



Trump, tech and transatlantic Turbulence

European View
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Abstract

It is the world turned upside down. The Trump administration is warming up to historic enemies, starting with Russia, while taking a hard line with allies such as Mexico, Canada, Ukraine, and the EU. Europeans, in response, are questioning the survival of the transatlantic alliance, the backbone of the post–Second World War era. Although the divide centres on security, conflicts over tech and trade are mounting. The EU is racing ahead with strict rules designed to break up US tech ‘gatekeepers’, regulate social networks and ensure the safety of artificial intelligence. The US is sprinting in the opposite direction, promoting unbridled free speech, aggressive deregulation and destructive tariffs. China could end up the big winner. As transatlantic ties frazzle, Europe could close the door to US tech and become dependent on Beijing. China’s recent launch of a powerful, low-cost artificial intelligence model makes it a potential partner. The US, in turn, is jeopardising its biggest export market. Both Brussels and Washington must move back from the precipice. For Europe, the path forward means embracing tech, including US tech, not fighting it. For the US, it means allowing Europeans to regulate without threatening disastrous retaliation. And for those in Silicon Valley, the best strategy is to stay neutral and work as peacemakers, avoiding the temptation to side with Washington against Europe.

Keywords

Tech, Artificial intelligence, Digital regulation, Competitiveness, Tariffs, China

Introduction¹

A transatlantic tech war has erupted. Donald Trump has returned to the White House and doubled down on his criticism of European regulation. He has signed a memorandum to defend US companies from what he calls ‘overseas extortion’ and imposed retaliatory

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tariffs (Datta 2025). He has also picked a ‘warrior for Free Speech’ to head the Federal Communications Commission (Trump 2024). The nominee, Brandon Carr, has the new European speech rules in his sights, which he considers to be ‘censorship’ (Bologa 2025).

For Europeans, Trump’s threats are existential. Just as Europe is contemplating giant investments in defence, it must grapple with the danger of US tariffs. Europeans face increased taxes and cuts to their cherished social programmes to pay for military spending. While Europeans recognise that they must prioritise competitiveness over increased regulation, they are losing trust in US products and embracing home-grown alternatives in a quest for ‘digital sovereignty’. Americans also face enormous risks. The transatlantic economic motor drives the global economy: the US trade in goods with Europe remains almost 40% higher than US–China trade, reaching an all-time high of \$946 billion in 2023 (Hamilton and Quinlan 2024). European investment in the US totalled \$2.4 trillion in 2022, creating more than 3.4 million American jobs (European Commission 2023).

Tech has moved to the front lines. Silicon Valley has invested billions of dollars in Europe. European engineers created many iconic tech products, from Skype video calls to Google Chrome. Danish engineers built the browser’s revolutionary JavaScript engine. A German engineer invented Google Translate. A transatlantic digital divorce will be painful, even tragic. The win–win relationship will become a lose–lose. While a complete split can still be avoided, the conflict threatens to leave deep scars.

From tech truce to tech war

How did we become embroiled in a transatlantic tech war? In one sense, it is not surprising. The conflict is rooted in tech history. When the Internet was invented, it was magic—type a couple of words on a screen, and the answer popped up. Best of all, the magic was free. The World Wide Web united the world in a single, seamless, digital network. Hard-to-find information was suddenly at our fingertips. Difficult-to-access songs and shows from anywhere in the world suddenly became available. The Internet promised to break down the walls of privilege, even out opportunity, and spread democracy and freedom.

This idealism has now vanished. Cuddly startups have become digital giants that threaten our privacy, drown us with extremist hate speech and polarise our politics. They have upended industry after industry—music, publishing, banking, law and others. Silicon Valley’s wunderkinds face pointed questions. Are they dangerous monopolies abusing their power? Are they pervasive invaders of personal privacy and providers of platforms for subversive, dangerous extremist content?

During the past five years, the EU has responded to these threats by passing a raft of potentially revolutionary laws regulating digital companies. The Digital Services Act (DSA) requires giant Silicon Valley platforms to take additional measures to combat illegal hate speech and disinformation (European Commission 2025c). The Digital Markets Act labels key US companies ‘gatekeepers’ under strict anti-trust rules (European Commission 2025b). The AI Act represents the world’s first binding regulation to ensure

safety in the artificial intelligence (AI) race (European Commission 2025a). These laws enjoyed a broad political consensus, and many have been copied worldwide, reinforcing the much-vaunted ‘Brussels effect’ (Bradford 2020).

