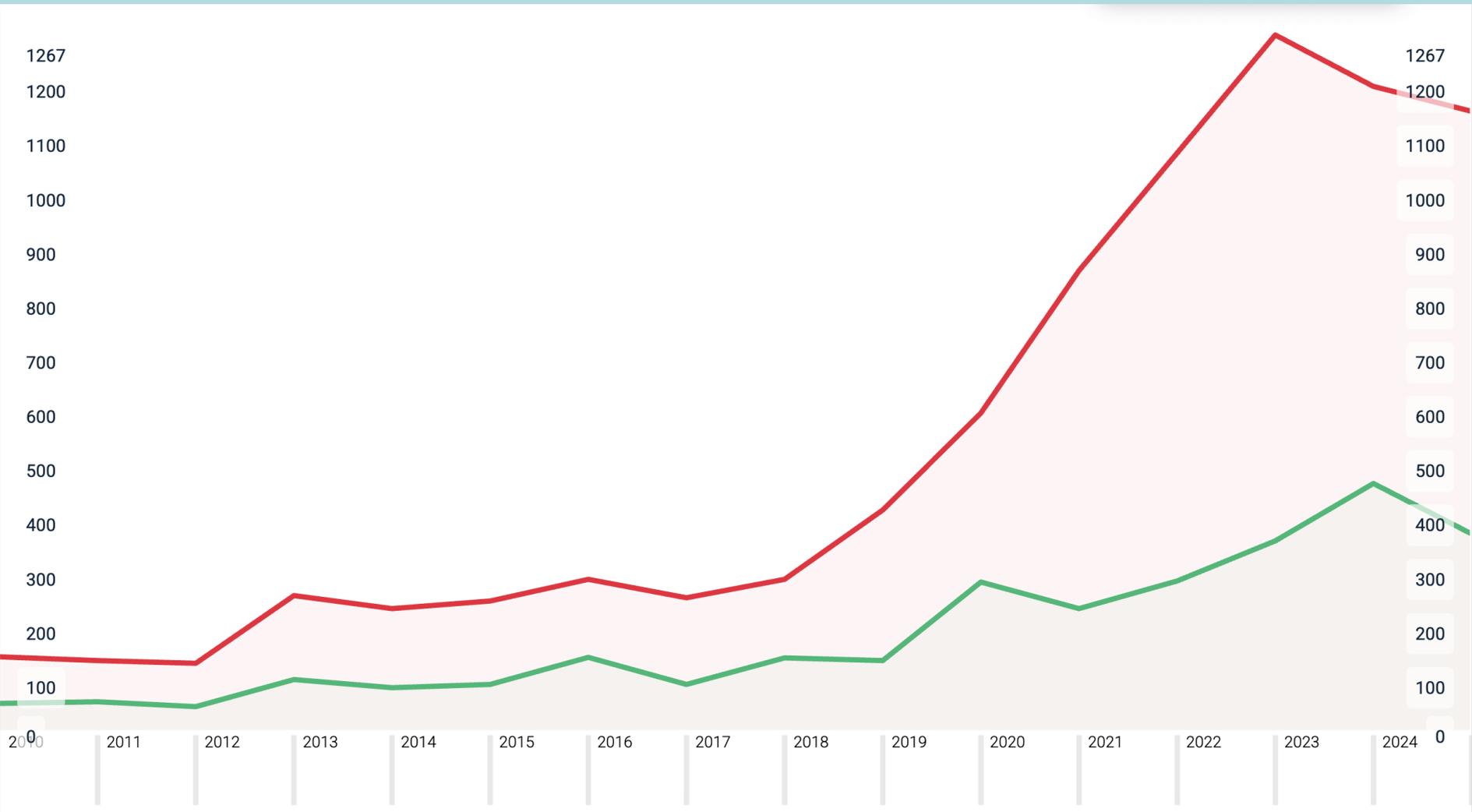


# La geopolitica dei dazi e la risposta UE

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Annual totals refer to numbers reported by today's date in each year. For the full data, visit the [Activity Tracker](#).

