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THE ATLANTIC DRIFT: CANADA'S QUEST FOR A NEW WEST

As the geopolitical landscape of the North Atlantic region becomes increasingly fractured, the concept of a “disappearing West” is emerging from the deepening rift between the United States and the European Union. This tension is exacerbated by the growing divide between Washington and Ottawa, as protectionist policies and conflicting security priorities undermine decades of integrated North American cooperation. In response to this isolation, Canada is repositioning itself by aggressively deepening its institutional and economic ties with Brussels in order to circumvent American volatility. This triangular realignment, characterized by waning U.S. hegemony and an emerging Canada–EU bloc, suggests that the traditional “West” is not merely dissolving, but undergoing a radical transformation. By anchoring itself in European multilateralism, Canada is attempting to forge a “New West” that can preserve liberal democratic stability independently of its southern neighbor. This strategic shift could signal a permanent departure from the post-war consensus, replacing the old Atlanticist core with a more fragmented yet resilient multipolar partnership.

METHODOLOGY

This text combines a forward-looking essay with an analysis of the North Atlantic Triangle and its recent developments. It is an attempt to make sense of a rapidly evolving phenomenon. When analyzing such a phenomenon, it is impossible to prove everything stated; the analyst's experience and carefully considered judgement become indispensable. Readers should be aware that the text's originality lies in its explanation of a potential tectonic shift in geopolitics with global repercussions.

Furthermore, the term “the West” is used in contexts where it does not have the same meaning, which could lead to confusion. Essentially, there are two Wests: the Old West, which was established after World War II and is now declining, and the New West, which has been emerging since 2025. In brief, the Old West was characterized by a hierarchy at the apex of which the United States placed itself. It had the largest economy, was an overwhelming military power, and possessed unrivalled technological superiority. On top of this, it controlled the largest military alliance the world had ever seen. In contrast, the New West seems to be more horizontal in nature, with highly integrative cooperation in every possible domain. Rather than hegemons imposing their will, it is like-minded countries, both big and small, pooling their strengths to create an ecosystem of trust and mutual respect. As the New West also purports to uphold certain fundamental principles of the Old West, it can be considered an attempt to salvage the positive aspects of the Old West while adopting a different structure and *modus vivendi*.

INTRODUCTION

The North Atlantic geopolitical landscape is currently undergoing a historic realignment as the “Old West” begins to fracture. For decades, the partnership between the United States and the European Union formed the bedrock of global liberal democratic stability. However, deepening friction over trade protectionism, differing defense priorities, and fundamental disagreements on multilateralism have undermined this traditional alliance. Meanwhile, a parallel “decoupling” is occurring within North America as the economic and political interests of the United States and Canada diverge, bringing an end to an era of seamless continental integration.

In this vacuum, a “New West” is emerging, with Canada as its pivotal architect. Rather than retreating into isolation, Ottawa is proactively repositioning itself towards Brussels, aiming to form a strategic alliance that bypasses American volatility. This process signals that the West is undergoing a radical metamorphosis, not disappearing. By anchoring itself to European institutionalism and a shared commitment to the rules-based order, Canada is attempting to preserve Western democratic resilience through a more fragmented yet adaptable multi-polar partnership. This shift could mark a definitive departure from the post-war

consensus, with the dominant U.S. presence replaced with a robust Canada–EU partnership intended to withstand the challenges of twenty-first-century geopolitics.

THE CANADA–U.S. RELATIONSHIP: COOPERATION, CONTRADICTIONS, AND RECALIBRATION

U.S. President Donald Trump’s rhetorical attack on Canadian sovereignty created a conflict that undermined North American stability and hindered U.S. efforts to compete in the rapidly emerging global order. The assertiveness of the “America First” foreign policy resulted in the Liberal Party of Canada staging a historic comeback from certain electoral defeat and produced a capable prime minister in the form of Mark Carney, whose anti-Trumpian positioning sets an example of how to deal with the American president.¹

The strain on relations is hindering the two countries’ near-total economic, military, and energy integration. Following the Second World War, this integration process was so seamless that, in military terms, the United States came close to becoming the sole defender of Canadian sovereignty during those formative years, resulting in projects such as the North American Aerospace Defense Command (NORAD). Meanwhile, Canadian industry has become deeply integrated into the American market through energy exports, pipelines, and the automotive industry.² The crowning achievement of this cooperation was the North American Free Trade Agreement (NAFTA) and its reorganized successor, the United States–Mexico–Canada Agreement (USMCA). Nonetheless, the harsh political rhetoric between the United States and Canada does not translate into a lack of military cooperation. In March, the Canadian government reached NATO’s former 2 percent defense spending target, with clear objectives to fulfill the new Hague commitments.³ NORAD continues to showcase a leading defense partnership. Furthermore, American and Canadian troops hold joint drills and receive American-linked military hardware.

