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European security in a time of war

Standing with Ukraine, against Russia and without the US

By Ian Bond



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- ★ European security structures have been tottering for more than a decade, first under the impact of Russia's annexation of Crimea and then following its full-scale attack on Ukraine. Donald Trump's two terms as US president have provoked European worries about the reliability of NATO defence guarantees.
- ★ There are good reasons for EU and NATO member-states on Russia's border to be concerned about the risk of a military confrontation. But as well as the threat from Russia, Europe also faces domestic threats from political extremism and other forces that seek to divide European societies.
- ★ Ukraine is often portrayed as a state split between Ukrainian-speakers and Russian-speakers with different views of the country's orientation: should it face towards Brussels or towards Moscow? In reality, divisions have rarely been as deep as Russian narratives claimed, and since Russia's full-scale invasion in 2022, support for integration with the EU has risen sharply in the east.
- ★ Ukraine has made its choice, but it still has many hurdles to overcome before it can join the EU. It must not fall back into old, corrupt ways of doing things. The EU must circumvent opposition to Ukraine's membership from some member-states and vested interests, and somehow balance the geopolitical imperative of Ukrainian membership against the need to maintain high standards of governance – something it has struggled with since the 2004 round of enlargement in Central Europe.
- ★ Russia has historically oscillated between trying to catch up with the rest of Europe, rejecting European influences, and seeing itself as Europe's superior. Putin started out in 2000 by looking for closer co-operation with the EU, but has become more and more Eurasianist, claiming for Russia the status of a unique civilisational power and a hegemon in the territory of the former Russian empire.
- ★ Russian leaders have made two attempts to get the West to accept a Russian sphere of influence in Eastern Europe, first with Dmitry Medvedev's 'European Security Treaty' in 2008-2009, and then with two draft treaties put forward by Russia in December 2021, which sought to leave large parts of Central Europe defenceless and to remove US nuclear deterrent forces from Europe. Putin is now intent on creating a sphere of influence by force rather than through treaties.
- ★ At some point, the war in Ukraine will end. But Russia's restrictive view of Ukrainian sovereignty is likely to remain, even after Putin. It is hard to imagine Europe building security with Russia for the foreseeable future; it will have to reconcile itself to building security against Russia. It will also have to deal with the prospect of doing it without the US – an increasingly unreliable partner.

- ★ The challenges the US poses to Europe are growing more complicated. Not only is the US likely to provide much less military support to Europe in future; people in or associated with Trump's administration have been exacerbating Europe's domestic divisions and giving encouragement to right-wing populists sympathetic to Russia and hostile to European integration. Trump's most recent peace plan for Ukraine, before it was modified as a result of Ukrainian and European opposition, would not only have put Russia in a stronger position vis-à-vis Kyiv; it would have threatened the broader interests of Europe.
- ★ Europe needs not only to strengthen its defence capabilities but to increase the resilience of its societies. Only then can it think about structures, perhaps based on the Organisation for Security and Co-operation in Europe, for managing what is likely to be a long-term stand-off with Russia. But as long as Russia seeks to dominate its Eastern European neighbours, it is hard to see how the rest of Europe can do anything other than defend them, and itself. The logic of Putin's world-view, in which Russia is a 'besieged fortress', is that as each neighbour is subdued, the next country becomes a threat.

This policy brief takes as its inspiration a series of three roundtables organised in 2024 by the Centre for European Reform and the University College London European Institute Jean Monnet Centre of Excellence. The first, held in Brussels in February, was entitled 'Ukraine's European future: Prospects and possibilities'. The second, in London in April, was 'The Russian presidential election'. The third, which took place in the British Embassy, Berlin, in September was entitled 'The future of European security'.

All three discussions took place against the background of Russia's full-scale war of aggression against Ukraine, by then in its third year. But even before February 2022, the previous structures of European security had already been shaken by Russia's 2014 annexation of Crimea and its intervention in eastern Ukraine, and by US President Donald Trump's first term in 2017-2021. It was clear that principles of international law such as the sovereignty and territorial integrity of states were under threat in Europe for the first time in decades. For the first time since World War Two, one European state had seized the territory of another, with the intention of keeping it and suppressing the identity of its inhabitants.

By the end of 2024, European countries no longer felt certain that the US would come to their aid if they were attacked. Trump had apparently had to be talked out of withdrawing from NATO during his first term, and continued to call into question US commitments to its European allies during his 2024 election campaign.¹

The first year of Trump's second term has further reinforced worries in Europe that many of the institutions and norms that helped to keep the peace in Europe during and after the Cold War are crumbling. Trump's repeated suggestions that he would take over Greenland (an autonomous territory of Denmark) and his refusal to rule out doing so by force marked an unprecedented

threat by one NATO member to the sovereignty of another.² In August 2025, the Danish foreign minister summoned the US Chargé d'Affaires in Copenhagen to complain about US covert operations in Greenland, designed to encourage secession and a transfer of sovereignty to the US.³

NATO's June 2025 summit meeting in The Hague briefly managed to create an impression of transatlantic unity. But the five-paragraph declaration that it issued, with only the briefest mention of Ukraine (and no repetition of previous promises of NATO membership) and no mention of EU-NATO co-operation, hinted at growing differences between the US and its European allies about the future of European security.

These differences threatened to break out again in August 2025, when Trump held a summit with Vladimir Putin in Alaska, and seemed sympathetic to Putin's territorial and other demands in Ukraine.⁴ It took a hastily arranged summit in Washington, attended by the leaders of Ukraine, the UK, Finland, France, Germany and Italy, the President of the European Commission and the Secretary General of NATO, to produce a more or less common position.⁵ This was only a temporary respite, however: in November 2025 the Trump administration produced a 28-point peace plan that would have rewarded Russia for its aggression while leaving Ukraine much less able

1: Kelly Garrity, 'Why John Bolton is certain Trump really wants to blow up NATO', *Politico*, February 13th 2024; James FitzGerald, 'Trump says he would 'encourage' Russia to attack Nato allies who do not pay their bills', BBC website, February 11th 2024.

2: Edward Helmore, 'Trump says he 'doesn't rule out' using military force to control Greenland', *The Guardian*, May 4th 2025.

3: Paul Kirby, 'US tells Denmark to 'calm down' over alleged Greenland influence operation', BBC News website, August 27th 2025.

4: Stanislav Pohorilov, 'Trump on land swap: Ukraine will regain "a lot of land"', *Ukrainska Pravda*, August 19th 2025.

5: Bernd Debusmann Jr and Laura Gozzi, 'Four key takeaways from Ukraine talks in Washington', BBC News website, August 19th 2025.

to resist a renewed attack, and would have increased the Russian threat to Europe. Ukraine and its European partners have managed to water down some of the most unacceptable elements of the proposal. At the time of writing, however, it is unclear whether Trump will maintain pressure on Ukraine to make concessions that would undermine its security.

Meanwhile, senior intelligence and military officers in Europe are warning that Russia is building an economy and society able to attack NATO in the coming years, and that European countries are unprepared to defend themselves. European governments have known for several years that they might not have much or any US help in a crisis. They have done too little to fill capability gaps, despite longstanding US signals of a pivot away from Europe, dating back to at least the Obama administration.⁶

European security, however, is not just a matter of military and other external threats to the continent. Europe must also be able to deal with growing internal threats from anti-democratic forces, and growing popular opposition to phenomena such as large-scale migration.

This policy brief starts by looking at the place in Europe of its two largest states, geographically – Ukraine and Russia. Ukraine wants to be part of Western institutions, but would have many obstacles to overcome, even if it was not at war. Russia not only does not want to be part of these institutions, but it wants to prevent Ukraine and other neighbouring states being part of them or benefitting from their protection. Putin does not regard Ukraine as a sovereign state, but as an integral part of historic Russian territory.⁷ The piece concludes by examining European security in the broadest sense, both external and internal, and what can be done to reinforce it.

Ukraine: Eastern Europe, Little Russia or grey area?

