.

Christian Smith: Well look, we know that last year JD Vance turned up and basically had a go at Europe and then left. This year the US sent Marco Rubio. He's seen as a bit of a softer

touch. The message though was broadly the same. I mean, with all the diplomacy that's been going on, you know, shuffling between European capitals in Washington and vice versa since Trump came back into office last year, do you think that that has done anything? Do you think that US attitudes to Europe has softened at all?

George Friedman: Well, the United States feels betrayed by Europe now. The Europeans now feel betrayed by the Americans. The Americans were drawn into the Second World War very reluctantly. They were forced into it by the attack by Japan. Germany declared war on us. We lost a great deal in that war in Europe. And then after the war was done, we created an economic system so that Europe could revive, not out of charity, but stopping the Russians. We also devoted several generations of troops to standing guard at the Fuldegap, as they called it, facing the Russians down. Ultimately, the Russians broke. We left. At the same time, the Europeans expect the United States to maintain their condition, their relationship with Europe. The Europeans are now, as I've said before, the European Union is slightly larger than the Chinese economy. There is nothing in Europe that stops them from building their own defense. Yet they are claiming that the United States is in some way morally obligated to continue to expose at a time when the Europeans are quite capable, if they chose to do so, forming their own defense force. Now, the fact is that unlike the United States, where serving in the military is still an honor and airliners ask serving soldiers to board first, in Europe, there's no such culture. There's also not a desire to spend the significant wealth of Europe on defense. The Europeans feel the Americans are betraying them. Betraying them in the sense that the United States had an obligation to them. Over time, the American view is very widely held that the Europeans have betrayed us, that they kept us on the line and expect us to stay there even as their economic possibilities evolve, let our troops take the dangers, and so on and so forth. So this is not a one sided sense of betrayal. Although the media constantly is talking about how the Europeans feel betrayed, the Europeans don't really understand the degree to which the American feel that it's Europeans that are taking advantage of us rather than serving as our equals and defending themselves and so on. So this is a basic split in reality from the European reality. There's nothing better than to build a large economy and not have to spend it on defense. That's great from the American point of view. We have spent 80 years defending Europe. They have evolved because of our defending them as well as creating various economic systems that enrich them. It's time for them to, if not ante up to us at least take care of themselves. The Europeans have a view that the United States has a fundamental obligation, if you will, to remain the guarantor of European liberty. This is a reasonable thing for the Europeans to want. It is reasonable for the Americans to want to disengage. So two reasonable

positions, both in the self interest of each side, are taking place. Mutual contempt is all too human.

Christian Smith: So you don't think, though, that there's much to read into the fact that the government in Washington sent Rubio rather than Vance. Again, say, for example, who's seen as more diplomatic?

George Friedman: Well, diplomatic is a kind of European concept. You know, when you invade France, be polite when you do it. So this kind of notion of politeness when the Europeans are, from the American point of view, one of the most savage people on earth, constantly at war with each other until the United States stopped it all savagely fighting, behaving badly, but always with politeness. So the Americans, I mean, there is a fundamental cultural difference between the United States, how it perceives itself and Europe and the Europeans, how they perceive themselves and the United States. It's like a bad marriage. It was a really good one for a while, but as they grew up, there were issues. One wants to remain married, you're obligated. The other wants a divorce, and not a complete divorce will still be good with the kids, you know, and this is a human process. The Europeans became prosperous under this regime, this situation. The United States prevented a war with the Soviet Union, also in their own benefit. But now we depart. Now, this can be a peaceful separation, or in the European tradition, a savage one, but it's got to be one.

Christian Smith: I mean, Rubio himself said in his speech last week that he wants to work with European allies on defense. Obviously, the US Wants Europe to defend itself and bear its own weight more. What would that actually look like, do you think? What level of commitment would the US Want from Europe into percentage spend on defense, as is often talked about? Is it more just that the US is sort of going to still be friendly, but really they're out sort of thing. Well, what's the. What do they actually want?

