



European Insights Forum Report

May 2025

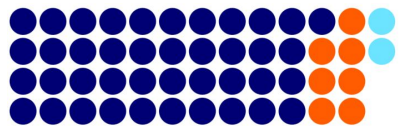


BOLDT × BPI



Message House × **BPI**

We spoke to 50 EU political and policy experts



41

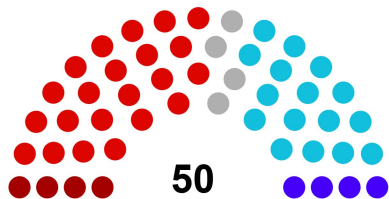
Former
MEPs

7

Policy/
Think Tank

2

Former EU
Commission



50

Political leaning of respondents

8%

Right

32%

Centre-Right

8%

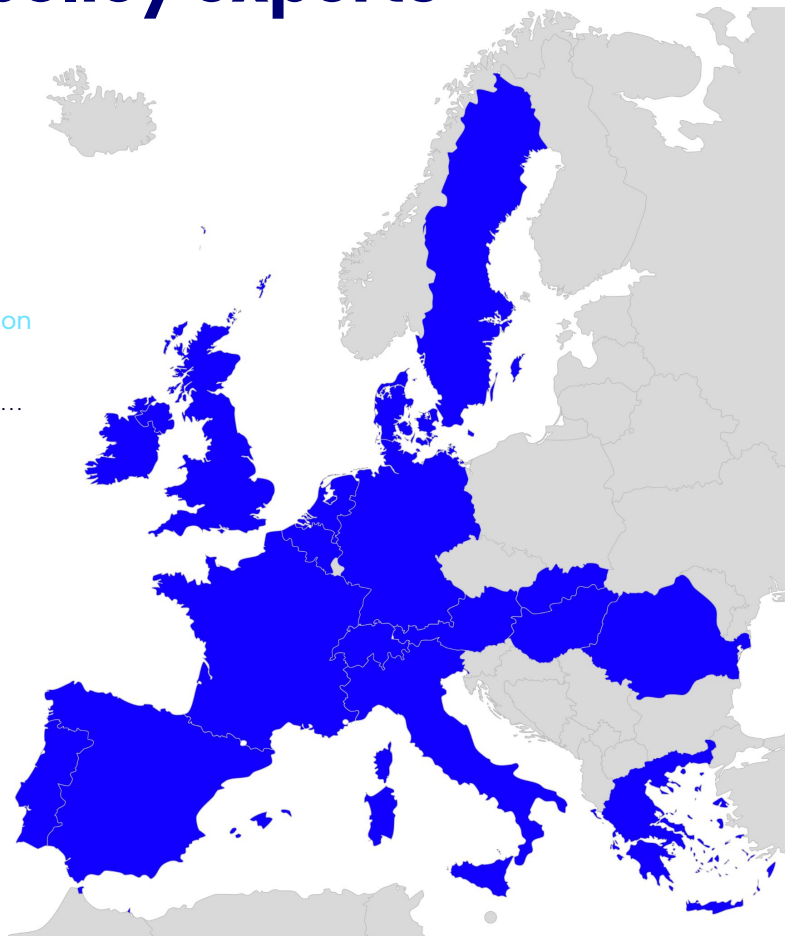
Centre

44%

Centre-Left

8%

Left



The media story...



Trump has blown up
the world order - and
left Europe's leaders
scrabbling

**Trump wants to
destroy the EU
— and rebuild it
in his image**

Donald Trump won't deal with the EU.
The EU can't deal with Trump.