Ukrainian history and identity

The dilemma of where Ukraine ‘belongs’ goes back well beyond 2022 – indeed, the origins of its contested identity could be said to lie in the 9th century, when Kyiv became the capital of a territory inhabited mostly by Slavs but ruled by Vikings, known as Rus or Kyivan Rus.⁸ Rus had links with the Byzantine Empire as well as with Northern and Western Europe. The mid-11th century ruler of Kyiv, Yaroslav the Wise, made dynastic marriages between three of his daughters and the kings of France, Hungary and Norway – clearly positioning himself as a European monarch.

“European intelligence and military officers warn that Russia is building an economy and society able to attack NATO.”

The first recorded use of the term ‘Ukraine’ to describe roughly the area of modern Ukraine came in the late 12th century. In 1240, however, Kyiv fell to the Mongols, and apart from a brief period in the 17th century and an even briefer period after the 1917 Bolshevik revolution in Russia, no independent Ukrainian state existed until 1991. In the mid-12th century, one of Yaroslav’s great grandsons, Yuriy Dolgorukiy, had founded Moscow, and ‘Muscovy’ became the most important successor to Kyivan Rus, with Ivan the Terrible styling himself ‘Tsar of all Russia’ in the mid-16th century. Meanwhile, parts of the territory of

modern Ukraine were ruled at various times by Russia, Poland, Lithuania, the Austrian Hapsburgs, the Ottomans and the Crimean Khanate.

Putin’s contention that Ukraine is historically an integral part of Russia is reflected in the way that he and members of his administration, such as former president Dmitriy Medvedev, sometimes refer to Ukraine as ‘Malorossiya’ (‘Little Russia’).⁹ The use of this Tsarist era name is regarded (not surprisingly) as patronising by Ukrainians. Similarly, Putin went through a phase of describing southern Ukraine and Crimea by the Tsarist era name of the region, ‘Novorossiya’ (New Russia), particularly in 2014 when he was looking to expand his control of parts of southern and eastern Ukraine as far as Odesa.

The question after Ukraine gained its independence from the collapsing Soviet Union in 1991 was how Ukrainians saw their own identity and where they wanted to belong. Every region of Ukraine voted in favour of independence. Even Crimea, where ethnic Russians made up almost 70 per cent of the population, backed independence by 54 per cent to 42 per cent. Western commentary, perhaps influenced, consciously or unconsciously, by Russian narratives, often described Ukraine before the full-scale war began in 2022 as a country split between pro-Western Ukrainian-speakers and pro-Moscow Russian-speakers.¹⁰ In fact, even before Russia’s 2014 annexation of Crimea and intervention in eastern Ukraine, 80 per cent of the inhabitants of Ukraine described themselves to opinion pollsters as Ukrainian and only 17 per cent as

6: See, for example, Frank Gardner and Tessa Wong, ‘Russia may attack Nato in next four years, German defence chief warns’, BBC News website, June 1st 2025; ‘France’s top general says Russia could attack in five years’, *The Economist*, July 31st 2025.

7: Vladimir Putin, ‘Article by Vladimir Putin “On the Historical Unity of Russians and Ukrainians”’, Kremlin website, July 12th 2021.

8: For a detailed history of Ukraine, see Serhii Plokhyy, ‘The Gates of Europe’, 2015.

9: Björn Alexander Düben, ‘Revising History and “Gathering the Russian Lands”: Vladimir Putin and Ukrainian Nationhood’, *LSE Public Policy Review*, September 8th 2023.

10: See, for example, Jack Matlock, ‘Ukraine: Tragedy of a nation divided’, *Krasno Analysis*, University of North Carolina, Chapel Hill, December 14th 2021: “From its inception as an internationally recognized independent state, Ukraine has been deeply divided along linguistic and cultural lines”.

Russian. Moreover, language and ethnic identity were not coterminous: 40 per cent of those questioned spoke Ukrainian at home, 40 per cent spoke Russian, and 19 per cent spoke both equally.¹¹

There were regional differences over issues such as NATO membership (in 2015, with Russia occupying Crimea and part of the Donbas, the majority of those in western Ukraine said that they would vote in favour of it in a referendum; a plurality of Ukrainians in the east said that they would vote against). There were also differences in attitudes to the EU. Given a choice in 2015 between EU membership or membership of the Russian-dominated Eurasian Economic Union (EAEU), in western Ukraine 83 per cent favoured the EU; in the east, a plurality favoured the EAEU (but only by 28 per cent to 26). But overall, the country as a whole supported EU membership (55 per cent in favour) over EAEU membership (14 per cent).

“Ukraine has decided where it thinks it belongs; but does the rest of Europe agree?”

Not surprisingly, in the context of consistent levels of popular backing for the EU, membership has been the stated goal of Ukrainian presidents since Leonid Kuchma (elected in 1994). Kuchma declared EU membership a strategic objective in 1996, and published a strategy to pursue it in 1998. In a 2003 paper, Kataryna Wolczuk of Birmingham University described support for European integration as “an inherent element of ideology of any political force, which supports Ukrainian independence”.¹² Even Viktor Yanukovich, the Russian-oriented president who failed to sign the EU-Ukraine association agreement in 2013 and was driven from office in February 2014 by the Euromaidan protests, had come to office in 2010 proclaiming (however insincerely) his intention of joining the EU eventually.

Since then, both the events of 2014 and Russia’s full-scale invasion have alienated many of those who previously favoured closer ties to Russia. The assault on its sovereignty has reinforced Ukraine’s desire not to be left in a grey area between the West and Russia. Judged solely on the basis of Putin’s desire to show that Russians and Ukrainians are one people, Russia’s actions seem to have been entirely counterproductive. They have narrowed the gaps between eastern and western Ukraine over the country’s foreign policy alignment. In the September–October 2024 International Republican Institute poll, 59 per cent of Ukrainians in the east and 79 per cent of those in the west supported NATO membership; 34 per

cent of those in the east and 20 per cent of those in the west favoured neutrality (though with Russia controlling a significant part of the east, it may be that some of the opponents of EU and NATO membership are now in occupied Ukraine and out of reach of the pollsters).¹³

The change in attitudes to the EU in the east has been even more dramatic: EU membership is now backed by 70 per cent, compared with 79 per cent in western Ukraine, while only 4 per cent in the east (and 1 per cent in the west) prefer membership of the EAEU.

Ukraine’s quest for EU membership

Ukraine has (more or less) decided where it thinks it belongs; but does the rest of Europe agree? From Kuchma’s 1996 statement until 2022, the EU was at pains to avoid giving Ukraine a membership perspective, let alone candidate status. The closest it got was a statement by EU foreign ministers on the day before Yanukovich fled from Kyiv in 2014, recalling that the EU-Ukraine Association Agreement “does not constitute the final goal in EU-Ukraine cooperation” – but this left open the question of what the final goal was.¹⁴

The question was only answered after Russia’s full-scale invasion, when European Commission President Ursula von der Leyen told Euronews that Ukraine was “one of us and we want them in”.¹⁵ After that, the membership process at first unrolled extremely quickly. Ukraine submitted its formal application a day after von der Leyen’s statement, and completed its answers to the Commission’s questionnaire on its preparedness to become a member on May 9th 2022. On June 23rd that year the European Council gave Ukraine candidate status, subject to progress on seven points (mostly related to the rule of law and democratic governance).

Obstacles to EU membership on the EU side

Following progress on these issues, the European Council of December 2023 discussed opening accession negotiations with Ukraine – but could only agree to do so once Hungarian Prime Minister Viktor Orbán had been persuaded to leave the room, allowing the decision to be taken ‘unanimously’ by the remaining 26 countries.¹⁶ This was a sign of trouble ahead: although accession negotiations opened formally in June 2024, the process has effectively come to a halt in the face of Hungarian obstruction – though other member-states, with their own concerns about Ukrainian membership or EU enlargement more generally, may find Hungary’s opposition to it convenient.