George Friedman: I think the fundamental issue for the United States is there's no such place as Europe. It's a continent, 50 nations, all with bad histories with each other, all speaking different languages, different cultures maneuvering against each other. In other words, the first thing we'd like to do is see Europe grow up or stop calling themselves Europeans as if they were single people. So we have good relation with the British and we Always will. Whether we want to have really good relationships with the Poles, well, that's another question. So one of the problems in this entire discussion is that we use the term Europe to cover nations that are vastly different economically, socially, culturally and interests. So one of the problems we have is what do you mean when we say Europe? And that is for most people, for Europeans,

northern Europeans, it's NATO. They don't worry about those non NATO countries out there that are also there. So from the American point of view, however, is the threat to Europe is over. The Russians failed to take anything but a small fraction of Ukraine. They are not going to be able to invade Europe, primarily because the Poles are becoming a massive military force and they're the first ones that are blocking them. Therefore, the reasons that the United States to some extent sacrificed for the Europeans, with many of us serving in Europe drafted in and so on and so forth, and the Europeans liked that, and they thought that was quite part. On the other hand, what the Europeans didn't do is the hard work of coming together, if not as a nation state, at least all of Europe becoming part of the same sort of entity. And they didn't do that. And they're very content not doing that and then saying that we're not strong enough, our economies are not strong enough to do this. Well, if we talk about Europe, then collectively their economic power is significant. Their ability to build their own defense forces are significant. The fact that their culture does not mean that French and German soldiers get to board the aircraft first, well, that's a cultural issue that they have to work out. If the United States would continue its role, they could put this problem aside. They would never have to face it. And the basic thing the Europeans don't want to do is face the reality there is no such thing as Europe as a country. It's a continent. And on this continent there are almost 50 independent states. And they've got to have to make some very hard decisions. And that's the last thing Europeans want to do.

Christian Smith: I mean, if you look at Europe, say, as, rather than being independent states, but if you take it as NATO, perhaps as the rest of NATO, without Canada, of course, or perhaps as a bloc opposed to Russia, does that change anything, do you think?

George Friedman: Well, we were opposed to Russia when the Russian threat to conquer Europe was a reality, that would not be the American interest because that would put the Russians on the Atlantic coast and we didn't want them challenging us in the Atlantic. So partly it was self interest, partly it was a moral obligation. And we Carried it out. Europeans like to think of the Russian threat and constantly talk of the Russian threat, when in reality, if they couldn't take Ukraine, they're not going to take NATO. Okay. the same time, when you talk about the European armies in NATO, remember, we have 100,000 troops about deployed in Europe. Their own forces have limited capabilities. It's not because their economies can't support it. It's that they've chosen to spend their money on other things like social welfare and stuff. So at this point, the. You have two entities, I won't call them countries that feel betrayed. The Europeans feel betrayed because we want to change our relationship with Europe and make Europe take care of itself. The Americans feel betrayed because the Europeans seem to

think that we have a moral obligation to continue our role in Europe as it is, given the changes. And in the end, the Americans have the high card because they can leave. They have an option. The Europeans can't leave. They're there. So we have here the kind of a fundamental geopolitical reality. Europe is not what it was in 1945. It is far evolved. The geopolitical reality turns into a political reality. The Europeans don't want to give the economic sacrifice they have to do, nor the military sacrifice they have to take in. From the American point of view, you guys are on your own. Russia is not a danger, and we're prepared to leave. From the European point of view, if you want to quote, there's not one European point of view, this is a betrayal. From the American point of view, this is exploitation by the Europeans.

Christian Smith: Is there not an argument still? Because, of course, as you say, it wasn't a moral thing after the war for the Marshall Plan to defend Europe and things like that. It was in large part to stop the Russians. But isn't there also an argument that part of that is part of European security is in America's interest because it allows Europe to be a wealthy part of the world economy? They're wealthy buyers of US Products. Obviously, Trump's very keen on increasing exports rather than imports. Free trade, freedom of the seas around Europe, things like that, obviously fundamental to America. Is that not therefore in America's interest as well?

George Friedman: Certainly it's in our interest, but at the same time, it's our risk. You're going to put our guys out there. The full gap is gone. Germany is one country. There's plenty of economic capability. It is buying things in the United States is also selling things to the United States. There's a balanced trade or close to it. And at the same time, the question really is a simple one. The World War II ended 80 years ago. The savagery of Europe has been healed. Europe is now collectively an economy larger than China's. Grow up, make peace with each other and go forward. This is a normal process. A norm exists. The foundation of the norm is obsolete. One nation or one person decides, okay, this is obsolete. I'm going to go a different route. This is seen as an abandonment of a basic moral obligation. This was not a moral obligation. This was a strategic obligation for the United States benefit. That being done, we move on. And that's hard to do psychologically.

