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Everything that Trump does on an international level unpredictably moves within a triangle of narcissism, cynicism, and incompetence that could at any moment transform into the Bermuda Triangle. Or, with the strength of the United States behind him, it might actually produce a result. How long-lasting it will be, no one can predict, but Trump is interested in being able to proclaim a result, not in ensuring it is lasting. The sequence of recent meetings, first between Trump and Putin in Alaska, then with Zelensky and the "willing" Europeans in Washington, provides us with two clues. The first is that Trump, by framing the negotiations in a favorable direction to Putin's demands on certain key points, has effectively restricted Zelensky and the Europeans' room for maneuver. This, perhaps rather hastily, led many observers, and obviously the Russian media, to proclaim Putin's victory. The second, however, is that it is objectively difficult for Trump to ignore the position of the Europeans, and especially of Zelensky. Under these conditions, today it would be foolhardy to make predictions about the final outcome. At the present moment, the prospects of negotiations leading to an end to hostilities seem rather remote.

Before returning to the most likely scenario—that of the continuation of hostilities—it is worth examining the other scenario, namely the conditions and consequences of an agreement. This is also because what the Europeans may define as the consequences of a potential agreement will also influence the continuation of the war. It is therefore interesting to examine the prospect of an agreement in light of what appear to be the "red lines" of the Europeans, and of course of Zelensky. However, keeping in mind that, even if we speak of "peace" and no longer of a truce or ceasefire, nothing that is eventually concluded will be permanent. This is why some have cited the "Korean model". This model, however, has obvious limitations that it would be dangerous to underestimate. For Putin, in fact, the *Russkiy Mir* is not a political choice, but an essential characteristic of Russia as he conceives it, much as the *Sonderweg* was for German nationalism in its time. It's not difficult to understand that for Putin, Ukraine is not a territorial issue, but an existential one. From his perspective, a "piece of Russia" deciding to become a liberal democracy integrated into Europe is in no way tolerable. This factor makes the Ukrainian situation quite different not only from the "Korean model" but also from the "Finnish" one, which is cited by some as a possible solution.

The Red Lines

The first concerns the territorial concessions Ukraine would be forced to make to stop the hostilities. This is the most difficult decision for Zelensky, especially if Trump were to push for complying with Putin's request to control the entire Donbass, including areas not yet occupied by his soldiers. It is impossible for an outside observer to imagine how far Ukraine's concessions might go. The second concerns what Putin calls "the underlying causes of the crisis." In other words, Russia's desire to neutralize any desire Ukraine might have to evolve into a sovereign state. This affects a range of issues,

including the size of the Ukrainian armed forces, Ukraine's freedom to pursue an independent foreign policy and thus, for example, to join the EU, and even the very functioning of the country's institutions. These demands stem from the profound conviction that Ukraine is actually an artificial state, a "non-nation" destined to return to the fold of the *Russkiy Mir*. Clearly, there is no scope for concessions on this point.

The third concerns the future of sanctions. US economic relations with Russia are very modest and Trump could be attracted by the prospect of increasing them, hoping to alienate Russia from China, or perhaps for personal reasons. The Europeans, on the other hand, have an interest in maintaining maximum economic pressure on Russia. The progressive weakening of the Russian economy is, in fact, one of our most important deterrents for the future. The effect of the sanctions adopted has already significantly weakened economic relations. Interest in resuming them is very modest. There is, of course, the issue of gas and oil. Here too, the decoupling of our economy from Russian hydrocarbons is well advanced, and its costs have been largely absorbed. There is no reason to reverse course. Some countries, such as Hungary and Slovakia, might be tempted to break ranks, but it is important that these remain isolated cases. With the possible exception of the financial sector, there should be no objective impediments to Europe maintaining pressure even in the face of a US change of course.