11: ‘Public Opinion Survey Residents of Ukraine August 27–September 9, 2013’, The International Republican Institute.

12: Kataryna Wolczuk, ‘Ukraine’s policy towards the European Union: A case of declarative Europeanization’, Stefan Batory Foundation, 2003.

13: ‘National survey of Ukraine, September–October 2024’, Center for Insights in Survey Research, on behalf of the International Republican Institute.

14: ‘Council conclusions on Ukraine: Foreign Affairs Council meeting, Brussels, 20 February 2014’, Council of the European Union, February 20th 2014.

15: Méabh McMahon, ‘Ukraine is one of us and we want them in EU, Ursula von der Leyen tells Euronews’, Euronews, February 27th 2022.

16: Hans von der Burchard, ‘Scholz gets Orbán out the room to open Ukraine’s membership talks’, *Politico*, December 15th 2023.

Negotiations are organised around six ‘clusters’. These are groups of related issues, for each of which Ukraine has to show how it plans to align itself with the *acquis communautaire*, – the corpus of EU law and regulations governing each area. On September 29th 2025 the Commission announced that the screening process for all six clusters had been completed, but the Council has not approved the Commission’s report on any of the clusters, which means that negotiations cannot start. Orbán and his government have continued to block any progress.

“Though von der Leyen spoke of Ukraine joining the EU by 2030, there are serious hurdles to overcome.”

In June 2025, Orbán organised a consultative referendum in Hungary, after which he claimed that 95 per cent of those who voted (turnout was about a third of eligible voters) had rejected Ukrainian membership of the EU.¹⁷ Orbán faces a tricky election in 2026, with his Fidesz party trailing the opposition TISZA party in opinion polls. By demonising Ukraine with advertisements portraying it as a mafia state, and attacking its treatment of the ethnic Hungarian minority in the far west of Ukraine, Orbán hopes to attract more support to Fidesz as the defender of Hungary and Hungarians. His efforts to ensure that the accession process remains stuck are likely to continue until at least the 2026 elections, therefore.

Though Ursula von der Leyen spoke of Ukraine joining the EU by 2030 or – if it continued with its current pace of reforms – even earlier, there are a number of serious hurdles to overcome. Some are internal to the EU, some internal to Ukraine, and some the result of Russia’s war.

Within the EU, many member-states would like to see reforms of the way the Union operates before they agree to any enlargement. The Commission, in a March 2024 communication on pre-enlargement reforms, identified four areas for reform:

- ★ giving the EU the tools to ensure that states uphold the rule of law after joining the EU;
- ★ adapting policies such as the Common Agricultural Policy and regional development policy to accommodate more members;
- ★ addressing budgetary issues, starting with the 2028-2034 multi-annual financial framework;

17: Keno Verseck, ‘Orban to continue anti-Ukrainian course after referendum’, *Deutsche Welle*, June 27th 2025.

18: ‘Communication from the Commission to the European Parliament, the European Council and the Council on pre-enlargement reforms and policy reviews’, European Commission, March 20th 2024.

19: Yuliia Taradiuk, ‘Ukraine has no chance of joining EU until Volyn massacre issue is resolved, Polish minister says’, *The Kyiv Independent*, August 26th 2025.

★ improving governance, including by making more use of qualified majority voting and reducing the number of policy areas, such as foreign policy and taxation, in which a single member-state can veto a decision.¹⁸

Hungary may be the most obvious opponent of Ukrainian membership, but other countries have their own reservations – even those, like Poland, that are most supportive of Ukraine’s efforts to defend itself against Russia. For Poland, one issue is the complicated and painful history of Polish-Ukrainian relations. In 1943, Ukrainians in Volhynia/Volyn, an area that was part of pre-1939 Poland, committed massacres and other atrocities against Poles living in the area while fighting for an independent Ukraine. Polish politicians periodically demand an apology, and in August 2025 Polish Deputy Prime Minister and Defence Minister Władysław Kosiniak-Kamysz said that Ukraine would have no chance of joining the EU until it came to terms with what he called “the genocide in Volyn”.¹⁹ Poland’s president, Karol Nawrocki, also opposes Ukrainian membership of the EU (and NATO) until “civilisational issues” are resolved.²⁰

Of broader concern in a number of European countries is potential economic competition from Ukraine. In 2022, at a time when Russia had effectively closed Ukraine’s main ports and in particular Odesa, the EU suspended tariff rate quotas that limited the amount of agricultural and food products that Ukraine could export to the EU before paying tariffs. This led (as it was meant to) to an increase in Ukrainian exports to the EU, which led in 2023 to protests against the competition by farmers in Poland and elsewhere, and unilateral (and illegal) bans imposed by Hungary, Poland and Slovakia on grain imports from Ukraine. The European Commission stepped in to find a compromise solution, regulating to impose ‘emergency brakes’ when imports of certain products including wheat, maize, sugar and honey exceeded limits based on previous average exports. Protests by Polish farmers and lorry drivers have continued to block the Polish-Ukrainian border regularly since 2023, however.

Can the concerns of existing member-states about competition from Ukraine be resolved? In June 2025, Ukraine and the Commission agreed amendments to the EU-Ukraine Deep and Comprehensive Free Trade Agreement (DCFTA). The new agreement, once approved, will make it somewhat easier for Ukraine to export agricultural products to the EU, though without fully liberalising trade. But it also includes safeguard measures that can be triggered on the basis of very vague criteria by a single EU member-state, offering “vast opportunities for abuse of protective measures, potentially causing unpredictable disruptions to Ukraine’s exports”.²¹

20: Daniel Tilles, ‘I am against Ukraine’s EU entry,’ says Polish president-elect in first foreign interview’, *Notes from Poland*, June 9th 2025.

21: Svitlana Taran, ‘EU-Ukraine trade: From emergency measures to a renewed trade agreement’, European Policy Centre commentary, August 18th 2025.

Every time the EU enlarges, existing member-states worry about the impact that competition from new members will have on their own economies. Concerns from France and Italy about competition from Spanish and Portuguese fruit and vegetable growers delayed completion of the two countries' accession negotiations, and they were ultimately forced to accept a ten-year transition period before their exports of some agricultural products were fully liberalized. Ukraine would almost certainly also face a lengthy transition period before being allowed to compete on equal terms with the EU-27.

Negotiations on the EU's next seven-year budget, the multi-annual financial framework (MFF) for 2028-2034, may give some indication of how serious the EU is about admitting Ukraine. The two key areas to watch are the Common Agricultural Policy (CAP) and cohesion policy (which supports poorer areas of the EU). Before 2014, Ukraine had around 41 million hectares of agricultural land; by comparison, France had 27 million hectares and Spain 24 million hectares. Russia now occupies about 20 per cent of Ukraine, but it is hard to estimate how much of that is agricultural land, or how much agricultural land has either been contaminated by remnants of war or is too close to the front lines to be safely cultivated. Nevertheless, Ukraine probably still has more agricultural land than any existing member-state.

“Ukraine would face a lengthy transition period before being allowed to compete on equal terms with the EU-27.”

Though Ukraine would certainly see payments from the CAP phased in over several years – as was the case with the countries that joined the EU in 2004 – without any reform of the CAP Ukraine would eventually become its largest recipient. The amount of the budget allocated to the CAP could be increased, so that existing member-states would not see their own receipts decline. That, however, would be an undesirable reversal of the downward trend that has seen the CAP shrink as a share of the total EU budget from 72 per cent in 1984 to a projected 29 per cent by the end of the 2021-2027 MFF. Alternatively, current recipients could get less – a politically explosive idea in countries like France with influential farming lobbies.

When it comes to cohesion funds, Ukraine would expect to be a major beneficiary. Its per capita GDP on a purchasing power parity basis is about 30 per cent of the EU average, according to World Bank data, and less than half that of the poorest current member-state, Bulgaria.