Christian Smith: Take a moment to follow and rate us on your preferred podcast platform. For video versions of the show and much More, subscribe on YouTube [eopoliticalfuturesgp](https://www.youtube.com/eopoliticalfuturesgp). Click the link in the description below to gain access to our full 2026 forecast. Re anchoring the world complete with geopolitical predictions, maps and graphics from our global team of analysts. I mean, the US position is obviously fairly clear. What do you make of the European response so far? I mean you could set a starting gun at this time last year. You could see that a few years ago. I mean, is Europe still falter, do you think? Or is it perhaps more. It's unfair

because change doesn't come so quickly. A year is a short time in world history. This is a fundamental shift of things. And of course the US is, well, the Europeans are tied, integrated closely with the American military, American defense. The British in particular are very closely entwined with their defence capabilities.

George Friedman: The answer is stop using the word Europe. The Polish view of it, the Hungarian view of it, the Italian view of it is very different from the British point of view. And these are different countries. I mean, we don't have a relationship with Europe. We don't have an ambassador to Europe, they don't have an ambassador. The point is that Europe is a fragmented area of very different people. And the question is not what Europe thinks because the Europeans have very many different thoughts on this. But for example, what do the Poles think, what do the Hungarians think? So on and so forth. They have different thoughts on all of this. Okay, what's happening here is that NATO countries, which there are only the northern European NATO countries, not Britain, France, Germany particular, seem to be feel that there's a long term obligation the United States has that's not necessarily in its interest, but sort of a moral obligation. And from the American point of view, we have fulfilled that moral obligation if there was one, rather than interest, self interest, and life goes on. But what's really critical to understand is that I was in Serbia not too long ago. They have a very different view of the world than the French do. So when you talk about the European point of view, you're acting as if this was a single community of like minded people of same cultures and so on. This is a vastly different area that first must heal itself. Because the history of Europe, as I said, and not jokingly, is vicious. The history of Europe is endless vicious wars, hatreds and distrust of each other and so on and so forth. The fundamental question history today is not what the United States is going to do, it is what Europe is going to do to overcome its own history. Simply saying Europe as a place is misleading. So I would argue that there's a burden on Europe that most serious Europeans understand, but they can't solve. So they have one economic system, the European Union, one military system, NATO. Not everybody's a member of either. Some remember of one, not of the other. Okay, you can go back to your old model of nation states in the region. You can become a United States of Europe in some way, but that's your decision, not the American. And so people tend to say, what is America's relationship to Europe? The answer is a different one to Britain. The US and the British are close and remain close with the Poles. The United States have a very good relationship. They understand the importance of Poland, France and Germany. What's our interest there? Italy, so on.

Christian Smith: So that's interesting. So, I mean, there's a lot of talk about European NATO perhaps or European Union in particular is very much pushing through some form of defense

fund or trying to. And obviously problems emerging with that. Do you just think that that is unlikely to actually work?

George Friedman: Well, given European history going back to the Roman empires, there has never been a united Europe. There's been conquered Europe, but not a united Europe. At the same point, Europe is at the crossroads of history. They fought two world wars, brutal wars. They came out of it wrecked, economically exhausted, morally and nationally. The United States in effect stood guard for 80 years. They've taken that as the norm, as it should be. Europe now has to grow up and face itself. Are we going to return to the model pre1945? Are we going to build a new model? And all these countries want a new model of Europe based on their interests, which are not the same, and not wanting to make the very painful decision, is there a united European culture, different languages, but the same interests and the same cultures? And there is the fundamental issue that one cannot easily be overcome. And the effort to overcome it in each country would be painful beyond belief. At the same time, they say, okay, we have this problem, we can't really unite, and so on and so forth and be effective. So United States just stand guard, keep guard and fill the gap. And the Americans are saying no. And it's not unreasonable for the Europeans to want this, nor is it unreasonable for the Americans not to want it. And so we go.