NEWS > DEFENSE

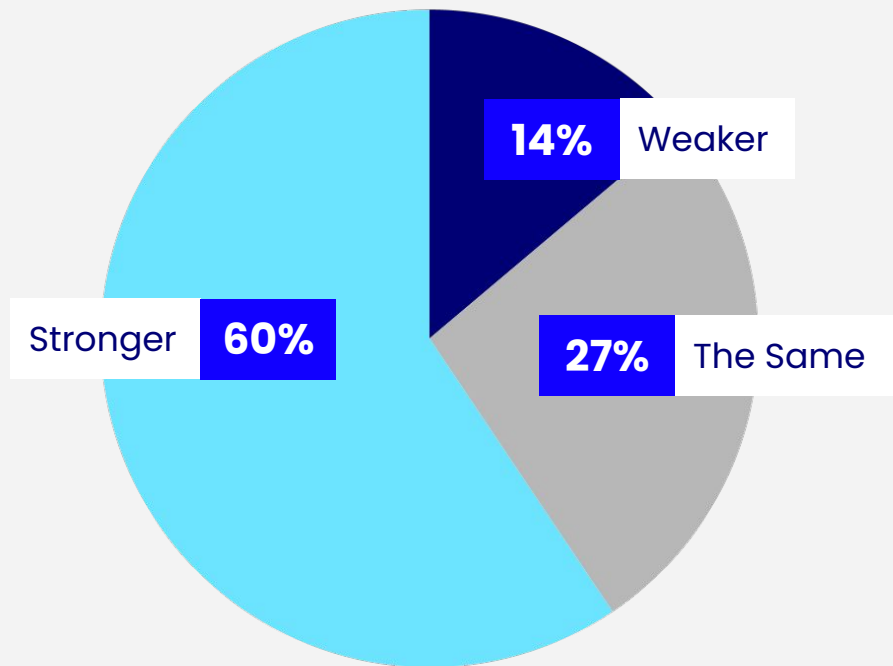
The EU is doing exactly what Trump wants. He still doesn't care.

As desperate European leaders beg the U.S. president to let them join peace talks, is he even listening?



Our Experts' view...

In 12 months' time, the EU will be...



“

The White House... It looks like the administration [wants to] **ignore Europe as an international actor**. On the other side **we can look at the situation also as an opportunity**... It's the [time] of taking big decisions for the European Union where we want to be independent [from] the historical transatlantic relationship.

Former MEP, Left, Spain

“

I think if the EU has not heard the wake-up call that we have now received in Europe, it will be too late. **I think we are now really at a crossroads**. We have to decide if we really come closer together and understand ourselves as one functioning block.

Former MEP, Centre-Right, Germany

An Opportunity to Change Europe for the Better?

“

It was always said that the Union was forged in crisis and because of the crisis, it emerged. **So if history has shown anything, it should pull itself together and deliver...** I think we have the instruments. We have the capacity, but we need to still find ways in which we can coordinate and fill in the security vacuum.

Policy/Think Tank, Centre-Right, Brussels





The Trump challenge – and opportunity

The focus of attention: Donald Trump

Trump is overwhelmingly top-of-mind – and **the impact of this administration is being felt across all issues**

These European leaders feel he has been underestimated, and that the EU has been caught **off-guard & unprepared**

Most see Trump as a major concern for the EU – when asked how concerning is Donald Trump's return to the White House to you on a 1-5 scale **83% gave a score of 4 or higher**



We have to be concerned about Donald Trump, in order to look for the answers and solutions. Because at this moment, Donald Trump is a problem for the world, so the EU needs to be the solution. He has a lot of power at this moment, because he's the President of the USA, but power without control is not useful.

Former MEP, Centre-Left, Spain



The focus of attention: Donald Trump

“

The Trump administration, as the first administration was, is not very keen on anything which smacks of multilateralism in any policy area... **this usually keeps the EU institutions flabbergasted. They just don't understand this... the EU could have prepared** for the second administration.

Former MEP, Left, Hungary

“

The most important thing is relations with the United States now because it's going to drive and affect so many other policies. And I think the problem is that, **despite knowing that Trump was going to come back for another term, the EU hasn't really got its act together at all, hasn't prepared itself properly.**

Policy/Think Tank, Centre-Left, Brussels



We tracked developments in real time

Many felt the **EU was on the back foot** following Trump's re-election

February

“

I think he puts at stake everything that we always believed is given or we have achieved with cooperation with international treaties. **I think it's a totally different world and no guarantees anymore.**

Policy/Think Tank, Left, Germany

JD Vance's speech at Munich Security conference heightens defence concerns...