Detailed estimates by Bruegel, a leading economic think-tank based in Brussels, of the cost if Ukraine were already a member-state in the 2021-2027 MFF concluded that over the seven-year period it could have expected to receive €32 billion in cohesion policy payments, €85 billion in CAP payments and €7 billion in payments from other EU programmes.²² The cohesion fund figure reflects the fact that cohesion policy payments are capped at 2.3 per cent of GDP per year for member-states whose gross national income (GNI) per capita on a purchasing power parity basis is less than 55 per cent of the EU average; this figure tapers to 1.5 per cent for those whose GNI per capita is 68 per cent of the average or higher. Despite the taper, the cohesion payment cap would have the perverse result that Ukraine would receive significantly less than substantially richer countries.

Bruegel estimated that the overall cost to the EU of Ukraine's membership would have been 0.13 per cent of GDP for the 2021-2027 period. That seems a modest sum, but a study for the European Parliament's Budget Committee suggests that the effects on some member-states would be more severe, cutting their cohesion policy receipts by 15-22 per cent.²³ The accession of a large and much poorer country would lower the EU's average GDP per capita, bringing the current poorest member-states closer to the average and therefore reducing the maximum percentage of GDP that they would be eligible to receive. Politically, this is likely to be controversial in countries like Romania and Bulgaria. Devising a new cohesion policy that increases the cap on transfers to Ukraine and other very poor candidate countries, helping them to converge more quickly with the average GDP per capita in the EU, without damaging the interests of the poorest current member-states and without increasing the contributions of net payers too much, will be extremely difficult.

Obstacles to EU membership on the Ukrainian side

If the EU has work to do to be ready for Ukraine's accession, so does Ukraine. Although von der Leyen praised the pace of Ukraine's reforms when she visited Kyiv in February 2025, Ukraine still has a long way to go to meet EU standards. The Commission's 2025 overall enlargement report praises Ukraine, which has “demonstrated its strong commitment to its EU path, moving forward on key reforms”.²⁴ But its detailed examination of Ukraine's readiness for membership shows a more mixed picture. In a number of areas, including crucial ones such as judicial reform and public procurement, the Commission notes that its 2024 recommendations have only been partially implemented and remain valid.²⁵

22: Zsolt Darvas and others, 'Ukraine's path to European Union membership and its long-term implications', Bruegel policy brief, March 7th 2024.

23: Eulalia Rubio and others, 'Adapting the EU budget to make it fit for the purpose of future enlargements', Study for the BUDG Committee, European Parliament, January 2025.

24: '2025 Communication on EU enlargement policy', European Commission, November 4th 2025.

25: 'Commission staff working document: Ukraine 2025 Report', European Commission, November 4th 2025.

A specific concern for the EU and for Ukrainian civil society has been backsliding, particularly in the fight against corruption. Before the war, Ukraine had a reputation as one of the most corrupt countries in Europe, but it had started to establish independent institutions to investigate and prosecute corruption. The demands of the war made corrupt behaviour less acceptable. But it has not gone away, and Ukraine still needs robust anti-corruption institutions to suppress it. In July 2025, however, the Ukrainian parliament, the Verkhovna Rada, passed legislation subordinating the National Anti-corruption Bureau of Ukraine (NABU) and the Specialised Anti-corruption Prosecutor's Office (SAPO) to the Prosecutor General's Office (PGO). The legislation seemed to be promoted by the Presidential Administration (PA), and the goal appeared to be to suppress investigations of individuals connected with the PA. The PGO is seen by Ukrainian experts as more compliant with the wishes of the PA than NABU or SAPO. It took popular protests and pressure from the EU to get the Rada to restore the independence of the two agencies. The Commission's 2025 report on Ukraine highlights these and other developments, such as state pressure on civil society organisations involved in combatting corruption, and warns that they "cast doubts on Ukraine's commitment to its anticorruption agenda".

“Ukraine has the tools to fight corruption and satisfy the EU's requirements, if it chooses to use them.”

Ukraine needs to ensure that the EU can see that progress is being made: it cannot afford to alienate the institution on which it increasingly depends, both economically and militarily.²⁶ The resignation on November 12th 2025 of two ministers implicated in a corruption scandal involving the state nuclear power company Energoatom is a positive sign; the fact that Zelensky's former business partner, also implicated, was able to flee abroad before investigators could detain him is not. Anti-corruption investigators searched the apartment of Andrii Yermak, the powerful head of the presidential office and Zelensky's closest collaborator, on November 28th 2025. Yermak subsequently resigned under pressure. If investigators are able to follow the evidence where it leads and (in the event that they can prove corruption) secure a conviction, that will go a long way to proving that Ukraine has indeed changed. But the EU will not want to agree to Ukrainian accession, whatever the geopolitical arguments in favour of it, unless it is confident that old, corrupt habits will not reassert themselves.

Finding a mechanism to prevent democratic backsliding and high-level corruption is something that the EU has

26: Henrik Larsen, 'Tough love: How the EU should tackle corruption and the rule of law in Ukraine', CER insight, September 9th 2025.

27: Ian Bond and Agata Gostyńska-Jakubowska, 'Democracy and the rule of law: Failing partnership?', CER policy brief, January 20th 2020.

struggled with since its 2004 'big bang' enlargement in Central Europe. Candidate countries knew then that if they failed to meet EU standards, they were at risk of having their accession to the Union delayed. But once they were members, the mechanisms for disciplining them if they violated the rule of law or other EU values turned out to be almost unworkable.²⁷ The only slightly effective method to put pressure on countries in the event of democratic backsliding and corruption has been to make disbursement of EU funds conditional on respect for rule of law. But while conditionality has allowed the EU to withhold funding from Hungary as Orbán's rule has become more corrupt and authoritarian, it has not persuaded him to change course. While it remains a candidate country, Ukraine can expect very close scrutiny of its progress in rooting out corruption and institutionalising the rule of law; but the EU will also need to ensure that it can incentivise post-accession compliance with EU standards. The EU's enlargement commissioner, Marta Kos, has indicated that the Commission is at an early stage in considering measures such as a 'probationary period', during which new members could be sanctioned or even expelled for violations of the rule of law.²⁸

Obstacles to EU membership created by Russia

Ukraine has the tools to fight corruption and satisfy the EU's requirements, if it chooses to use them. But Kyiv and Brussels will face significantly greater difficulty in dealing with the problems that the war and Russian occupation of Ukrainian territory will pose for Ukraine's membership aspirations. Russia's invasion has created three linked problems, among many others, that the EU and Ukraine will need to find solutions to.

The first problem is whether the EU is willing to admit a country that is in a state of war. Article 42.7 of the Treaty on European Union states, "If a member-state is the victim of armed aggression on its territory, the other member-states shall have towards it an obligation of aid and assistance by all the means in their power". That is a more binding obligation than Article 5 of NATO's Washington Treaty (which speaks of each ally taking "such action as it deems necessary, including the use of armed force"), but it is also an obligation that the EU is not currently equipped to fulfil. Many member-states, not just Hungary, may be reluctant to admit Ukraine to the Union if that immediately forces them to come to its aid militarily. On the other hand, making the prior establishment of peace a condition for Ukrainian membership means giving Putin a veto over it: all he needs to do is keep the war going.

If the EU finds a way around the first problem and admits Ukraine to the EU while fighting is ongoing, or if the war ends with Russia still occupying part of Ukraine,

28: Barbara Moens and Henry Foy, 'EU moves to prevent 'Trojan horses' from joining bloc', *The Financial Times*, November 4th 2025.

the second problem is how EU single market rules can operate if Ukraine does not control all of its legally recognised territory. If Russians set up businesses in occupied parts of Ukraine, would the EU have to treat them as Ukrainian for customs and other purposes? In the case of Moldova, firms located in the separatist region of Transnistria have to be registered in Moldova to benefit from the terms of the EU-Moldova Association Agreement and Deep and Comprehensive Free Trade Agreement. This gives the Moldovan government some leverage over the breakaway region, and creates an incentive for Transnistria to integrate more closely with the rest of the country. Russian-owned firms in occupied Ukraine could use a similar arrangement as a back door into the EU, however, especially if some or all sanctions on Russia itself remained in place.