The Guarantees

It should be clear to everyone by now that the key to the future lies in the Western guarantees that, in the event of a cessation of hostilities, Ukraine would receive against the probable, if not certain, prospect of renewed Russian aggression. First of all, this is a completely different matter from that of a potential UN-backed interposition force charged with monitoring the long border between Russia and Ukraine that will emerge from the negotiations; a force that, for obvious reasons, should only be made up of "neutral" countries. This is not the place to evaluate its usefulness or effectiveness, but it is clear that under no circumstances could it serve the purpose of "guaranteeing" Ukraine against renewed aggression. Since Ukraine's formal accession to NATO is, at least for now, ruled out, what are we talking about? A guarantee given to Ukraine by a number of European countries with the support of the United States. The famous Article 5 of the Atlantic Treaty would have the characteristic of considering aggression against any member of the club by a third country as an aggression against all. Interestingly, while the text of the article in question does not imply any automaticity, its effectiveness as a deterrent instrument during the Cold War years was based precisely on the widespread belief, among allies and adversaries alike, that the reaction to aggression would be automatic. The other source of credibility for Article 5 derived from the existence of a visible military presence equipped with the necessary capabilities to resist aggression; a presence that, ultimately, included nuclear deterrence. The current situation therefore presents two substantial differences that affect the credibility of this "NATO-like" guarantee discussed in connection with Ukraine. The first is that under Trump, the credibility of the American guarantee, if it has not disappeared, has at least weakened considerably. The second is that this time, the primary role in ensuring deterrence would fall on the Europeans.

From what emerges, we are essentially talking about four constituent elements of this guarantee. The first is a substantial strengthening of Ukraine's self-defense capacity. In the words of Ursula von der Leyen, it involves transforming it into a "porcupine with steel spines." The second would be a European task. It essentially involves significantly accelerating the qualitative leap in the development of Europe's military capabilities, which was theoretically agreed upon at the last NATO summit. And not just

material capabilities, but also operational models: everything necessary to lend credibility to conventional deterrence. This mechanism should also include the prospect of deploying European military forces on Ukrainian soil, which would serve the same tripwire function as American forces stationed in Europe within NATO. This is the aspect that, understandably, attracts the most public attention. From ongoing work, it emerges that among the so-called "willing" countries we observe the presence of three types of countries: those that are a priori willing to take this step - France, Great Britain, some Nordic and Baltic states; those that are hesitant, without actually saying no, but waiting to see the context that will emerge from a potential agreement, with the most significant case being Germany; and finally, those that are clearly reticent, such as Italy and Poland. It cannot be denied that these differences of opinion seriously undermine the credibility of the entire project. On the other hand, these divergences must be put into perspective. The reticence is clearly partly due to domestic political considerations with very different motivations. In Italy, there is widespread pacifism and significant pro-Russian currents that create difficulties for the majority and effectively paralyze the opposition. In Poland and perhaps Germany, these are historical reminiscences that are difficult to erase; it is as if Italy were asked to send troops to Libya. Everyone is uncertain about the nature of the American commitment. In the end, however, it will not be necessary for everyone to do the same thing. For example, Italy already deploys troops within NATO in Romania, Finland, and the Baltic states. Even if it maintained its refusal to deploy troops in Ukraine, it would be difficult to imagine that those already deployed on the country's border would not be part of the collective guarantee. What will determine the credibility of the European commitment will be, above all, the size of the available resources, the operational arrangements, and the consistency of the commitments made by each participant.

The third level of the guarantee, perhaps the most delicate and uncertain and which, as we have seen, conditions the previous one, is the nature of American support, necessitated by the persistent structural weaknesses of the Europeans. This concerns primarily sectors critical to modern warfare, such as missiles, intelligence, air cover, satellites, and more. Finally, the fourth level consists of nuclear deterrence, which must still be based on the US, but which is also beginning to have a possible European dimension, at least a Franco-British one.

The European Challenge

The process initiated with the meetings in Alaska and Washington can conclude in many ways. The attempt to find a negotiated solution could fail, leading to an indefinite continuation of hostilities. Or Europe and Ukraine could be faced with peace terms imposed by Trump that Europe finds unacceptable. Reflecting on this second scenario is beyond the scope of this paper. The other two are indeed connected. After Alaska and Washington, the prospects for negotiations have receded, primarily because Putin seems convinced that time is on his side and that the initiatives of the "willing" will lead nowhere. It can therefore be concluded that the more credible the European initiative, the greater the pressure on Putin to engage in negotiations, but the incentive for Trump to withdraw will also diminish.

One could also say that the challenge for Europeans is to give concrete meaning to the notion of "strategic autonomy". This term, however, is somewhat ambiguous, and two different narratives are circulating. Both are grounded in the recognition that Trump's actions have already significantly damaged the trust that existed between transatlantic allies; damage that will not be easy to repair, regardless of the currently unpredictable evolution of the American situation. The first narrative echoes old Gaullist impulses or remnants of anti-Americanism that have always been present in sectors of the