March

“

JD Vance's ridiculous speech the other day at the Munich Security Conference was quite alarming actually and most commentators were horrified by it but he has got away with it in a way. And so this is part of the process of softening up Europe with a view to making it a much more Trumpist continent.

Former MEP, Centre-Right, UK

...as did news of **US negotiations with Russia**

April

“

I think very clearly the Trump government or administration... is very clearly a huge challenge to the European Union, if not to the free world. Of course, **in addition to the tariffs which they are levying not only on Mexico and Canada and China, but soon also in Europe that will drastically impact world trade.**

Former MEP, Right, Germany



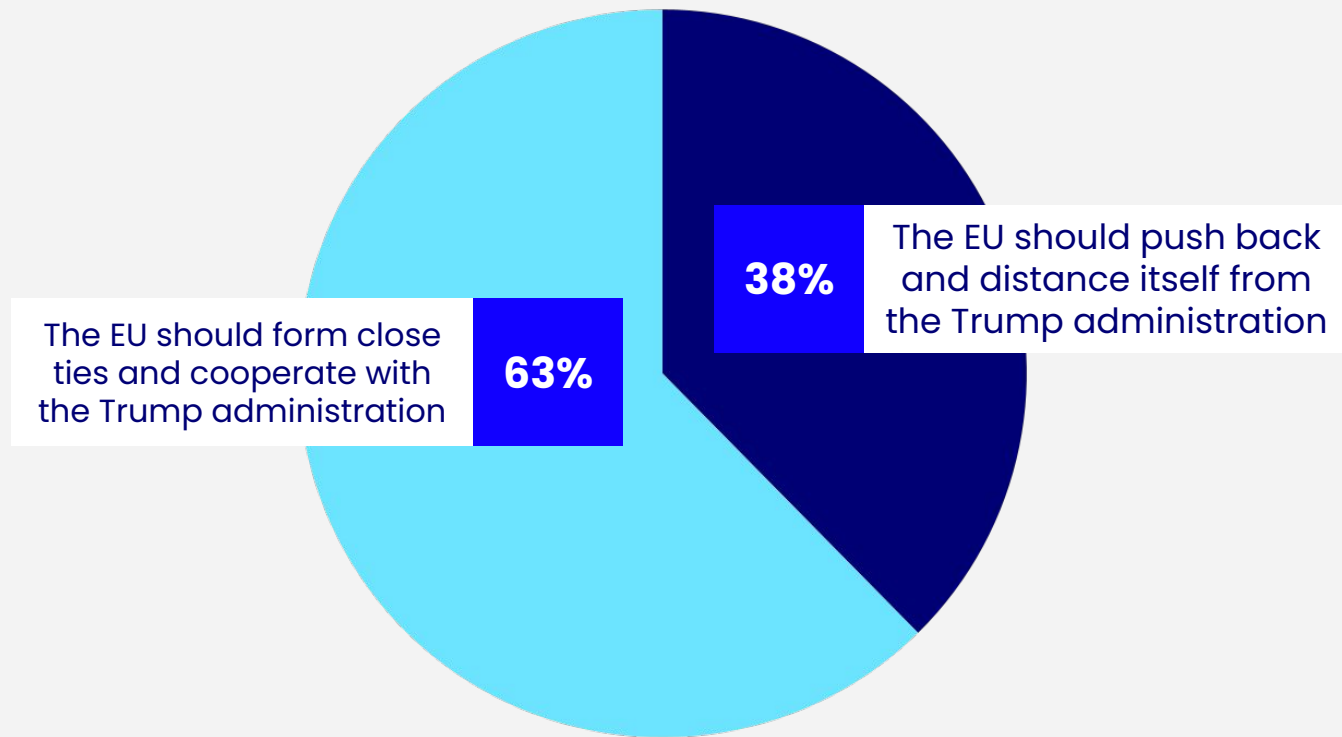
**What should
Europe be doing?**

What should Europe be doing?