“Geopolitics dictate that the EU should fill the grey areas on its borders as soon as possible.”

The administrative problems would be worse if fighting continued and the line of control moved. The EU has experience of dealing with member-states that do not control all of the territory they claim, but not in such uncertain circumstances. Before German unification, a protocol to the Treaty of Rome governed trade across the inner German border. The boundary of Northern Cyprus has long been fixed.

A frozen conflict – along the lines of that in Cyprus – might be more administratively convenient for the EU than a shifting front line (regardless of any ethical or strategic considerations), and would make it easier to make and enforce rules on goods, services and people crossing the boundary. But Putin will not be interested in the EU’s administrative convenience. Arrangements for a divided Ukraine would be more complex than those for Germany or Cyprus, even if the line of contact could be stabilised. Either the EU would need to limit membership benefits (at least temporarily) to free Ukraine, and restrict Russian-occupied Ukraine’s access to EU markets (to prevent Russia from benefitting from it). Or the EU would need to extend these benefits across the whole legally-

recognised territory of Ukraine, while trying to manage the risk that Russian entities might benefit.

Differentiating between ‘legitimate’ and ‘illegitimate’ entities in Russian-occupied Ukraine would be challenging, as the EU’s experience of trying to differentiate between products from Israel and those from illegal settlements in the occupied West Bank shows. The EU has rules giving trade privileges to the former but not the latter, but implementation remains patchy. If some sanctions against Russia remain in place, Russia would almost certainly seek to exploit any privileges extended to occupied Ukraine in order to circumvent restrictive measures.

The third problem, in circumstances of continued warfare, is what commitments the EU might have to make to invest in war-affected regions, given that these might be the most economically disadvantaged. The EU might not want to use cohesion funds to invest in infrastructure that would be constantly vulnerable to destruction, turning Ukraine into a money pit for the Union; but it would be hard to argue that Ukrainian civilians who have suffered (and continue to suffer) the most should be disadvantaged when Ukraine joins the EU.

For Ukraine and the EU to adapt themselves to Ukrainian membership and overcome the problems caused by Russia will take a long time. The challenge in the years to come will be for the EU to keep a sense of momentum, so that Ukrainians do not become disillusioned with the accession process, while maintaining strict conditionality, so that when Ukraine joins the EU, it does so having already solved its problems with the rule of law and good governance. The EU cannot ignore these problems, but it has somehow to balance the Union’s interest in maintaining norms and not importing bad practice against Ukraine’s role as the vanguard of Europe’s defence against Russia.

The geopolitics of confrontation with Russia dictate that the EU should fill the grey areas on its borders as soon as possible, starting with Ukraine as its most strategically important neighbour. Von der Leyen was right in her assessment that Ukraine belongs in the EU; but it cannot be the old Ukraine of crony capitalism and shady deals with Russia.

Russia: Easternmost Europe, westernmost Asia or a unique civilizational power?

Russian history and identity

If Ukraine seems to have made its choice in favour of Europe, Russia has – for now – made a different choice. Historically, Russia has had complicated relations with its western neighbours – sometimes actively engaged in European affairs, sometimes seeking to isolate itself from

them. It has sometimes viewed itself as a European power, sometimes as a country trying to catch up with Europe, and sometimes as a civilization superior to that of Europe.

In the 16th century, Orthodox Church figures like the monk Philotheus were in the ‘superior to Europe’ camp, describing Moscow as “the Third Rome”, in succession

to Rome itself and Constantinople.²⁹ Russian rulers were also beginning to engage more with their counterparts in Europe: in the later 16th century, Ivan the Terrible seems to have proposed marriage to Elizabeth I of England, unsuccessfully.³⁰ In the late 17th and early 18th centuries, Peter the Great was the force behind Russian efforts to catch up with its western neighbours. He spent time, in disguise, in England and the Netherlands, studying everything from shipbuilding to town-planning, before founding St Petersburg (on land conquered from Sweden) as an unquestionably European city – Russia’s ‘window on Europe’, as it is often described. From then onwards, Russia became one of Europe’s major powers. Though the other powers saw Russia as economically and socially backward (with serfdom only abolished in 1861), they did not question its Europeanness.

“Putin’s ‘Russian world’ extends beyond Russia’s borders and includes people who want no part of it.”

There were those in Russia who did, however. In the 19th century, there were the Slavophiles, who rejected the influence of Western Europe on Russia, and believed that all the Slavic peoples should be under Russian suzerainty. In the 20th and 21st centuries, there have been Eurasianists, who see Russia as a unique power, neither European nor Asian but fusing elements of both. Russia’s 2023 foreign policy concept is essentially Eurasianist: it describes “Russia’s special position as a unique country-civilization and a vast Eurasian and Euro-Pacific power that brings together the Russian people and other peoples belonging to the cultural and civilizational community of the Russian world”.³¹

Putin, Europe and the ‘Russian world’

Putin’s view of the ‘Russian world’ (‘Russkiy mir’) reflects Eurasianist thought: it extends far beyond Russia’s current international borders and includes people, including the Ukrainians, who do not consider themselves part of it, and do not want to be. Putin has cited the Eurasianist thinker Ivan Ilyin – a proponent of autocracy as Russia’s form of government and an opponent of Ukrainian independence, who was active in the Russian diaspora

after the Bolshevik revolution – in a number of speeches, and listed him as one of his favourite philosophers.³² There is a close correlation between Putin’s belief that Russians and Ukrainians are one people and that Ukraine’s post-2014 pro-European administrations are the product of an American-organised coup, and Ilyin’s view that Ukrainian separatism was an artificial phenomenon, arising from “international intrigue for conquest” and that Russia and Ukraine “are linked together by faith, tribe, historical destiny, geographical position, economy, culture and politics”.³³

But Putin did not come to power as a pure Eurasianist. He initially stressed Russia’s European aspects, and sought to shape Europe’s future institutional arrangements through co-operation. While making clear that he did not aspire to EU membership, he called for closer relations: in his 2003 address to the Federal Assembly (Russia’s bicameral parliament), he spoke of “becoming truly integrated into Europe”.³⁴

As prime minister in 1999, Putin had presided over the publication of Russia’s ‘Strategy for the development of relations of the Russian Federation and the European Union for the medium term (2000-2010)’ – a response to the EU’s June 1999 ‘common strategy’ for relations with Russia. While the Russian strategy called for “dramatically improving the effectiveness of co-operation and its quality”, it also contained a hint of the problems to come: “As a world power situated on two continents, Russia should retain its freedom to determine and implement its domestic and foreign policies, [and] its status and advantages of a Euro-Asian state.”³⁵

With the prospect of EU enlargement to the states of Central and Eastern Europe in mind, Russia sought to influence the EU while retaining its own room for manoeuvre. One product was the four ‘Common Spaces’, initially proclaimed at the EU-Russia summit in St Petersburg in May 2003, and eventually adopted, after long negotiations, in May 2005. These covered the economy; freedom, security and justice (in other words, law enforcement co-operation and the possibility of visa liberalisation); external security; and research, education and culture. But, as the former EU ambassador in Moscow Michael Emerson wrote, the Common Spaces gave “only token attention to democracy and exclude[d] explicit

29: Vladimir Kolesov, ‘Poslaniya Startsa Filofea’ (Messages of the elder Philotheus); Institute of Russian literature (Pushkin House) of the Russian Academy of Sciences, 1984.

30: George Gross, ‘Ivan IV and Elizabeth I: The influence of the Tsar’s matrimonial endeavours on the development of Russo-English relations’, RUDN Journal of Russian History, 2019.

31: ‘The concept of the foreign policy of the Russian Federation’, Ministry of Foreign Affairs of the Russian Federation, March 31st 2023.