■ Discriminatory ■ Liberalising



**THE MONEY WAR**

**HOW FOUR U.S. PRESIDENTS UNLEASHED**  
**ECONOMIC WARFARE ACROSS THE**  
**GLOBE**

# 1. Non sono (solo) i dazi

- La 'novità' vera? Non è il ruolo dei dazi come strumento di politica estera (ne la loro proliferazione)
- Quello che cambia non sono solo gli strumenti di politica estera USA – cambia la concezione stessa di quello che costituisce la 'politica estera'

# Trade Risks – Tariffs

## Reasons for trade restrictions

(↑ = added by President Trump)

### Macro economic objectives

- Beating unemployment
- Stimulating domestic economies

### Protectionism

- Companies
- Specific markets (for example EV industries)
- Domestic industrial policies

### National security

- Importing high tech equipment
- Exporting critical products like semiconductors
- US Foreign Direct Product Rule



### Foreign policy considerations

- Immigration
- Drugs
- NATO

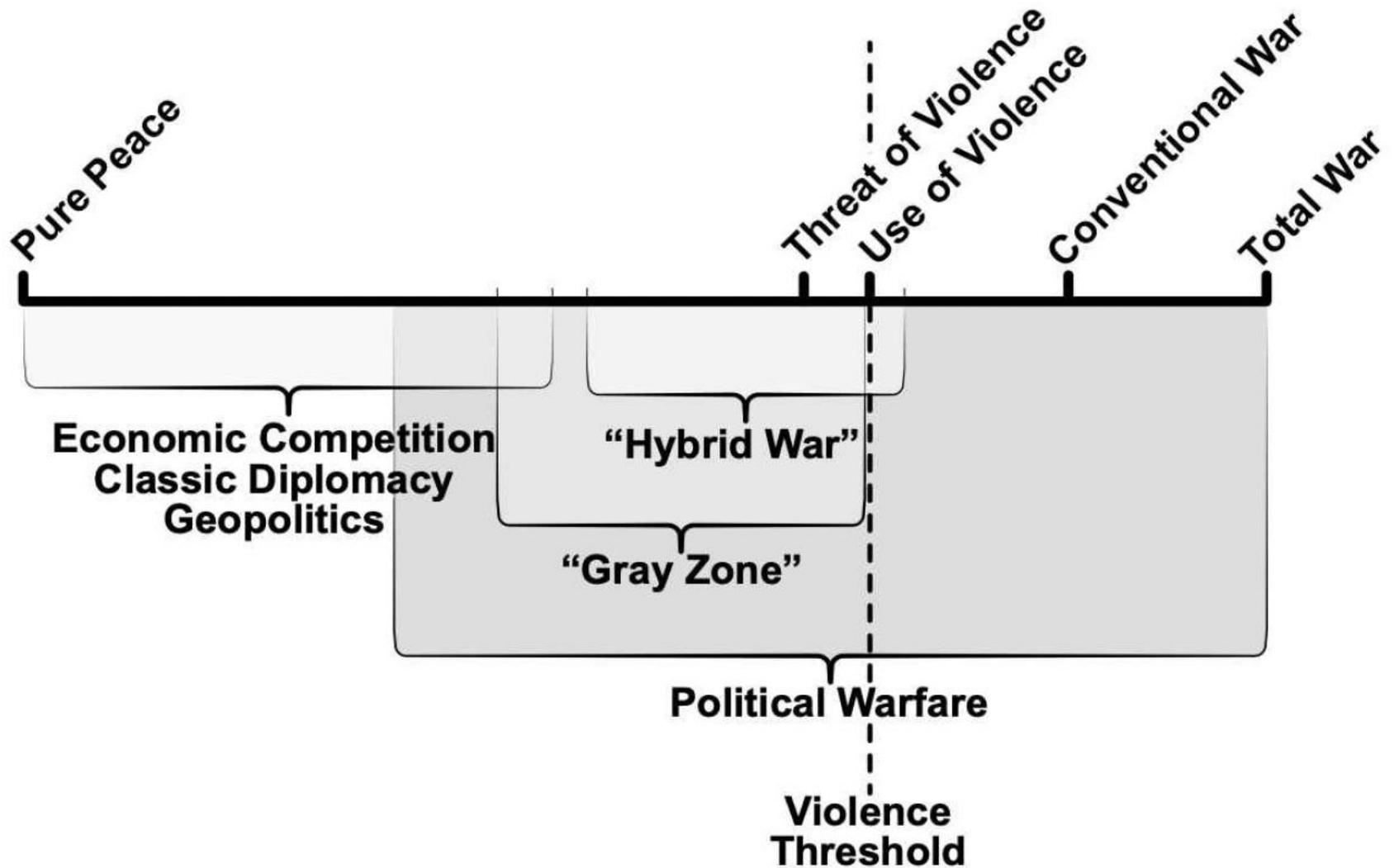


## 2. Le sfide vere stanno nelle relazioni

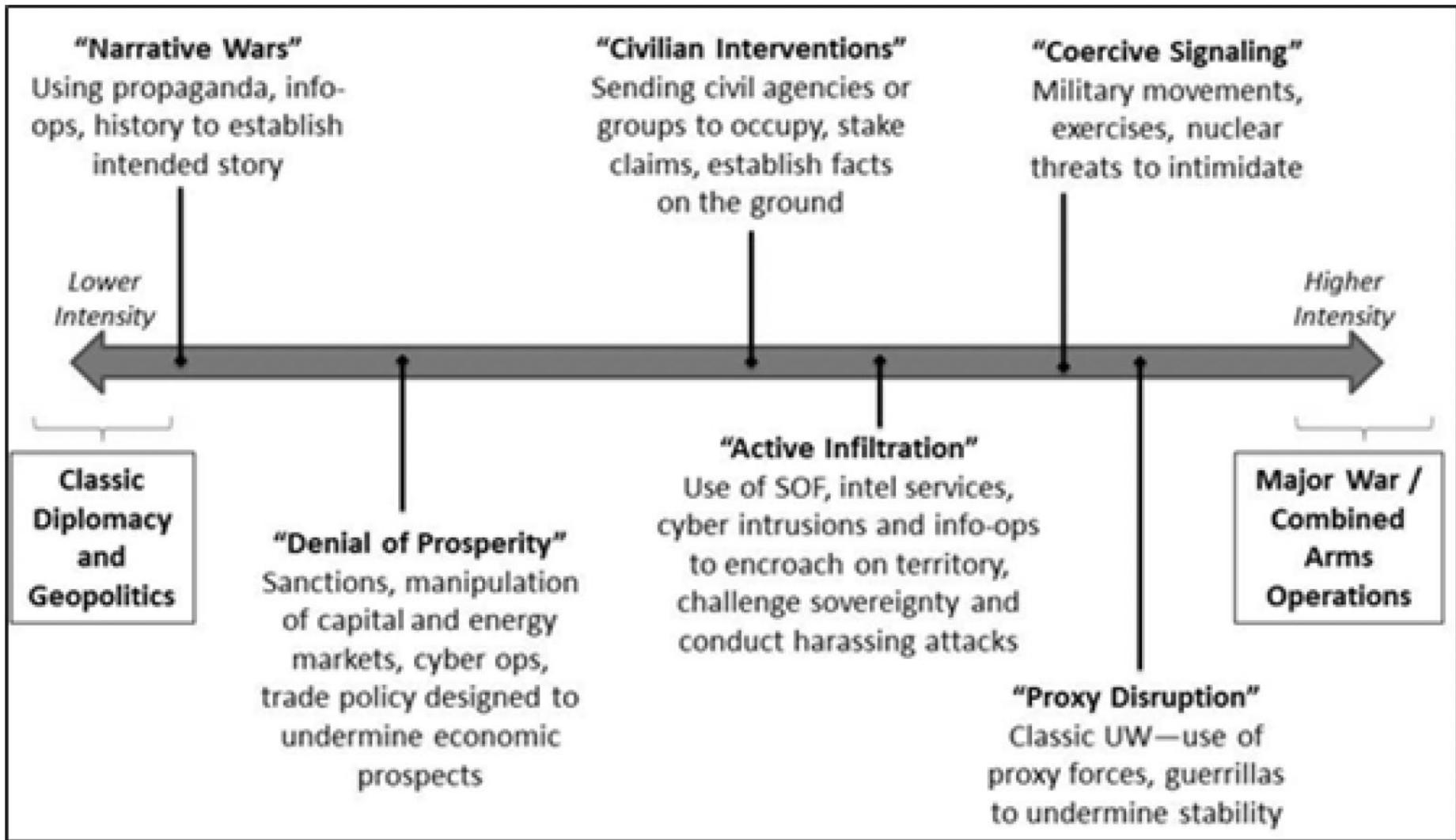
- Non le scelte dell'Amministrazione Trump ma le potenziali risposte dell'UE a Trump
- Non gli effetti della guerra commerciale USA-Cina ma dove si porrà l'UE in questo spazio di competizione
- ... e altri accordi geoeconomici che stanno riplasmando gli spazi economici dove l'UE e l'Italia hanno interessi privilegiati (finora!)

