



Research Center
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Europe's test of maturity

Riccardo Perissich

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Everything Trump does on the international stage moves unpredictably within a triangle of narcissism, cynicism, and incompetence that can at any moment turn into a Bermuda Triangle. Or, backed by the strength of the United States, it can produce a result. How lasting that result may be, no one can predict—but what matters to Trump is being able to proclaim an outcome, not that it endures.

The sequence of meetings in recent days—first between Trump and Putin in Alaska, then with Zelensky and the “willing” Europeans in Washington—leaves us with two indications. One is that by shaping the negotiations in ways favourable to Putin's demands on key issues, Trump has in effect narrowed the room for manoeuvre of both Zelensky and the Europeans. This has led many observers, perhaps somewhat hastily, and of course the Russian media, to declare Putin the victor. It is however objectively difficult for Trump to ignore the position of the Europeans, and especially Zelensky's. Under these conditions, it would be reckless today to predict the outcome. Yet certain parameters are now sufficiently clear to contribute, with all due caution, to the formulation of a reference scenario. What remains to be seen is to what extent such a scenario would be acceptable for Europe. It is therefore interesting to examine it considering what appear to be the “red lines” of the Europeans and, of course, Zelensky. One must keep in mind, however, that even if the talk is of “peace,” not merely of truce or ceasefire, nothing eventually agreed upon will have a permanent character. This is why some have invoked, perhaps improperly, the “Korean model.”

The Red Lines

The first concerns territorial concessions that Ukraine would be forced to make to halt hostilities. This is the most difficult decision for Zelensky—especially if, as seems likely, Trump pushes him to accept Putin's demand to control the entire Donbas, including areas not yet occupied by Russian troops. For an outside observer, it is impossible to imagine how far Ukraine might go with concessions.

The second concerns what Putin calls “the deep causes of the crisis”—namely, Russia's determination to neutralise any ambition for Ukraine to evolve as a sovereign state. This touches on a range of issues, from the size of Ukraine's armed forces to its freedom to conduct an independent foreign policy (including joining the EU), to the very functioning of its institutions. These demands stem from the deep conviction that Ukraine is in fact an artificial state destined to return to the fold of the *Russkiy Mir*. On this point, there is no room for concessions.

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The third concerns the future of sanctions. U.S. economic ties with Russia are modest, and Trump might be tempted by the prospect of expanding them—in the hope of drawing Russia away from China - or perhaps also for personal reasons. Europeans, however, have an interest in maintaining maximum economic pressure on Russia. The progressive weakening of Russia's economy is one of our most important deterrent tools for the future. Sanctions already adopted have significantly reduced economic ties, and the incentive to resume them is not big. Of course, there is the issue of gas and oil. Yet here too, Europe's decoupling from Russian hydrocarbons is well advanced, and the costs have largely been absorbed. There is no reason to reverse course. Some countries—Hungary and Slovakia, for instance—might be tempted to break ranks, but it is important that they remain isolated cases. Apart from the financial sector, there should be no objective obstacle for Europe to maintain pressure even if the U.S. changes course.

The fourth issue is the most important: Western guarantees that Ukraine would need considering the likely, if not certain, prospect of renewed Russian aggression. This is entirely different from the idea of a UN peacekeeping force tasked with monitoring the long Russia-Ukraine border that would result from negotiations; such a force, for obvious reasons, would have to be composed of "neutral" countries. Whether such a mission would be useful or effective is not the point here, but in no case could it serve to "guarantee" Ukraine against renewed aggression. Since, at least for now, formal NATO membership for Ukraine is ruled out, what are we really talking about? A guarantee given to Ukraine by several European countries with U.S. backing. Like NATO's famous Article 5, it would treat an attack on any member as an attack on all.

Interestingly, the article's text contains no automatic mechanism, but its effectiveness as a Cold War deterrent rested precisely on the widespread conviction—among allies and adversaries alike—that the response would be automatic. Another source of credibility came from the visible existence of a military apparatus capable of resisting aggression, including, ultimately, nuclear deterrence.

The current situation entails two substantial differences that affect the credibility of this "NATO-like" guarantee being discussed for Ukraine. First, with Trump, the credibility of the American guarantee has, if not vanished, been seriously weakened. Second, this time the primary responsibility for ensuring deterrence would fall on the Europeans. In essence, four elements are at stake. First, a substantial strengthening of Ukraine's own self-defence capacity—in Ursula von der Leyen's words, transforming it into a "porcupine with steel quills." Second, the most important: it would fall to Europeans to accelerate the qualitative leap in Europe's military capacity that was theoretically agreed at the last NATO summit. Not just material capabilities, but also operational models—everything necessary to lend credibility to conventional deterrence. This would include the possibility of deploying European troops on Ukrainian territory, serving the same *tripwire* function as U.S. forces stationed in Europe under NATO.

Third, and perhaps most delicate, is U.S. support—still necessary given Europeans' structural weaknesses—especially in critical sectors of modern warfare such as missiles, intelligence, air cover, satellites, and more. Finally, the fourth element is nuclear deterrence, which must still reference the U.S. but could increasingly acquire a European, at least Franco-British, dimension.