32: ‘Valdai Discussion Club meeting’, Kremlin website, October 21st 2021.

33: Ivan Ilyin, ‘Osnovy bor’by za natsional’nuyu Rossiiu’ (Foundations of the struggle for a national Russia), 1938, cited in Aleksandr Zvyagintsev, ‘V 1938 godu filosof, ideolog belovo dvizheniya Ivan Il’in dal tochniy prognoz sobytiy na Ukraine’ (In 1938 the philosopher and ideologist of the white movement Ivan Ilyin gave a precise forecast of events in Ukraine), *Rossiyskaya Gazeta*, May 25th 2022.

34: ‘Annual address to the Federal Assembly of the Russian Federation’, Kremlin website, May 16th 2003.

35: ‘The medium-term strategy for the development of relations between the Russian Federation and the EU, 2000-2010’, cited in Dov Lynch, ‘Russia’s strategic partnership with the Europe’, *Washington Quarterly*, spring 2004.

reference to EU norms as the reference for Russian-EU convergence.”³⁶ While almost every other country in Europe was either a member of the EU, seeking to be a member or adopting EU norms while remaining outside it, Russia was seeking its own political and economic course.

At the same time, Putin was trying to push back against the expansion of NATO and against Western efforts to focus the attention of pan-European bodies like the Organisation for Security and Co-operation in Europe (OSCE) on conflicts and problems of human rights and political freedoms in the former Soviet space. In his speech to the Munich Security Conference in February 2007, Putin claimed that “NATO expansion does not have any relation with the modernisation of the Alliance itself or with ensuring security in Europe. On the contrary, it represents a serious provocation that reduces the level of mutual trust.”³⁷ He complained that people were trying to transform the OSCE “into a vulgar instrument designed to promote the foreign policy interests of one or a group of countries.”

“Russia’s desire to constrain the activity of Western organisations in Central and Eastern Europe resurfaced in 2021.”

Russia’s ideas for European security architecture

Since then, Russia has made two attempts to get the West to engage with proposals for a different kind of security architecture for Europe. In 2008 and 2009, Russian president Dmitriy Medvedev put forward proposals for a legally binding European security treaty, beginning with a speech to the Bundestag in Berlin in 2008. Medvedev claimed that “Atlanticism as a sole historical principle has already had its day. We need to talk today about unity between the whole Euro-Atlantic area from Vancouver to Vladivostok”, and called for a treaty on European security to which international organisations in the area could become signatories. Medvedev suggested that such an agreement “could achieve a comprehensive resolution of the security indivisibility and arms control issues in Europe” – “indivisible security” being coded language for a Russian veto on NATO enlargement, which in the Russian view created “zones with differentiated levels of security”.³⁸

Medvedev’s proposal led to inconclusive discussions in the OSCE, known as ‘the Corfu Process’ because they began with an informal meeting of foreign ministers in Corfu. But the Russians did not put forward a formal

proposal until November 2009.³⁹ Their draft European Security Treaty was largely focused on constraining Western organisations: Article 2 stated “A Party to the Treaty shall not undertake, participate in or support any actions or activities affecting significantly security of any other Party or Parties to the Treaty”; Articles 4-6 set out procedures for a treaty signatory to call for consultations, and subsequently a ‘Conference of the Parties’, in the event that it decided that the treaty had been violated or was under threat of being violated. Decisions of the Conference of the Parties would be binding (though since they would be adopted by consensus, presumably the state accused of violating the treaty would have been able to prevent any decision being taken).

By the time the draft was put forward, however, Russia had already fought a war with Georgia, at the end of which it recognised Abkhazia and South Ossetia, the two separatist areas of Georgia, as independent states; and Medvedev had put forward principles for Russia’s foreign policy that included the idea that Russia had “privileged interests” in some countries in its neighbourhood. Though some echoes of Medvedev’s treaty draft appeared in the Astana OSCE summit declaration in December 2010, including the idea that states would not strengthen their security at the expense of other states, the text also included principles that Medvedev and Putin (then prime minister) would have found more problematic, including the freedom of each state “to choose or change its security arrangements, including treaties of alliance”.⁴⁰ The declaration also repeated a key post-Cold War principle in relation to human rights: “We reaffirm categorically and irrevocably that the commitments undertaken in the field of the human dimension are matters of direct and legitimate concern to all participating States and do not belong exclusively to the internal affairs of the State concerned.”

Work to establish a ‘security community’ in the OSCE area continued in the framework of the ‘Helsinki+40’ process, with the aim of reaching agreement before the 40th anniversary of the 1975 Helsinki Final Act, but Russia – with Putin once again as president – had largely lost interest. The idea of a security community effectively died with Russia’s annexation of Crimea in 2014.

Russia’s desire to constrain the activities of Western organisations in Central and Eastern Europe had not gone away, however, and resurfaced in 2021, as tension over the possibility of a Russian attack on Ukraine grew. In December 2021, Russia presented the US with two draft treaties, one a bilateral agreement on security guarantees, and the other on measures to ensure the security of

36: Michael Emerson, ‘EU-Russia: Four Common Spaces and the proliferation of the fuzzy’, Centre for European Policy Studies policy brief, May 2005.

37: ‘Speech and the Following Discussion at the Munich Conference on Security Policy’, Kremlin website, February 10th 2007.

38: ‘Speech at Meeting with German Political, Parliamentary and Civic Leaders’, Kremlin website, June 5th 2008.

39: ‘The draft of the European Security Treaty’, Kremlin website, November 29th 2009.

40: ‘Astana commemorative declaration: Towards a security community’, Organisation for Security and Co-operation in Europe summit meeting, Astana 2010, December 3rd 2010.

Russia and members of NATO.⁴¹ The contents of both amounted to a Russian demand that NATO dismantle its defences in Central Europe, prohibit Ukraine or other former Soviet states from joining the alliance and stop conducting military exercises above brigade level in an (unspecified) zone along the border between NATO and Russia, while the US should withdraw nuclear weapons to its own territory – effectively establishing a de facto and de jure Russian sphere of influence in Central and Eastern Europe. Though the US sent a relatively emollient response, offering to negotiate on arms control and transparency measures, Russia proceeded with its full-scale invasion of Ukraine on February 24th, ending, for the time being, to any effort to come up with new European security architecture.⁴²

“Whether he leaves the Kremlin voluntarily or not, Putin will not be in power forever.”

Opinions varied on how seriously the two drafts should be taken: one commentator, writing in early February 2022, asserted that “one Western line about Russia’s demands has already been proved false: namely, that they were never intended as a serious basis for negotiations; and that Russia always planned to use their rejection as a pretext to invade Ukraine. Clearly, if that were the case, Russia would have invaded by now.”⁴³ Another was more doubtful about Russian motives and intentions: “Perhaps negotiations are not what the Kremlin wants. It is simply looking for a reason – a pretext possibly – to feel sufficiently aggrieved that a new major offensive military operation now feels not only justified, but also necessary.”⁴⁴ The sceptic was proved right: though Putin or other Russian leaders may at some point return to the draft treaties, for the moment Russia’s effort is concentrated on creating a sphere of influence by force.

The autocratisation of governance in Russia has gone on in parallel with its rejection of Western structures for European security and prosperity. Personalist

autocracy is incompatible with acceptance of the kind of checks that the EU, the Council of Europe and (to a lesser extent) NATO impose on their members. Putin has presided over the de-institutionalisation of Russia domestically, disempowering bodies like the Duma (the lower house of the Federal Assembly), which frequently stood up to his predecessor Boris Yeltsin; but he has also rejected international limits on his actions, ignoring OSCE commitments to such things as free elections, failing to abide by arms control agreements such as the Conventional Forces in Europe (CFE) treaty and ultimately violating the UN Charter.

Will Russian policy change after Putin?

Whether he leaves the Kremlin voluntarily or not, Putin will not be in power forever. The personalised nature of his rule makes it hard to know whether a successor would be equally determined to continue the war (if it is still going at that point). But it seems likely that the next Russian leader will follow Putin’s example in treating Ukraine as a natural part of Russia’s sphere of influence, if not Russian territory.