### 3. ... e nel comprendere una condizione di 'non-pace' che rimarrà con noi

- Shock sistemici che assomigliano a guerre nei loro effetti sulle industrie e infrastrutture
- Nuove forme di 'guerra' ibrida che include dazi e ma anche altre forme di interventi mirati al 'denial of prosperity'
- Dazi come 'l'arma ideale fra la diplomazia e la guerra'



**Figure 1. Linear Competition Continuum Model.**



# BETTER FIREFIGHTING: READYING EUROPE FOR AN AGE BETWEEN WAR AND PEACE

Laurence Boone, Nicu Popescu

November 2024

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## SUMMARY

- The European Union today is in a hybrid situation: its states are at peace, but war roils its neighbourhood, hybrid threats stalk its territory, and other major crises from pandemics to the effects of global heating threaten its population. These pose war-like industrial and infrastructural demands.
- Too often, conventional peacetime processes still prevail. Both the covid-19 pandemic and Russia's full-scale invasion of Ukraine saw the union improvise its way to new solutions, but often much too slowly and not on the scale needed.
- Russia's war in particular has exposed the limits of the EU's military, energy, and transport infrastructure — and of the processes needed to accelerate its adaptation. Its major states are seeking to address this, but in too-piecemeal a fashion.
- The EU therefore needs a much stronger overall architecture for dealing fast with the consequences of wars and other emergencies on the EU itself and its allies. This should have at its core a European version of the US Defence Production Act, enabling Brussels and national capitals to coordinate faster responses in moments of crisis. It should also include a wider package of administrative, legal, and financial reforms designed to strengthen and speed up the EU's capacity to act in major crises.

## Between war and peace: Europe's new hybridity

The European Union is surrounded by wars. To its east, it faces the largest full-scale conflict on European soil since 1945. To its south-east, the Levant remains on the brink of a major conflagration. To its south, wars and coups are devastating the Sahel and threatening Europe's underbelly. Meanwhile the union is itself the object of an increasingly intense series of brutal hybrid aggressions, as well as the wider shocks of an interdependent world — which in part resemble wars in the demands they place on industry and infrastructure. Yet its means of dealing with these remain alarmingly inadequate.

# Fare la guerra (economica) oggi

- Forme di coercizione differenziate nella loro applicazione e incrementali (che minano l'ordine economico e giuridico internazionale pezzo per pezzo)
- 'Employing non-traditional tools of statecraft to achieve gradual but decisive results in the no-man's land between peace and war' (Samman Chung sulla 'Grey Zone Strategy')

## La sfida è anche interna

- Come rispondere alle scelte geopolitiche USA (e non solo quelle tariffarie)?
- Geografie mentali UE (profondamente) divise – del rapporto con gli USA, ma anche più ampiamente della situazione geopolitica dell'Europa in un'era di 'non-pace'

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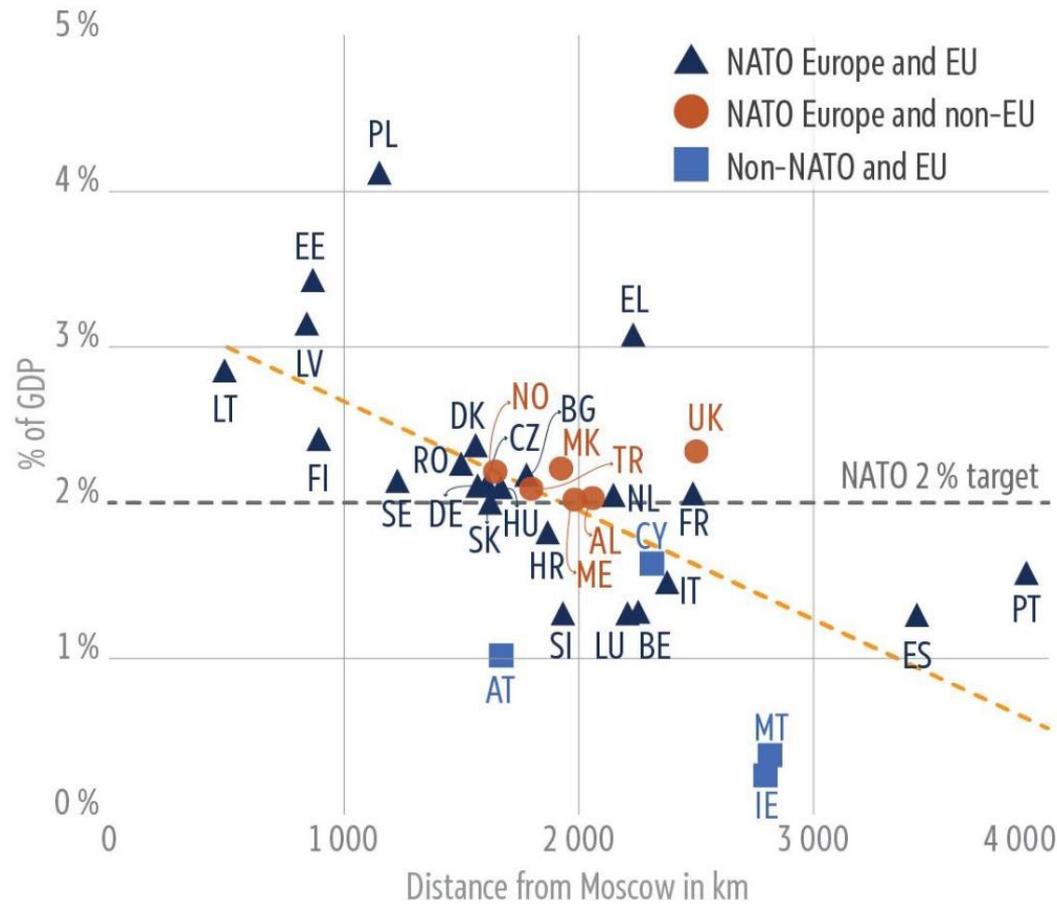
# Return of the two Europes