As Europe regulated, the Biden administration stayed silent. In private, US officials agreed with Europe: Apple, Google, Meta and other Silicon Valley behemoths were stifling competition and needed to be reined in. While US political divisions prevented the enactment of European-style digital legislation, President Biden took executive action. Administration officials urged social media platforms to take down vaccine disinformation and terrorist propaganda. The Federal Trade Commission blocked Silicon Valley mergers, and the Department of Justice filed anti-monopoly lawsuits against Amazon, Apple and Google (Yousif and Fleury 2024). Biden’s executive orders aimed to minimise the dangers of AI.

Tech leaders became frustrated and angry. They turned against Biden and the Democrats. Some—led by Tesla, Starlink and X owner, Elon Musk—wielded their wallets, financing much of the 2024 Trump campaign. Musk alone poured more than \$300 million into the Republican campaign and plans to give away another \$100 million to groups controlled by the Trump ‘political operation’ (Schleifer and Haberman 2025). Silicon Valley titans showed up en masse to Trump’s 2024 inauguration, donating millions of dollars to the celebration parties (Slobodian 2025).

The Trump tsunami

In return for supporting Trump, Silicon Valley hopes to receive White House protection from US and European regulations. Top executives have derided European fines on US companies as a ‘tariff’ (Morris et al. 2024b). Some US companies, led by X and Meta, are wooing Trump by cutting back on content moderation. When Meta’s Mark Zuckerberg announced an end to fact-checking on Facebook, he attacked what he described as ‘European censorship’ (Körömi et al. 2025). His chief policy officer, Joel Kaplan, later described European fines on US tech companies as a ‘tax or a tariff’ (Haeck 2025). US tech leaders are complaining about the prohibitions and costs of the EU’s AI Act. Many have postponed releasing AI products in Europe (Lagercrantz 2024). Silicon Valley is also grumbling about Europe’s determination to claw back underpaid taxes. Apple CEO Tim Cook recently called Trump to complain about an EU ruling that forced Apple to pay Ireland €13 billion in taxes (Edwards and Leggett 2024). In response, Trump said he would not let the EU ‘take advantage of our companies’ (Tiwary 2024).

A showdown looks imminent. The European Commission has opened probes into Google, Apple and Meta for violating the Digital Markets Act (European Commission 2024b). These could lead to penalties of up to 10% of the companies’ annual global revenues. In 2024 the EU fined Apple €1.84 billion, acting on music streaming leader Spotify’s complaint that Apple restricted developers’ ability to point users to cheaper purchases outside the App Store (European Commission 2024a). Apple is reportedly set to face further fines for violating the new competition rules (Yun Chee 2024).

The EU's crackdown on disinformation represents another flashpoint. Behind its harsh words against EU fines, the Trump administration shares European fears about the concentration of power in Silicon Valley. Vice President JD Vance supported the Biden court cases against Big Tech, and the Trump administration has continued to push ahead with the legal offensive (Diaz 2024). But Vance and Make America Great Again Republicans rail against what they describe as left-wing Silicon Valley 'censorship'. They want freedom for disinformation to flourish, and they spread much of it themselves. And they are uncompromising in their distaste for Europe's DSA, which they consider European censorship.

Deep differences separate European and American definitions of free speech. The US First Amendment offers broad latitude, while Europe outlaws Holocaust denial and other specific forms of speech (Bologa 2025). Despite US charges, the DSA does not censor. 'Nothing in the DSA requires platforms to remove lawful content,' European officials insist (Pollet 2025). They are right. The DSA tackles illegal or demonstrably harmful activity—terrorist propaganda, child sexual abuse material and foreign-backed election meddling. It obliges platforms to sniff out and counter systemic manipulative tactics, particularly during elections. These obligations bear no relation to China's Great Firewall or Russia's platform bans (Bologa 2025).

Russia's use of paid TikTok influencers in the recent Romanian presidential election spooked European governments. The Romanian government ended up barring a far-right candidate from running (Rainsford and Gozzi 2025). Meta's decision to end fact-checking in the US (but not yet in Europe) has provoked a fierce European backlash.