While defense issues are not the main battleground, the upcoming USMCA review negotiations will be the most important point of confrontation be-

1 “Canadian Liberals Victorious,” Council on Foreign Relations, April 29, 2025, <https://www.cfr.org/articles/canadian-liberals-victorious>.

2 Mathew B. Reynolds and James K. Nelson, eds., *Canadian Imports and Trade Issues* (Nova Science Publishers Inc, 2008).

3 “Canada Joins New NATO Defence Investment Pledge,” Prime Minister of Canada, June 25, 2025, <https://www.pm.gc.ca/en/news/news-releases/2025/06/25/canada-joins-new-nato-defence-investment-pledge>.

tween Ottawa and Washington. The main goal of the American side is to reduce the trade deficit, but as with its concluded trade negotiations and tariff deals, the Trump administration will probably try to create side agreements that will force Canada to integrate more closely with the American economy and military complex and, above all, secure the majority of Canadian energy and rare earth mineral supplies. This is why, in his Davos speech and in new series of “Fireside Chat” videos, Prime Minister Mark Carney stated that he is trying to strengthen Canada’s negotiating power so that it can withstand American pressure.⁴ Canadian foreign policy is now moving towards a clear hedging strategy, seeking to establish as many bilateral and multilateral economic, military, and cultural agreements as possible in order to weather the storm coming from its southern neighbor.

Amid the turmoil in North America, Ottawa is poised to align more closely with the European Union. In nearly two years, the Trump administration has achieved the result that Canada seems to now be recalibrating its North American integration⁵ and rapidly reorient towards the still rule-based, global order-minded,⁶ but clearly militarizing⁷ European bloc.

THE U.S.–EU RELATIONSHIP: FROM PARTNERSHIP TO PHASED FRICTION

The current leadership in the United States is trying to force a drastic change in the European strategic mindset.⁸ Rather than creating transatlantic cohesion, however, the Trumpian push is creating friction between Europe and America, much like that between Canada and the United States. This can be seen across a wide range of issues. Current American policymakers view the Russo–Ukrainian conflict as an unnecessary bloodbath, whereas Europeans see it as an existential

4 Lisa Van Dusen, “Mark Carney’s Fireside Chat, or a Brief History of Forward Guidance,” *Policy Magazine*, April 19, 2026, <https://www.policymagazine.ca/mark-carneys-fireside-chat-or-a-brief-history-of-forward-guidance/>.

5 Steven Benjamin Lopez, “Carney Says Canada’s U.S. Ties Have Become ‘Weaknesses’ That Must Be Corrected,” *CBC News*, April 19, 2026, <https://www.cbc.ca/news/politics/carney-trump-trade-u-s-negotiations-weaknesses-9.7169671>.

6 Kaja Kallas, “2026 Churchill Lecture: ‘A Rules-Based Global Order in an Era of Power Politics,’” European External Action Service, March 5, 2026, <https://www.eeas.europa.eu/eeas/2026-churchill-lecture-%E2%80%98-rules-based-global-order-era-power-politics%E2%80%99-en>.

7 “Prime Minister Carney Secures Canada’s Participation in the European Union’s SAFE Initiative,” Prime Minister of Canada, December 1, 2025, <https://www.pm.gc.ca/en/news/news-releases/2025/12/01/prime-minister-carney-secures-canadas-participation-european-unions>.

8 Dániel Lévai, “A hatalmi erőegyensúly új korszaka – Az amerikai külpolitika újjászervezése Trump elnökségének első évében” [A New Era in the Balance of Power – The Recalibration of U.S. Foreign Policy During the First Year of the Trump Presidency], Hungarian Institute of International Affairs, January 26, 2026, <https://hii.a.hu/wp-content/uploads/2026/01/Levai-Az-amerikai-kulpolitika-ujjaszervezese-a-Trump-első-éve-1.pdf>.

threat to their way of life. The United States now views multilateralism as an obstacle to maximizing its power, whereas the EU is committed to upholding the post-Cold War status quo. The United States views European bureaucrats and managerial elites as inefficient economic managers and censors and is critical of the EU's Digital Service Act, which it sees as targeting American companies and threatening citizens' freedom of speech.⁹ Culturally, the leading figures of the Trump administration also criticize European civilization for backsliding due to the mishandling of illegal immigration, particularly since 2015, while the EU firmly supports the human and civil rights aspect of the issue. In this transatlantic drift, the question is not whether there is a conflict between the two sides of the Atlantic Ocean, but how to manage the growing differences between them. In speeches, declarations, and documents, the Trump administration's views on global affairs and foreign policy are the opposite of those of Europe. This gap is widening by the day. The current U.S. administration and European countries lack a common strategic outlook, they do not share the same values, and their economic policies are increasingly divergent. The war in Iran is another prime example of this great divergence.