Donald Trump's turn to Moscow is restoring the geography of the cold war



© Harry Haysom

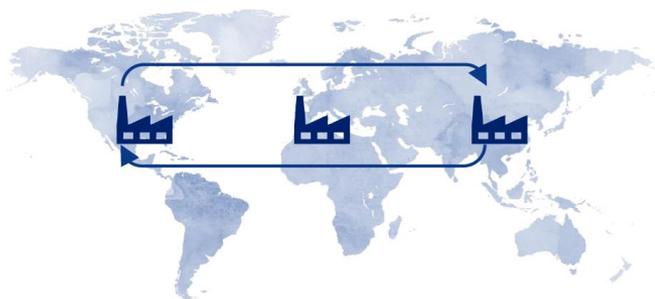
Figure 1 – Defence expenditure as % of GDP, and distance from Moscow of country's capital



# La geografia fa la differenza...

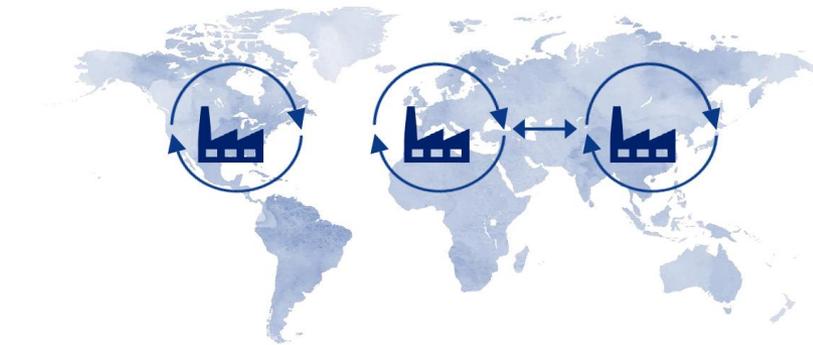
- Divergenze non solo nazionali: scelte economiche percepite come un 'rischio' al livello dello stato/UE possono essere viste come 'opportunità' al livello locale/regionale
- Come formulare una 'risposta europea' che non si basa solo sulla chiusura/ritorsione?
- Come aprirsi a 'nuove geografie'?

## Future Proof Value Chain



### **From globalized industrial value chains today....**

- Large global footprint with free-flowing movement of goods and services that serve every customer globally
- Limited local sourcing
- Plant specialization (e.g. one plant in one location, mass producing one specific product)



### **..... to regionalized, trade and natural disasters risk mitigated, decarbonized value chains in the future**

- Decentralization and localization of plants and suppliers, based on the markets and/or geo-locations
- Systematic double sourcing practices
- Flexible industrial models with ability to rebalance production operations across sites
- Competitive costs due to new manufacturing technologies
- Regionalization of production in or close to main markets
- Risk resilience from geopolitical tensions and trade disputes

*Source: Buck Consultants International, based on among others Tumo c.s., 2024*