The most volatile transatlantic content confrontation centres around Elon Musk and his social media platform X. In July the European Commission (2024c) ruled that X had breached the DSA, which regulates content hosted on online platforms. X failed to meet transparency and accountability rules, and its blue check marks were deceptive, the Commission charged. In response, Musk claimed that the regulators offered him an illegal secret deal to censor speech online and he promised a court battle (Kroet and Sanchez Alonso 2024). The Commission must now decide whether to impose punitive fines on X—the first under the DSA—of up to 6% of X's total revenue and 6% of the revenues of Musk's other companies, including Tesla, SpaceX and Neuralink.

Before imposing big fines, the EU must address a dangerous dilemma. If it acts against US tech, it could pour oil on a simmering fire. Officials acknowledge that European Commission President Ursula von der Leyen needs to give the green light to proceed. If the EU fails to act, however, it risks seeing emboldened US companies ignore its rules, reinforcing their monopolies and dominance.

Another giant risk for Europe is falling back into a dangerous quixotic quest for 'digital sovereignty'. Trump's election and America First policies have renewed European calls for Europe to build its 'own technology stack'. Others insist that Europe must learn to stand on its own two feet.

These reactions, while understandable, are misguided. Europe cannot go it alone when building a competitive tech sector. AI and cloud computing demand giant investments that European companies will struggle to provide. Such a move would be self-defeating. Amazon, Microsoft and Google own more than two-thirds of the European market (*Synergy Research Group* 2021). Europe needs US and Asian semiconductors: the continent accounts for just 10% of the global microchips market (European Commission 2024d). Europe will only succeed in building tech winners by competing against and working with Silicon Valley. It will not overcome its competitiveness challenge by discouraging innovative new technologies.

Avoiding a lose–lose confrontation

Transatlantic tech battles are counterproductive. The US benefits from a Europe that is strong, secure and prosperous. Europe depends on the US for defence and to stay competitive in tech. But the transatlantic relationship has become unbalanced. The US economy has been booming. US tech firms dominate the digital world and are racing ahead in AI. By contrast, Europe is struggling to produce global tech players, and its economy is flagging. It trails the US and China in innovation and growth (Hazemi-Jebelli 2024). Only 4 of the world's top 50 tech companies are European. The EU has not produced a company from scratch with a market cap of over €100 billion in the last 50 years. The US has produced six firms valued at over €1 trillion in that same period (Draghi 2024).

Europe needs to get its tech house in order. Regulatory uncertainty is slowing the rollout of AI products and services. The lack of clarity over European copyright rules represents a hurdle for European AI companies. If it proves impossible to loosen its restrictions on AI, Europe should at least simplify regulations to facilitate compliance.

Enforcement needs to be improved. Early efforts to enforce the General Data Protection Regulation, Europe's primary privacy law, have exposed how daunting it is to police the world's most influential tech companies. Several years after the law came into effect, critics have lamented the limited number of significant privacy court cases. Compliance continues to vary from country to country, with national regulators often fighting with each other. Irish regulators approved Meta's and other US companies' plans to comply with the privacy rules, only to be overruled by their German and French counterparts (Echikson 2023).

Many fear the new EU regulations could fall into this slow-grinding quagmire. To avoid this fate, a specialised Brussels-based team coordinates DSA and Digital Markets Act investigations across all 27 member states (Jaursch 2024). Another partial solution lies in cooperation between the Commission and the national Digital Services Coordinators. Yet the system remains slow (Bologa 2025). Several EU members have yet to appoint a Digital Services Coordinator. Since election disinformation can do incalculable harm in days, if not hours, a nimble approach is required, including early fines or interim orders. Bound by due process, European regulators must conduct a thorough investigation and provide a formal statement of objections, a period within which

companies must respond, a final decision and the potential right of appeal in the EU courts. This timeline is no match for social media virality.

As enforcement lags, Europeans acknowledge that they must jump-start their economies. The new European Commission is switching gears, away from regulation to a focus on innovation and competitiveness. That starts with tech. Catching up means embracing tech, not denigrating it (Nolan 2024). Former Italian Prime Minister Mario Draghi's much-cited report (2024) diagnoses Europe's lagging competitiveness and calls for fast completion of the much-ballyhooed Digital Single Market. Initially proposed in 2015, it has never been finished (European Council 2020). Digital platforms still deal with national borders and national taxes. Plans for a '28th regime', a single European-wide corporate statute, remain blocked. Without a single Europe-wide capital market, Europe's myriad startups find it difficult to scale up. Plans for an Investment and Savings Union should also be accelerated.