In Brussels, however, the growing tension with the United States is viewed less as a series of isolated trade disputes and more as an underlying breakdown in the "Atlanticist" partnership. European leaders are increasingly viewing Washington as an unreliable partner, prone to unilateralism regardless of which party occupies the White House. This sentiment is rooted in what they see as a "triple threat" to EU stability: economic protectionism, the abandonment of security commitments, and the weaponization of the dollar. The main economic flashpoint is the 2022 Inflation Reduction Act (IRA). The EU views the IRA's "Buy American" subsidies as an aggressive industrial policy intended to undercut the European manufacturing sector under the guise of a green transition.¹⁰ This has forced Brussels to shift from its traditional role as a guardian of free trade towards a "strategic autonomy" model—essentially a defensive move to develop independent industrial and military capabilities.

9 Humeysa Pamuk, "Exclusive: Rubio Orders US Diplomats to Launch Lobbying Blitz against Europe's Tech Law," *Reuters*, August 7, 2025, <https://www.reuters.com/sustainability/society-equity/rubio-orders-us-diplomats-launch-lobbying-blitz-against-europes-tech-law-2025-08-07/>.

10 Nicholas Crawford, "Europe's Measured Response to the US Inflation Reduction Act," International Institute for Strategic Studies, April 21, 2023, <https://www.iiiss.org/online-analysis/survival-online/2023/04/europes-measured-response-to-the-us-inflation-reduction-act/>.

Furthermore, it is becoming increasingly clear that American and European interests in the Asia-Pacific region do not align perfectly. While Washington is pushing for an aggressive “decoupling” from China, the EU—led by export powerhouses such as Germany—views such a move as economic suicide. This divergence has led to a sense of exhaustion in Brussels; the EU no longer believes that it can outsource its security to a superpower that considers European prosperity to be of secondary importance. Consequently, the EU is looking increasingly northwards and inwards for more stable and predictable partners, such as Canada, to help preserve the liberal democratic order in an era where the American “security umbrella” increasingly feels like a “security lever.”

THE CANADA–EU RELATIONSHIP: GIVING A NEW CONTEXT TO CANADIAN SOVEREIGNTY

This is a new departure for Canada. The recent realignment initiative with Europe represents a systemic shift towards greater autonomy that could establish Canada as a global player. For this reason, Canada’s strategy is multifaceted, multifunctional, and all-encompassing. First, the foundational pillars are rooted in an unwavering commitment to the principles and traditions of liberal democracy. While Canada has shown considerable flexibility in dealing with partners of all ideological colors, it now wishes to integrate only with countries that share its own ideological ecosystem. Once this is secured, Canada intends to base its cooperation on four key pillars, particularly with Europe: defense, resources, legislation, and geopolitics.

It is important to note that liberal democracy is not only a shared value under the “Carney Doctrine,”¹¹ but also a strategic asset that sets the Canada–EU bloc apart from less democratic alternatives. This suggests that the democratic model is considered more resilient than other systems of governance. These countries are essentially forming an exclusive economic and security club that intentionally excludes non-democratic or unstable actors. Canada is well aware that many European countries have considerably dysfunctional democratic systems. To mitigate this risk, the Canadian Prime Minister seems to have anchored his European ambitions in the Nordic countries, a region where adherence to liberal democracy is rarely questioned. Carney clearly views the Nordic liberal core

11 Ross Douthat, “The Binary Logic of the Carney Doctrine,” American Enterprise Institute, January 24, 2026, <https://www.aei.org/op-eds/the-binary-logic-of-the-carney-doctrine/>.

as a means of strengthening Europe’s and the EU’s commitment to democracy in all its forms and applications. Democracy is not only a platform for interaction; it is also a strategic asset in the Nordics. Canada is looking to secure the Arctic–Atlantic corridor by establishing a “Northern Democratic Front” through cooperation with the Nordic Council and High North mutual defense cooperation with Norway, thereby bypassing the U.S.–led NORAD. Furthermore, the Stockholm protocol on financial stability can coordinate monetary frameworks between Canada and the Nordic countries, insulating their economies from volatility. In short, a Nordic pivot could help ensure that the New West is not merely a reactive trade agreement with Brussels, but a robust bloc capable of maintaining Western democratic values independently of Washington’s influence.

This could mark a rupture in the post-war Atlantic order, reflecting Canada’s transition from being a North American satellite to becoming a key player in the New West. This transformation is underpinned by several strategic pillars and is spearheaded by the 2026 Security Action for Europe (SAFE) agreement.¹² By securing quasi-member status within the EU’s military–industrial complex, Canada is effectively hedging against the loss of the American security umbrella by integrating directly into Europe’s future defense architecture. Alongside this security shift, the Strategic Raw Materials Partnership has enabled Canada to bypass traditional North–South supply chains and establish a direct Atlantic raw materials corridor.¹³ By prioritizing the export of lithium, cobalt, and nickel to European markets over U.S. demand, Canada has positioned itself as an indispensable “resource bank” for the EU’s green industrial transition.