Christian Smith: I mean, what would the consequences be of Europe failing to build that defense, a comprehensive defense capability? And I know what you're going to say, George. You're going to say, don't say Europe. Okay, what would be the consequence of France and Germany not building proper defense?

George Friedman: When you talk about proper defenses, you're talking about Britain, France, Germany and Poland. There's about 46 other countries here in

Christian Smith: Europe and one man in Finland with a rifle. Because they stop the Soviets.

George Friedman: Well, the, the point is that there's a reality that the Europeans have trouble absorbing. The Russian army showed itself to be a failure during the Cold War. There were many people arguing that the United States is overstating the threat of Russia, that it should not be so hostile to Russia, they should make detente, and so on and so forth. And the Europeans are very good at arguing that we're doing that now. Now they're panicking. So you have a different reality. And that different reality puts into question the question that was at the face of Europe for centuries. Europe is a continent. Can they live in peace with each other? Can they become together and defend themselves against a non threat from the Soviet Union? It's gone from Russia. And that's a very painful thing politically. It's not easy for a single

country to be formed out of France and Germany, given their histories. And these are things the Europeans are going to have to deal with. And there's something, I'll overstate it. Infantile in the inability of the various European countries to recognize a new reality and blame daddy for the problem. So nations do what's in their best interest. It was in the best American interest to protect Northern Europe from the Russian intrusion, Western Europe particularly. And now that's gone and we have other interests. And that this seems like a betrayal. Well, every divorce is a mutual betrayal. But this can be a happy one if done properly.

Christian Smith: Obviously, as you suggest, Europe feels betrayed. And of course, Trump is often a very easy target for senses of betrayal and outrage, rightly or wrongly. But is it fair to blame him for this? As I know you'll say, George, this is an Inevitable change in geopolitics. But what about the way he's handling it? And could that have a wider impact? Or do you agree with Mark Rutter, the head of NATO, that Europeans, the underlying imperatives for Europeans aren't going to change there?

George Friedman: Well, I think personally, Trump's behavior is obnoxious. I also find the European behavior more polite, but also obnoxious. Their unwillingness to see the reasonableness of an American withdrawal from all of its vulnerabilities in Europe, given the current situation, is a willful inability to grasp the reality. In other words, the Europeans know the reality. They just don't want to grasp it or admit it. Trump, on the other hand, and possibly the only kind of president that could break the norm, would be one who is deeply offensive in his personality, is there. I regard Trump as an unpleasant man doing the thing that any president would be doing now. I regard the Europeans as equally unpleasant, if more polite. The Europeans are also very obnoxious in claiming that a foreign nation that has done so much for them has an eternal obligation to them. The claim by the Europeans is sort of a moral obligation on the United States to remain, even when we are not needed, even when the Europeans are there. So do I find Trump personally offensive? Yeah, I think many of the things that he does domestically should not be done. And I don't like the way he talks about. I don't like the way the Europeans talk either. I don't like the politeness under which there is a fundamental aggressiveness, the aggressiveness being the aggressive claim of an obligation on a foreign nation that has served that obligation for 80 years and feeling that somehow it was not reality but the United States that betrayed them. Different sorts of obnoxiousness. One very polite, one very impolite, but each speaking in the interests of their region or their countries. And of course, it'd be useful for the Europeans for the Americans to bear the burden. And of course, the Americans don't want to keep bearing the burden. So when you look at it that way,

the question of his personality is important. The question of the European personality in this matter is also important.

Christian Smith: And it's interesting to see a number of European leaders. British Prime Minister Sakiya Starmer said at Munich that he thinks Europeans have been too slow on spending on defence. Perhaps Britain's not the best example because it's somewhere between the two, but other European leaders have suggested similar things as well. So in that sense, perceptions are changing from a European point of view. And just to finish, George, I suppose on the one Hand, if you say that, yes, Russia has not done well in Ukraine. It's very unlikely that they'd be successful in an attack on NATO, depending on the variety or the sorry, do that again, depending on the extent of it. But Russia has engaged in hybrid warfare, for want of a better word, for quite a while now. Drone attacks randomly over airports, cyber attacks, interfering with elections, things like that. That's a real concern for Europe. Do you think that they are capable of dealing with that and of any kind of minor skirmish?