Just as Europe's ability to start on a new pro-tech path remains restricted, the Trump administration's love affair with Silicon Valley could sour. His first term was not known for promoting technological innovation. For Silicon Valley, Trump's lack of ideology regarding tech represents a double-edged sword. Trump 2.0 looks set to reverse some of Biden's aggressive actions, such as the anti-crypto lawsuits at the Securities and Exchange Commission and the anti-fintech rule-making at the Consumer Finance Protection Bureau. But Trump has in the past threatened legal action against Big Tech companies, including Google and Meta, accusing them of censoring conservative voices (Goodwin et al. 2024). During his first term, the Department of Justice started investigations into Amazon, Apple, Google and Meta on anti-trust grounds (Kang and McCabe 2024) and a federal judge has recently ruled that Google has abused its web search monopoly. Vice President JD Vance has praised Biden's Federal Trade Commission Chair, Lina Khan, and supports the breaking up of Google (Morris et al. 2024a). At the time of writing, Trump has not withdrawn any of the anti-trust cases against Google, Apple or Amazon.

Conclusion: a path forward

Conflict over tech will add to looming transatlantic divergences over trade and climate change, not to mention Ukraine and defence spending. The launch of a tariff war represents an immediate threat, with Trump warning that the EU will 'pay a big price' for not buying enough US exports (*Reuters* 2024). He has imposed tariffs of up to 20% on European goods. Currently, the average US tariff for European imports is 3%–4%. High US tariffs could reduce EU exports by €150 billion annually (Bounds 2024).

Trump's election and America First policies have renewed European calls for digital independence. These reactions, while understandable, are misguided. Despite potential transatlantic turbulence, Europe will only succeed in building tech winners by competing against and working with Silicon Valley. It will not overcome its competitiveness challenge by discouraging innovative new technologies.

If transatlantic ties frazzle, Europe could be driven into increased dependence on Beijing. China's DeepSeek demonstrates its ability to compete in AI and advanced semiconductors. If spurned or angered by the US, Europeans could turn to China.

This is not a forgone conclusion. The EU accepts that China and the US are not the same. Brussels is overcoming its historic reluctance to confront Beijing. The EU recently imposed tariffs on Chinese electric vehicles and is investigating whether Chinese wind turbines disrupt fair competition (Cytera and Lagercrantz 2024). The Netherlands has responded to US pressure by forcing its flagship semiconductor supplier, ASML, to stop shipments of its most advanced technologies to China. In addition, Europeans have forced China's Huawei out of many of its telephone networks in response to US demands (Kroet 2024).

Europe remains divided. With extensive business interests in China, Germany remains cautious and has whittled down the EU's car tariffs. Berlin has been slow to remove Chinese companies from telecoms networks that provide key infrastructure (Bütikofer 2024). Other European countries, led by Trump's favourite, Hungary, are welcoming billions of euros of Chinese electric vehicle investments. Europe needs to align internally to confront the Chinese challenge.

Pressure from the Trump administration could unite Europe, not against China, but against the US. Brussels already surprised many by agreeing to impose strict export controls on Russia after the Ukraine invasion. If the US turns inward, Europe will have to take the lead in this, doing its best to further surprise the world by coordinating controls on Russia and China, protecting data flows and securing reliable supplies of critical minerals.

The risks of a tech war for the US are immense. In return for the US's security support, American tech companies gained access to the world's most significant economic and trading blocs. With a belligerent US, Europe will be tempted to end cooperation and close the door to US investment. The Silicon Valley bet on Donald Trump could boomerang.

A definitive split is not inevitable. The Trump administration could realise that pursuing America First may produce America Alone. A new, less confrontational US president could be elected. In the interim, the best possible path forward looks like disaster control. Instead of simply taking Trump's punches, Europeans need to gather together and reboot their economies. They should reduce burdensome digital regulation and embrace tech without pursuing a counterproductive search for digital sovereignty, which could produce digital poverty. In the end, Europe and the US need and depend on each other for security and to stay ahead in the global tech race. Hopefully, the two sides will realise that they are better off together than apart and move back from the brink.

Note

1. This article was written with the research and editing assistance of Oona Lagercrantz, who was formerly a project assistant at the Tech Policy Programme at the Center for European Policy Analysis in Brussels. She has a first-class bachelor's degree and a master's with distinction from the University of Cambridge and specialises in the politics of emerging technologies.

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