Despite high levels of concern, most still prefer co-operation than challenge...

63%

wanted to see the EU forming close ties and cooperating with the Trump administration



What should Europe be doing?

75%

of those on the political right were more likely to prefer a closer relationship

Most still wanted to prepare in case of disagreement on issues of security and the economy

Those on the left were split

50/50

While they recognise areas where collaboration is necessary, many want the EU to close ranks to protect core values that are under threat from Trump administration – e.g. DE&I and sustainability

“

Two things have to happen. One, it has to have a very close relationship, but secondly has to be prepared – which I think it is in a circumstance of the worst outcome, pulling out of Ukraine, a very detrimental tariff regime, furthering positions on travel. I think it is ready for that, frankly.

Former MEP, Centre-Right, Ireland

“

I'd be more on the EU should push back... a lot of it is to do with values. **I don't think you should be diluting our values...** sometimes you just have to stand up and be counted.

Policy/Think Tank, Centre-Left, Brussels

The other big challenges facing Europe

1

European Security

3

The State of the Union

2

The Economy

European Security

80%

of respondents raised security and defence as an urgent challenge currently facing the EU

Under the existential crisis of the Ukraine war & weakening of US military support in Europe, **respondents believe there has to be a push towards European rearmament**

This heightened concerns about the EU's capacity to expand **defence spending and manufacturing** capabilities to ensure that the EU stays relevant on the global stage

Respondents also felt that recent security developments within Europe has **narrowed the gap between the EU and the UK**, as well as other non-EU nations such as Norway



European Security

“

Ukraine

My assessment on Ukraine. It was too little and too late... now **the big risk of the European Union is that we are less and less important.** [The US] do their big things between Russia, China and us. And **who is the loser of the game at the moment? It's the European Union.**

Former MEP, Left, Germany

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Defence Spending

Probably a more ambitious industrial policy. Maybe relaxing on some debt when it comes to **defence spending.** So we see a lot of **measures which are being currently discussed that were absolutely not on the agenda six months ago.**

Former MEP, Right, France

“

Rearmament

China has Chinese companies, Russia has military – What do we have? **We don't have an army, we don't have security or defence.**

Policy/Think Tank, Centre-Left, Spain

“

Innovation

If we achieve a clever approach, **we can do something similar to what the Israelis are doing – trying to link innovation and defence...** So, those obviously are going to have an impact on our fiscal capacity. But I do think the long term could be a positive and it could be a good way to push growth and jobs.