The European Challenge

The process opened with the meetings in Alaska and Washington could end in many ways. The attempt at a negotiated solution could fail, leading to a continuation of hostilities indefinitely. Or Europe and Ukraine could be faced with peace terms imposed by Trump that would be unacceptable to us. Considering such scenarios goes beyond the scope of this text. The scenario under discussion, however, is plausible enough to warrant examining its implications.

For Europeans, the challenge could be described as giving real substance to the notion of “strategic autonomy.” This is, however, an ambiguous term, around which two different narratives circulate. Both start from the recognition that Trump’s actions have already inflicted lasting damage on transatlantic trust, a damage that will not be easily repaired—whatever unpredictable turn American politics may take. The first narrative echoes old Gaullist impulses or residues of anti-Americanism still alive in parts of Europe’s left, now encouraged by Trump’s shift in America. For them, Europe’s primary aim must be autonomy “from America.” Yet the slightest realism reveals this would lead us into a dead end, since Europe simply cannot, on its own and within the needed timeframe, provide the deterrence that Ukraine and Europe itself require in the face of the Russian threat.

The second version of strategic autonomy envisions a gradual building of the capacity to act independently, while seeking as much as possible to preserve Western unity and American participation in the collective effort. Of the two, only the second is realistic. It accepts that the concept of “the West” as we have known it for the past century is in crisis but refuses to see it only in terms of dependency. It also recognizes that, whatever our problems with Trump, Europe’s enemy is Putin. This view is, in fact, shared by all governments engaged in the effort. Yet the other narrative is strongly present in some countries’ media—hence the need for clarity.

We cannot today foresee if, and on what terms, a NATO-like guarantee for Ukraine will be agreed. However, even if drafted in ambitious terms, its value would rest solely on the concrete apparatus we are able to build to back it. This implies both preserving the diplomatic unity shown in Washington and building the credibility of the European component in the military deterrence framework. The acceleration of events adds urgency to the process.

We are all aware that the first problem is mobilizing public opinion, which in some countries is still steeped in pacifism, distracted by other priorities, and in some cases deeply sceptical of Europe’s ability to rise to the occasion. European governments and institutions must therefore mount a serious educational effort. They must also find ways to exploit the EU’s full potential without being slowed by procedural formalism and, above all, by the need for unanimity. This is the rationale behind the formation of “coalitions of the willing” acting on the margins but not independently of EU institutions. Finally, two important needs must be reconciled. On one hand, we must respect the complex process of Ukraine’s EU accession—a necessarily lengthy prospect that must avoid shortcuts leading, as in past cases, to heavy costs from hasty compromises. On the other hand, it is necessary to mark Ukraine’s gradual integration into the European system with concrete steps. Here too, a measure of legal and institutional imagination will be needed. Reconstruction programmes now under discussion and the planned association of Ukrainian industry with the development of European military capacities could already provide two very useful foundations.

The “Munich” Scenario

The hypothesis we are considering involves a final compromise somehow acceptable to Europeans and Zelensky, considering the “red lines” outlined earlier. Yet in the very notion of “peace” lies a danger that could undermine Europe’s credibility. Once hostilities cease, significant parts of European public opinion may conclude that the worst is over, Ukraine is safe, and—above all—that the formal guarantees established to safeguard its sovereignty are sufficient. In short, that Putin’s word can be trusted and that perhaps we can economize on the massive military spending to which we have committed.

Added to this would be interest in resuming normal economic and commercial relations with Russia. The danger is real, potentially involving not just marginal groups but also those sympathetic to Russia and the traditional pacifism embedded in European society. This trend would be reinforced by visible elements of U.S.–Russia economic cooperation promoted by Trump’s America. It would strengthen the view of those who already claim that the peace process underway is “Trump’s peace, on Trump’s terms,” and that Europeans must distance themselves by reclaiming their independence.

Paradoxically, since it is not credible that such independence could allow us to confront Russia alone, the conclusion would be that Europe must develop its own strategy for building a “common European home”. Such a coalition would be highly heterogeneous, yet sufficient to undermine the collective response to the challenge. Effects would likely differ across member states: some, like Italy and Spain, are more vulnerable than others. But if enough key countries were swayed, the credibility of Europe’s entire effort would be devastated.

The consequences of such an evolution would be twofold. First, it would strip credibility even from any defence commitment to Ukraine eventually signed by Trump. Second, it would confirm Putin’s long-held belief: that Europeans are structurally divided, decadent, and feeble. The next aggression—whether in Ukraine or elsewhere—would thus be only a matter of time. For Putin, *Russkiy Mir* is not a political choice but an essential feature of Russia itself, much as *Sonderweg* was for German nationalism.

This factor also makes Ukraine’s case very different from the “Korean model.” For Putin, Ukraine is not a territorial issue but an existential one. In his view, a “piece of Russia” choosing to become a liberal democracy integrated with Europe is utterly intolerable. If Europe proves unable to respond to the challenge by building credible deterrence along the lines already indicated, a new conflict will become inevitable. That would likely produce a new awakening—like that of the democracies after Munich—but certainly a very painful one. But that, as the saying goes, is another story.