Unlike the Soviet Union, Russia has no comprehensive state ideology. But it seems to have been an article of faith among Russian leaders since the break-up of the Soviet Union that Ukraine’s sovereignty should be conditional, not absolute. Even in the Yeltsin era, when Russia was often aligned with the West on foreign policy issues, Moscow was reluctant to agree to delineate Ukraine’s borders without extracting a price, in the form of a long lease on Sevastopol, the headquarters of what had been the Soviet Black Sea Fleet, and had now become the Russian Black Sea Fleet.⁴⁵ Putin’s view of Ukraine as inseparable from Russia seems to be shared by much of the Russian population: on the eve of the war, a poll conducted for CNN showed that almost two thirds of those questioned already agreed with Putin that Russians and Ukrainians were one people.⁴⁶ The regime is seeking to ensure that the next generation share this belief, stepping up indoctrination at school.⁴⁷

European security once the war is over

External and domestic threats to European security

For almost four years European security has been defined by Russia’s war of aggression against Ukraine. Though at

the time of writing the end of the war still seems far away, at some point it will end. What security arrangements will then be needed to ensure Europe’s future stability? The Soviet Union’s last leader, Mikhail Gorbachev, called for

41: ‘Press release on Russian draft documents on legal security guarantees from the United States and NATO’, website of the Embassy of the Russian Federation to the United Kingdom of Great Britain and Northern Ireland, December 17th 2021.

42: Hibaí Arbide Aza and Miguel González, ‘Los documentos confidenciales sobre Ucrania: EE UU y la OTAN ofrecieron a Putin acuerdos de desarme’ (Confidential documents on Ukraine: US and NATO offered Putin disarmament agreements), *El País*, February 2nd 2022.

43: Anatol Lieven, ‘Leaked drafts of NATO, US responses to Russia are surprisingly revealing’, *Responsible Statecraft*, February 3rd 2022.

44: Alexander Lanoszka, ‘How NATO should greet Russia’s draft treaty’, *Britain’s World*, December 20th 2021.

45: Katarzyna Wolczuk and Rilke Dragneva, ‘Russia’s longstanding problem with Ukraine’s borders’, Chatham House explainer, October 13th 2022.

46: Savanta ComRes, ‘Russians/Ukrainians Poll – CNN – 23 Feb’, February 23rd 2022.

47: Flemming Splidsboel Hansen, ‘Tomorrow’s young soldiers: The patriotic socialisation of children in Russia’, in Niels Bo Poulsen and Jørgen Staun (editors), ‘Russia at war: Intention and military capability after Ukraine’, 2025.

a 'common European home', but after Russia's assault on Ukraine, it is hard to imagine the West building security in Europe with Russia for the foreseeable future. It will have to reconcile itself to building security against Russia.

The security threats to Europe are not limited to those that Russia poses, however. European governments have to deal with a wide range of external and internal threats, and to do so at a time when most of them are domestically unpopular and beset by economic problems, and when the transatlantic relationship, which has helped to keep the peace in most of Europe for the last 80 years, is under severe strain.

“Europeans will have to reckon with the possibility that the US will significantly reduce its contribution to NATO.”

Europe's growing need to defend itself

In the past, Europeans could always rely on the US to keep Russia at bay, but that is no longer the case. The Trump administration contains few if any traditional Republican foreign and defence policy hawks, and even fewer who are focussed on Europe rather than the Indo-Pacific region. Trump himself has often shown deference to Putin, including at the Alaska summit. The latest US 'peace plan', presented in November 2025, offered Russia much of what it had sought since early in the war, including territory that it had not yet conquered, restrictions on the size of Ukraine's armed forces, and guarantees that Ukraine would not be allowed to join NATO and that NATO troops would not be stationed in Ukraine. In addition, there were promises of US investment in Russia and immunity from prosecution for war crimes.⁴⁸ In return, Ukraine would be allowed to join the EU and would get "a security assurance modelled on the principles of Article 5 of the North Atlantic Treaty", which would be triggered in the event of "a significant, deliberate, and sustained armed attack by the Russian Federation across the agreed armistice line into Ukrainian territory". The precise response from the US and its partners would be determined by the US president after consulting Ukraine and NATO allies.⁴⁹ Ukraine, with the backing of its European partners, was able to persuade the US to drop some of the more unacceptable elements in the plan.

In strengthening Russia's position relative to Ukraine and its European partners, the US plan would have been more likely to produce renewed war than peace. The fact that the

US was willing to put forward a plan that would undermine its NATO allies' security in this way underlines the need for Europe to invest in protecting itself and its neighbourhood without assuming that it will get help from the US.

This protection is not just a matter of increasing defence spending (though that is certainly necessary). The EU is seeking to ensure that Europe uses its defence budgets efficiently, through joint procurement and economies of scale. But some major defence industrial players are not members of the EU – in particular, Turkey and the UK. Nor is Ukraine – though its innovative defence producers will have preferential access to the EU's SAFE (Security Action for Europe) programme, designed to support joint procurement with EU loans. In peacetime, it would be understandable for EU governments to treat defence spending as a form of industrial policy, benefitting their own economies; but with the military threat to Europe at its current level, the priority should be to work with any likeminded partner with the defence industrial capacity to contribute to European – including Ukrainian – security.

Less US protection, more US disruption

Europeans will also have to reckon with the possibility that the US will significantly reduce its contribution to NATO's forces and command structure in Europe. Washington has already announced that it will withdraw 800 troops from Romania.⁵⁰ There have been persistent rumours that the US National Defence Strategy and its Global Force Posture Review, both of which are overdue for publication, will involve a new focus on homeland defence and the Western hemisphere, with the US doing less to protect its allies (and its interests) in Europe or the Indo-Pacific region.⁵¹

At the same time, members of the Trump administration and their ideological soulmates are exacerbating some of the internal threats to Europe. The rise of (mostly right-wing) eurosceptic and populist parties in most European countries reflects polarisation in European societies, the effects of economic stagnation and hostility to migration. Russia was quick to spot the potential value of populist parties in creating or increasing divisions in Europe: in 2014, a Kremlin-linked bank provided France's far-right *Front National* with a €9 million loan; Russia's RT propaganda channel regularly provided a platform pro-Brexit politicians like Nigel Farage in the UK; and in 2025 Petr Bystron, a German MEP from the far-right *Alternative für Deutschland*, was stripped of his parliamentary immunity in the context of an investigation into his acceptance of illicit funds from Russia.⁵²

48: 'Read the full text of Trump's 28-point Ukraine-Russia peace plan', *The Financial Times*, November 21st 2025.

49: Barak Ravid, 'Trump peace plan for Ukraine includes NATO-style security guarantee', *Axios*, November 20th 2025.

50: Victor Jack, 'Romania calls on US to 'overturn' troop drawdown', *Politico*, November 6th 2025.

51: Paul McLeary and Daniel Lippman, 'Pentagon plan prioritizes homeland over China threat', *Politico*, September 5th 2025.

52: Gabriel Gatehouse, 'Marine Le Pen: Who's funding France's far right?', BBC News website, April 3rd 2017; Patrick Wintour and Rowena Mason, 'Nigel Farage's relationship with Russian media comes under scrutiny', *The Guardian*, March 31st 2014; Vincenzo Genovese, 'German far-right MEP stripped of immunity over Russian bribe charge', *euronews*, May 6th 2025.