Former MEP, Centre-Right, Spain

The Economy

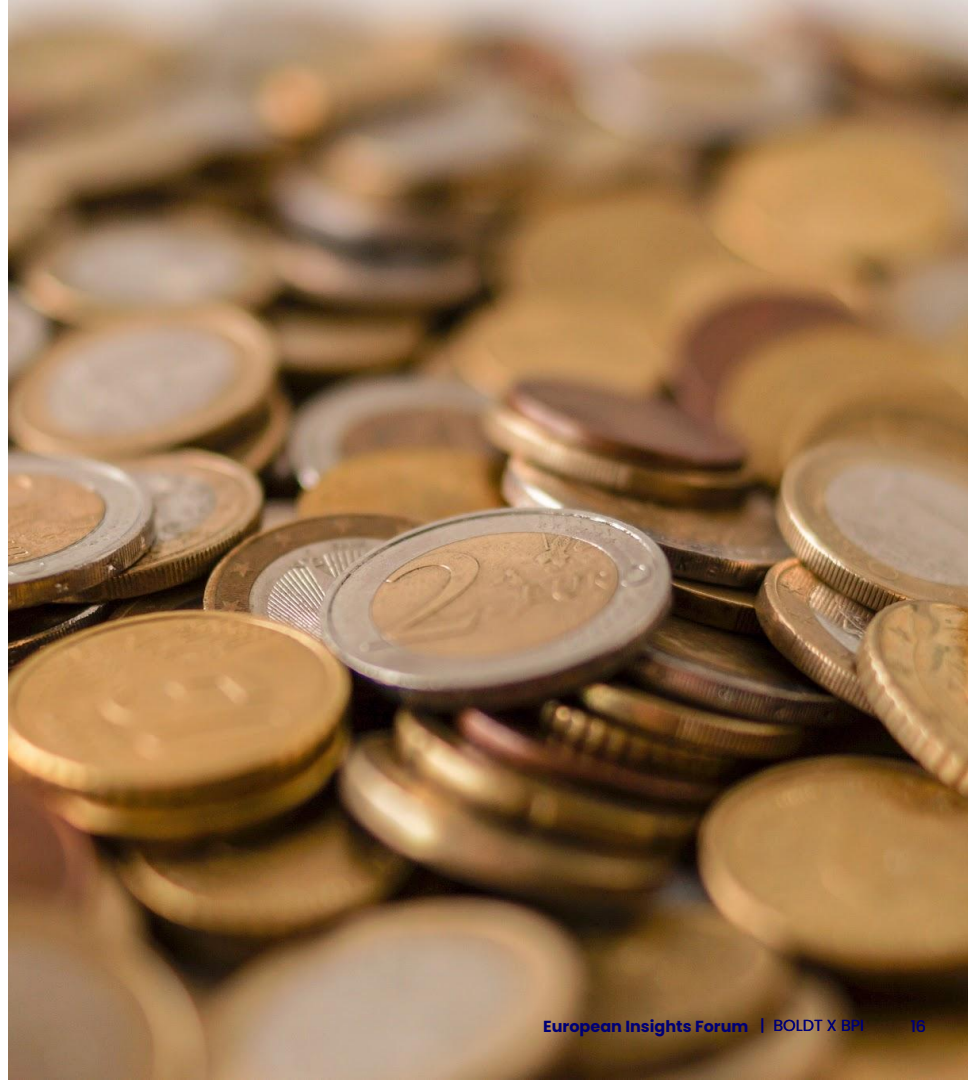
78%

saw Trump's impact likely to be biggest on **economic issues**, such as Trade, EU/US Competitiveness and Tariffs

EU **competitiveness was a concern pre-Trump** but threats of trade wars, and the need to fund more defence spending, refocused attention on the economy

A few saw the EU having **an opportunity to capitalise on the economic uncertainty from the Trump administration**

Although Tariffs raised concerns, most felt the EU was strong enough to stand up – and when asked, **86% agreed that the EU had responded in the right way**



The Economy



Competitiveness

The competitiveness issue is a very strong priority because of the difference between the European continent and the US, and China... **we are lagging behind in tech, in growth, in energy... there has been awareness that something has to be done.**

Former MEP, Centre-Right, France



Competitiveness

The keyword for the next five years is competitiveness. How to improve the industrial landscape in Europe. How to improve strategic autonomy in terms of strategic industries... **To close or make smaller the gap between the EU and the major powers – the US and China.**

Former MEP, Left, Spain



American Uncertainty

It's really interesting to see some European investors that are really thinking about leaving the USA to come back to Europe, saying **the economic policy of Donald Trump is really too fluctuant and not understandable. There is no stability.**

Former MEP, Centre, France



Tariff Response

The EU has taken the right approach [on tariffs] and is cautious enough not to speak too strongly or too quickly. **It will be of the utmost importance to continue with a clear message and not to overreact.**

Former MEP, Right, Germany

The State of the Union

Long-standing criticisms of the EU remain – such as **bureaucratic** and **slow decision-making**, and **country leaders overshadowing EU institutions**

Many see that during a period of political weakness in France and Germany, **von der Leyen** and **Costa** have helped move the EU forward

Through the handling of Trump, **Macron** wins plaudits, there's optimism about **Merz**, and others like **Tusk** are also seen as **evidence of a stronger European leadership**

Closer cooperation between the EU and **Starmer** was seen as encouraging



The State of the Union

“

Thinking about Antonio Costa now as the head of the Council, you can **clearly see a difference from his predecessor in trying to make the EU speak with one voice**. Also, the current efforts of Emmanuel Macron even going to White House... It shows how much we are willing to make it work.