European left, and which are comforted by the shift Trump has brought to America. For these people, autonomy "from America" is an end in itself, regardless of the costs it entails. A modicum of realism is enough to understand that it would lead us to a dead end, for the simple reason that, with all its best efforts, Europe is currently unable to provide, on its own and in the timeframe it requires, the deterrence that Ukraine and Europe itself need in the face of the Russian threat. The second version of strategic autonomy, on the other hand, consists of a process of gradually building the capacity to act autonomously, while seeking, as far as possible, to maintain Western unity and America's willingness to participate in the collective effort. Of the two narratives, only the second is realistic. It accepts that the concept of the West as we have known it for the last century is in crisis, but refuses to evaluate it solely in terms of dependence. It is also based on the observation that, whatever our problems with Trump, Europe's enemy is Putin. It is, moreover, embraced by all the governments involved in the operation. The other narrative, however, is very present in the media in some countries; which is why it is important to clarify.

Responding to the challenge in practice implies one thing above all. We cannot predict today whether and under what terms we will agree on a NATO-like guarantee for Ukraine. However, even if it were drafted in very ambitious terms, its value would only be determined by the concrete mechanism we are able to build. There's little point in arguing over where to deploy four or five ready-to-use or easily mobilized brigades, if analyses suggest the brigades needed would be ten times greater. This implies simultaneously maintaining the unity of the diplomatic approach demonstrated in Washington and building credibility regarding the Europeans' responsibility for military deterrence. The complication is that the acceleration of events places a new element of urgency into the process. Furthermore, we must ensure that the weakening prospects for serious negotiations we are witnessing do not become a pretext not only for slowing down the efforts of the "willing" to establish guarantees for Ukraine, but also, and above all, for undermining what is most urgent: providing material support to Ukraine.

We are all aware that there is, first and foremost, a problem of mobilizing a public opinion still steeped in pacifism in some countries, distracted by other priorities, and in some cases deeply skeptical of Europe's ability to rise to the occasion. It is therefore essential for European governments and institutions to seriously engage in a pedagogical effort. It will also be necessary to find a way to exploit the full potential of the EU and its institutions, without being slowed down by procedural formality and, above all, by the requirement for unanimity. This is the whole point of "volunteers" who operate on the margins of, but not independently of, European institutions. Finally, it will be necessary to find a way to reconcile two equally important needs. On the one hand, respecting the complexity of Ukraine's EU accession process, a necessarily long-term prospect that must avoid shortcuts that would lead us, as in other cases in the past, to pay a high price for hasty compromises. On the other, there is the need to concretely advance Ukraine's gradual integration into the European system. Here too, a certain amount of legal and institutional imagination will be required. The reconstruction programmes currently under discussion and the envisaged involvement of Ukrainian industry in the development of European military capabilities could already provide two very useful foundations.

The "Munich" Scenario

The options we are discussing imply the acceptance of a final compromise that is somewhat acceptable to Europeans and to Zelensky, taking into account the "red lines" outlined above. However, the very notion of "peace" contains a threat that could undermine Europe's credibility. It is foreseeable that, faced

with a cessation of hostilities, significant segments of European public opinion could be led to decide that the worst is over, that Ukraine is safe, and, above all, that the formal guarantees established to safeguard its sovereignty are sufficient. In essence, they suggest that Putin's word can be trusted and that perhaps we can save on the huge military expenditures to which we have committed. Added to this would be the interest in resuming normal economic and trade relations with Russia. The danger is real and could affect the significant segments that already express sympathy for Russia. Such a temptation would also be strengthened if visible signs of economic cooperation between America and Russia were to emerge, promoted by Trump. This would support the opinion of those who already maintain that the peace process underway is "Trump's peace on Trump's terms" and that Europeans should stay away. Paradoxically, since it is unlikely we could afford to confront Russia alone in this case, the conclusion would be that Europe too must develop its own strategy to build the "common European home". This would be a highly heterogeneous coalition, but one sufficient to compromise the response to the challenge. The effects would likely be uneven across member countries, with some, such as Italy and Spain, being more vulnerable than others. However, if a certain number of key countries were contaminated, the effects on the credibility of the entire European effort would be devastating.

It is easy to foresee that the effect of such a development would be twofold. On the one hand, it would also undermine the credibility of any commitment to defend Ukraine that Trump might make. On the other hand, it would convince Putin of what he has always believed: that Europeans are structurally divided, decadent, and cowardly. The next aggression, in Ukraine or elsewhere, would therefore be only a matter of time. If Europe were to prove incapable of responding to the challenge by building a credible deterrent along the lines already indicated, a new conflict would become inevitable. This would likely lead to a new awakening, which, like that of the democracies after Munich, would undoubtedly be very painful. But that, as they say, is another story.