George Friedman: The Europeans, if they're not capable of that, do not have the right to being independent nations. They should be taken over by the United nations and treated like a third world country. But they don't want to admit that they can do it. But the important thing is to realize how weak Russia is. The Soviet Union is gone. Central Asia to southeast is gone and is having many inroads from the US And China being made there. It was part of Russia. The South Caucus is also part of Russia. Are now independent countries. Azerbaijan, Armenia and so on were part of the Soviet Union. So Russia is not the Soviet Union. Not just in a sense, it's not the communist country, but it's not the country it was. It's lost substantial parts of this country. The United States is extremely influential in the South Caucasus. That's a former part of Russia of the Soviet Union. The Americans are increasing their presence in Central Asia, also part of the Soviet Union. So apart from the fact that they did very poorly in Ukraine, there's also not an understanding that this is not the Soviet Union, that critical parts of it have been lost. It is a country vulnerable not only in the west as it was during the Cold War, but also toward the east and the South. So one of the ways the Europeans escape from the difficult choices is by denying reality. So if the Russians can't fight, they might have interfere with the way that some societies work, interfere somehow in some magical way, this way or that way. They invent threats that could be easily resisted. Hybrid warfare means I can't fight a real war, so I'll screw around with you somewhere on the edge. So throwing this question up, the Europeans have not faced this is not the Soviet Union. This is not the Soviet Union. Not just because it failed in Ukraine. It failed in Ukraine because it is not the Soviet Union. And this is something that's very important to grasp. But if the Europeans grasped it, that would justify

the Americans leaving. Therefore, it's very important for the Europeans to create a Russian threat that obligates the United States to remain there. It's become a psychological game. But the reality is Russia is not the Soviet Union, not nearly as powerful. When you talk about the obligation for the United States to provide

Christian Smith: in the

George Friedman: event of nuclear war, a cover, well, the British have quite a few nuclear weapons they developed with the United States and they took it home. The French also have a large number of nuclear weapons, plus they're on submarines that are very difficult to take out. Okay, so the Europeans not only have their own nuclear deterrence, they are certainly in a position to develop a more powerful one that they choose not to is the European problem. And from an American point of view, leading myself out of seems offensive that they would expect us to do it.

Christian Smith: So you think though, George, just picking up on something you said. You think that the Russian threat that is being stated by Europe by reading something recently from the British army is perhaps overstated and it is in some ways a useful tool to discourage America from leaving Europe on its own.

George Friedman: For four years the Russians have fought a war. They have thrown everything they have into it. Believe it, because Putin expected this to be over in months. Four years into it, he cannot concede it. This is the reality. If the Russians had more force available, they would have used it, certainly, and they've thrown it there. And now drafting 50 year old men, taking mercenaries from Africa to join their army. There's a reality. And many Europeans I talk to say, well, you don't understand. What can the Russians become in 10 years? To which there are two answers. One, given their fragmentation, not much. Two, what will the Europeans become in the next 10 years? You've got 10 years, figure it out. So the conversation goes on. And if we weren't so close friends, if we weren't so entangled, this would be a much easier and more rational conversation to have. The problem is that the United States has a deep relationship with Europe. Not just historically, militarily and so on and so forth, but culturally. Many of us come from Europe or descend from people who come from Europe. So there's that idea that we're one culture. But there's not one culture in Europe. So which culture are we there? I was born Hungary, the Hungarians, not like other Europeans, believe me. So there is a sense of depth of relationships there. At the same time, what the Europeans ask for is like a son growing up. He's 34 years old and he still needs dad to give him his allowance.

Christian Smith: Have you been speaking to my dad? Well, George, look, speaking of Hungary, there is a big election coming up there in a few in a couple of months, which it'll be great to do a podcast on that as well. But for now we will leave it there for this episode of the podcast. Thank you very much for listening. George, thank you very much for your time as always. We'll be back again soon with another episode. If you haven't already. Please subscribe to the channel on YouTube or wherever you get your podcasts. It really helps us out and give us a rating too, if you'd like to do that. Thanks very much for listening. Bye bye.

George Friedman: Thank you.

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