Former MEP, Centre-Left, Portugal

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If the US is gonna be the world leader, **it's really hard for [Trump] to be that when Europe is united** and that's why he doesn't want to meet von der Leyen and or Kallas or European leaders. But **instead he wants to meet national countries. Because then they are no match for the US**, regardless of economy, defence, trade. But it also looks like Europe is more united than he expected, with all the the emergency meetings going on.

Former MEP, Centre-Right, Sweden

Long-standing challenges have not lost relevance

1 Food and Agriculture

3 Migration

2 AI & Technology

4 Sustainability

Food and Agriculture

Just over half of respondents gave a score of 4+ out of 5 when asked how high of a priority this issue should be for the EU

Many mentioned the struggle between **farmers and the EU Green Deal** – seeing the Deal is **too inflexible and unrealistic in its targets**

- The **CAP** also looms large over discussions of agriculture – many see it as overdue for reform
- **Food security** was also a worry for some, and many connected food to questions of sovereignty and tariffs



One thing is that **we produce less than 20 years ago** in agriculture... if we consume more we have to import more and **when we are talking about raising the tariffs**... We really need to change the idea that agriculture is not only an economic sector, that is at the core of our living.

Former MEP, Centre, France



AI & Technology

AI is a major area of interest and a potential solution to **EU growth/competitive challenges** – AI and Digital Regulation was top-of-mind for 14% of respondents and many referenced **risks of AI impacting jobs**

Some are connecting tech/AI with the **Trump political agenda**, which is making a number push to hold firm or go further on regulation

Misinformation and **social media usage in elections** were both raised as concerns

“

It's AI and, of course, digitalisation... it's also the idea there will be no privacy. Despite the regulation which we have had, it is still the danger that the privacy would be at [risk]... **how many people will lose their jobs after AI will be more implemented.**

Former MEP, Centre-Right, Slovenia

“

This world views clashing of free speech in terms of technology regulation. **Technology regulation that is being pursued in Europe compared to what's being pursued in the US** and obviously with Elon Musk's grip on power, **this will become perhaps a bigger issue than one would have thought.**

Policy/Think Tank, Centre-Left, Switzerland



Migration

Migration was noted as a clear current concern for the EU Nations – which was **more potent around the time of the German elections**

Some felt there is a **lack of a solution** coming from the EU

“

Because of the wars all around Europe, people cannot live in their countries, they need to find security and peace, so they enter Europe. But Europe cannot sustain all this numbers that arrive in the EU member states. **There is no clear strategy on how to deal with this issue and what is even worse is that it has become an issue at the hands of the extreme right.**

Former MEP, Centre-Right, Slovenia



Sustainability

Sustainability is now being seen as **less of a priority** for the EU than previously & was mentioned by **14%** as a top challenge

However, many did highlight this as an **area of an opportunity for the EU**, and wanted to see a push to become the **global leader in sustainability and a centre for Green investment**

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There is really room for the EU to take a **more of a leading role in climate and sustainability** than perhaps ever before.