Beyond defense and mineral resources, the partnership is being reinforced by a comprehensive regulatory “lock-in.” This involves formally synchronizing Canadian AI governance, data privacy, and carbon pricing frameworks with EU-wide standards, such as the EU AI Act and the Carbon Border Adjustment Mechanism. In doing so, Canada is building a transatlantic regulatory fortress, as part of a triple convergence of values, interests and trust.¹⁴ This legal alignment integrates the Canadian economy with Europe, effectively insulating its industry

12 “Agreement between the European Union and Canada Concerning Participation under the SAFE Instrument,” Government of Canada, February 24, 2026, <https://www.international.gc.ca/world-monde/international-relations-relations-internationales/eu-ue/agreement-accord.aspx?lang=eng>.

13 “EIB and Canada Team Up to Strengthen Critical Raw Material Resilience,” European Investment Bank, March 2, 2026, <https://www.eib.org/en/press/all/2026-077-eib-and-canada-team-up-to-strengthen-critical-raw-material-resilience>.

14 Steven Chase, “As the U.S. Turns on Its Allies, Canadians Look toward Joining Europe,” *The Globe and Mail*, April 20, 2026, <https://www.theglobeandmail.com/politics/article-canada-european-union-eu-carney/>.

from North American tariff and foreign policy volatility. It also provides a stable ecosystem in which Canadian exports remain tariff-free in Europe. Driven by the swiftly improvised Carney Doctrine, this triangular shift could demonstrate that Western democratic stability does not require a dominant American presence or commitment to project strength. Rather, it could thrive through resilient, multi-polar partnerships that transform the North Atlantic into a well-coordinated,¹⁵ unified zone of shared security, values, and economic survival. From a tactical point of view, Canada has transformed what seemed like an impossible situation into one of visible strength, promising a resilient geopolitical framework for the future.

However, while the partnership between the EU and Canada is characterized by high normative alignment, it is limited by structural realities. Economically, regulatory friction in agriculture and Canada's modest market size (roughly 10 percent of U.S. GDP) prevent it from becoming a primary market hub.¹⁶ In terms of security, Canada's reliance on U.S. frameworks such as NORAD and International Traffic in Arms Regulations (ITAR) limits its ability to offer the strategic autonomy or hard-power guarantees required by U.S. allies in Central Europe as an alternative to the U.S. security umbrella. While Germany and its EU partners increasingly view Canada as a reliable partner during periods of U.S. volatility, Canada is more of a strategic option than a real replacement. It lacks the military strength to protect Europe and the economic clout to break free from the American sphere of influence.¹⁷ Therefore, one could argue that Canada is a valuable, reliable partner that reduces Europe's dependence on the United States without fundamentally changing transatlantic security cooperation structures. The EU is not yet a seamlessly integrated market or a politically unified system like the United States, so it cannot provide Canada with a similar level of systemic reliability.¹⁸

15 Christopher Sands, "Canada's Alternative to Trump's Doctrine for the Americas," *Americas Quarterly*, February 17, 2026, <https://www.americasquarterly.org/article/canadas-alternative-to-trumps-doctrine-for-the-americas/>.

16 European Commission, "Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on the Implementation of EU Trade Agreements 1 January 2019 - 31 December 2019," EUR-Lex, November 11, 2020, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex:52020DC0705>.

17 Christopher Sands, "Is Canada on a Forked Road Away from North America?," Brookings, March 4, 2026, <https://www.brookings.edu/articles/is-canada-on-a-forked-road-away-from-north-america/>.

18 Wim van Meurs et al., *The Unfinished History of European Integration* (Amsterdam University Press, 2024).

CONCLUSION

The deepening rift between the United States and its traditional allies has catalyzed a radical overhaul of the North Atlantic order. In the face of American protectionism and volatility, Canada has abandoned its role as a North American satellite to become a key player in creating a “New West.” By spearheading the Carney Doctrine, Ottawa is actively pivoting towards Brussels and the Nordic core to preserve liberal democratic stability independently of Washington. This strategic realignment is being cemented through institutional “lock-in,” including the 2026 SAFE agreement for military integration and the Stockholm protocol for financial stability. By becoming a key supplier of critical minerals to European markets and synchronizing regulatory frameworks, Canada is effectively insulating itself from continental turbulence. If this shift endures, it will signal a permanent departure from the post-war consensus, replacing U.S. hegemony with a resilient, multifaceted Canada–EU partnership designed for twenty-first-century survival. However, all this hinges on Canada developing market and industrial capacities, and on Europe becoming and remaining a stable partner—a prospect that is still uncertain for now.



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