Despite the abundant evidence of Russian attempts to subvert European democratic processes and to cultivate right-wing populist parties as their preferred tools for doing so, however, US Vice-President J D Vance's speech to the Munich Security Conference in February 2025 did not focus on the threat to Europe from Russia. Instead, he criticized European governments for seeking to tackle disinformation and misinformation, ensure that Russian influence operations did not affect the results of elections and limit the platform offered to extremists of right and left.⁵³ What is more, the current US government and those close to it have supported far-right and populist politicians in Europe. Tech entrepreneur and former Trump adviser Elon Musk appeared online at a rally in London organised by the right-wing extremist Stephen Yaxley-Lennon (known as 'Tommy Robinson') and told participants "Whether you choose violence or not, violence is coming to you. You either fight back or you die".⁵⁴ Trump and Vance criticised the conviction in France of Marine Le Pen, leader of France's far-right Rassemblement National (the renamed Front National), on embezzlement charges, with Trump describing it as a "witch hunt".⁵⁵ In a post on X, US Secretary of State Marco Rubio criticised the German security service's decision to classify the AfD as extremist, claiming "What is truly extremist is not the popular AfD ... but rather the establishment's deadly open border immigration policies that the AfD opposes".

“Europe will have to build its security both against Russia and without the US.”

Taken together, these developments in Europe's security landscape suggest that at least for the remainder of Trump's term of office and potentially for much longer, Europe will have to build its security both against Russia and without the US. Some European leaders are making the case for this in public: German chancellor Friedrich Merz used his victory speech after his election in February 2025 to state that his absolute priority would be "to strengthen Europe as quickly as possible so that, step by step, we can really achieve independence from the USA".⁵⁶ Polish foreign minister Radosław Sikorski wrote in May 2025 "We must be prepared for the US to wash its hands not only of Ukraine, but even of Europe."⁵⁷

European defence spending is indeed beginning to rise: a combination of fear of Russian aggression and the desire not to be hectored by Trump produced a commitment

at the June 2025 NATO summit meeting in The Hague to increase core defence spending to 3.5 per cent of GDP by 2035, with a further 1.5 per cent for more general defence- and security-related spending, for example on transport infrastructure.

Models for collective defence

But extra defence spending, while a necessary condition of democratic Europe's security, is not a sufficient one. Even though Article 42.7 of the Treaty on European Union provides a binding security guarantee for EU member-states, the EU is not the best vehicle for the collective defence of Europe if the US withdraws its forces from the continent wholly or partially. But without the US, NATO would also struggle. NATO has provided Europe with an integrated command structure – something that the EU lacks, and could not provide, given that its membership does not include some of Europe's main military powers. But if the US draws down its forces in Europe as expected, it is likely to leave significant gaps in the NATO command structure, as well in frontline forces and enablers. And Ukraine, which now has Europe's largest and most battle-hardened army, is a member neither of NATO nor the EU.

The 'European pillar' of Europe's defence may need to be something along the lines of the Western European Union (WEU), which, before it was absorbed by the EU in 2011, gave all EU and NATO member-states a seat at the table as full members (for those in both the EU and NATO), observers (in the EU but not NATO) or associate members (in NATO but not the EU).⁵⁸ The WEU treaty also included a binding security guarantee, on which the EU treaty's Article 42.7 is based, though in practice that was irrelevant, since it was NATO which had the forces and command structures to defend Europe. Now, however, it may be necessary to recreate something like the WEU, separate from both the EU and NATO, with Ukraine as a member, able to draw on NATO assets and plug into NATO command structures and headquarters, but without relying on the US to contribute. In effect, this might give treaty form to the 'coalition of the willing' that has been working to put together a post-ceasefire reassurance force for Ukraine. Such an organisation could ensure that even if Ukraine's progress towards EU and NATO membership slowed, it would still be covered by a defence guarantee from its partners that would not be dependent on the whim of the US president of the day. Such a guarantee would reduce Ukraine's chances of falling into a security void or being constantly subjected to Russian coercion.

53: Benedikt Franke (ed), 'Munich Security Conference 2025: Speech by JD Vance and selected reactions', Volume II of the series 'Selected Speeches held at the Munich Security Conference', April 2025.

54: Esme Stallard, 'Musk's fellowship of Royal Society in doubt after rally address', BBC News website, September 18th 2025.

55: 'Trump and Vance support Marine Le Pen after her conviction', *Le Monde* (in English), April 4th 2025.

56: Tim Ross and Nette Nöstlinger, 'Germany's Merz vows 'independence' from Trump's America, warning NATO may soon be dead', *Politico*, February 23rd 2025.

57: Radosław Sikorski, 'Europe's Existential Choice', *Project Syndicate*, May 19th 2025.

58: Ian Bond, 'NATO summit 2025: Time to build a proper European pillar?', Centre for European Reform insight, June 2nd 2025.

The need for domestic resilience

Apart from investing in increasing Europe's defence industrial capacity, which should also involve increased co-operation with Turkey, Ukraine and the UK, the EU needs to address domestic resilience. This will be a challenge: with eurosceptic populists in power or members of coalition governments in several member-states, efforts from the rest to find solutions to problems through collective EU action are likely to run into resistance. But there is a real risk of European democracy crumbling from within – encouraged by both Russia and the US.

“Putin and his successors are unlikely to give up the idea of dividing Europe into spheres of influence.”

One (partial) answer is to improve Europe's defences against influence operations and covert action – from

whatever source – by improving media literacy and by putting more responsibility onto the major internet platforms to prevent the spread of disinformation. This is one of the pillars of the European Commission's new 'Democracy Shield'. This package of proposals includes measures to safeguard the integrity of the information space; exchanges of best practice and other efforts to ensure free and fair elections and reinforce media freedom; and programmes to increase societal resilience and the involvement of citizens in governance. In conjunction with the Democracy Shield, the Commission also plans to increase its support to civil society. These are all reasonable proposals, though they rely on the goodwill of member-states, who are responsible for issues such as the organisation of elections and the content of school curriculums. But Europe also has to provide economic opportunities and prosperity for its citizens, to reduce the sense of grievance that many feel. And it needs a unifying narrative – something that is hard for 27 governments and the European Commission to agree on and then deliver coherently.

Conclusion: Managing relations with Russia in the long term

Once Europe has re-established deterrence and made its own societies more resilient, it can look again at structures and processes for de-escalating the confrontation with Russia, when and if the Kremlin decides that the cost of constant conflict is too high to sustain. Something like the OSCE may eventually be required as a forum for managing a long-term stand-off between Russia and most of the rest of Europe – though ideally it should be an organisation less liable to be paralysed by a single country's veto, and should create legally binding obligations for its members. The Helsinki Final Act's 'principles guiding relations between participating states' include the sovereign equality of states, their right to join alliances or remain neutral, their commitment to refrain from using force or violating the territorial integrity of other participating states, and their pledge to respect human rights and fundamental freedoms. These principles are a useful minimum set of standards for states to abide by. Military confidence- and security-building measures such as prior notification of large-scale exercises and invitations to other states to observe them will also have a part to play in reducing tension. The Council of Europe, and the European Convention on Human Rights, with the European Court for Human Rights to enforce it, should continue to be responsible for ensuring that states treat their inhabitants fairly and respect their rights – a vital issue not just for the individuals concerned, but for creating and maintaining trust between states.

A full resolution of incompatible visions of Europe's future will remain elusive, however. It is hard to see Western Europeans giving up the goal of living in a continent of democratic states that freely choose to integrate (or not) into a political and economic union and a defence alliance. Equally, Putin and his successors are unlikely to give up the idea of dividing Europe into spheres of influence, with Moscow dominating Eastern Europe and strictly limiting the choices of what it sees as subordinate but potentially hostile states.

There is a long-standing Russian perception, shared by Putin, that Russia is always a 'besieged fortress'.⁵⁹ But the logic of living perpetually under siege is that when one neighbour has been subdued, the next becomes the enemy. As long as the Kremlin perceives its former Soviet neighbours, and especially Ukraine, as doomed to be either vassals or enemies (in the words of the famous American sovietologist George Kennan), it is hard to see how the rest of Europe can do anything but defend those states, and itself, against Russia.

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⁵⁹ See, for example, Andrei Kolesnikov, 'Russian ideology after Crimea', Moscow Carnegie Center, September 2015.

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