Policy/Think Tank, Centre-Left, Brussels



**Q. Where are European
leaders following the news?**

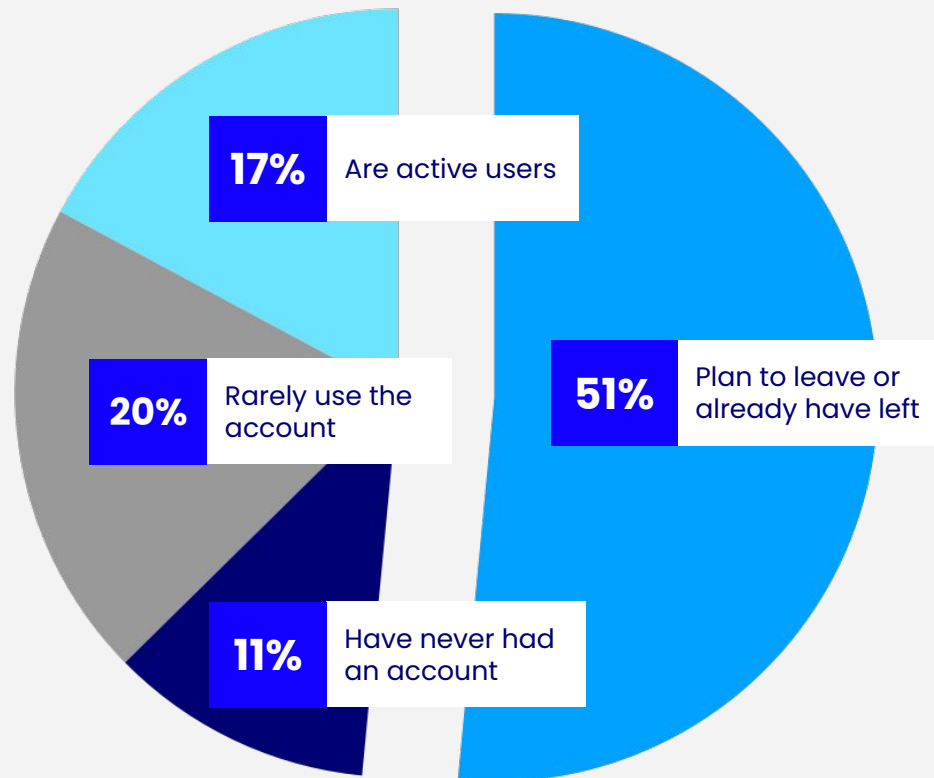
A. Not on X

Over 50% of respondents have already left or plan to leave X

“

It wasn't just about the ownership and the evident far-right algorithm orientation, it became a ghastly pond that one can't stand.

Former MEPs, Centre-Left, Spain



How do European leaders stay informed?

Regular face-to-face engagement is core for this audience to keep themselves informed

Respondents also feel having a presence in Brussels is seen as key for businesses to influence policy decisions

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The most important advice I give when it comes to the EU is to speak in very simple and plain terms... politicians always love to hear things about jobs, investment, ordinary people and their lives... And I think it's really important for those third country businesses to also explain how they're helping to achieve European objectives.

Former MEP, Centre-Right, Ireland

POLITICO



POLITICO

Easy, reliable source to stay in touch with the 'EU Bubble' – 30% mentioned reading Politico

Newspapers

International papers e.g. FT & NYT and nationals e.g. Le Monde or Deutsche Zeitung



F2F Meetings and Events

Key to understand the mood and mindset of professional networks



Social media & Podcasts

LinkedIn & Podcasts are growing sources for current events & news



EU Publications

The European Research Service and Parliamentary papers were helpful for additional detail

**Trump's arrival has
focused the spotlight
on areas of
pre-existing
weakness**

**Our experts
see this as an
opportunity for the EU
to come together
and address key
challenges**

**The majority
see the EU
stronger not weaker
by the end
of the year**

What is the European Insights Forum?

- The Forum is a network of political and policy experts being brought together by Message House BPI
- It is made up of former politicians, senior officials and influential policy professionals with expertise across a wide range of critical policy areas and issues
- They are all leaders who have been at the heart of European debates and decision-making over the last two decades and so are an excellent proxy for the views of current decision-makers
- We can utilise the European Insights Forum to provide clients with targeted advice and insights on the context around them and their issues, and reactions to their messaging and strategy. This can be as part of ongoing assignments or as a special report
- The Forum provides an essential tool to help organisations navigate a rapidly changing policy and political landscape effectively
- For more information contact Matt Carter at Message House BPI



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