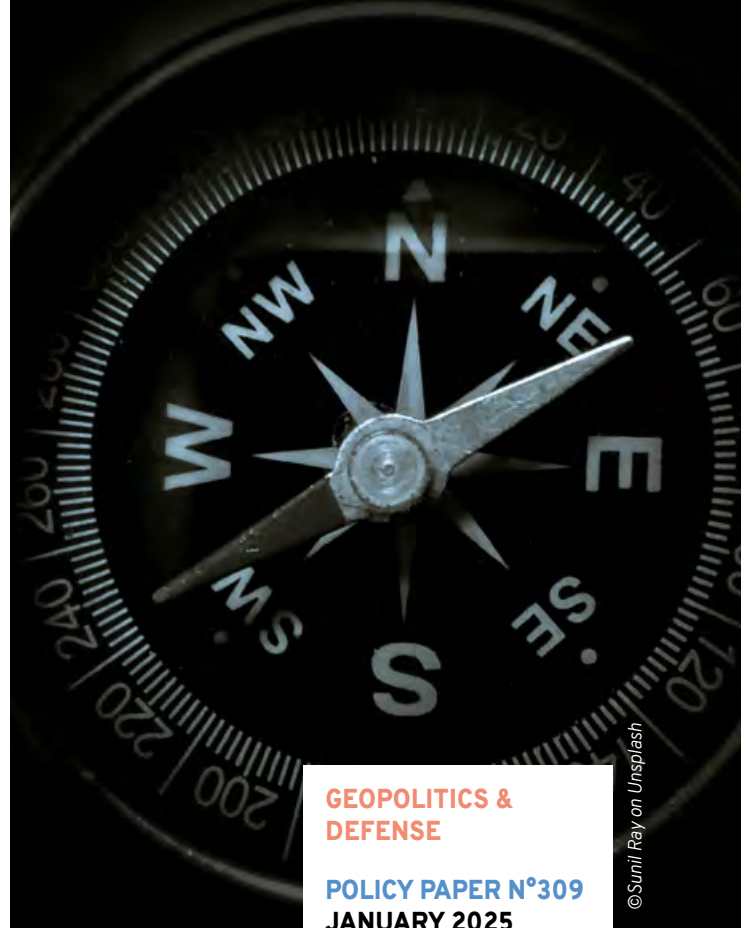


Europe and Ukraine: regaining the initiative

*This article is the first in a series of publications by members of the “Geopolitical Reflection Group”, chaired by **Nicole Gnesotto**, Vice-President of the Institut Jacques Delors, whose aim is to provide short analyses and recommendations on the major geopolitical issues facing the Union in the short and longer term.*

2025 could be a pivotal year in the Ukraine conflict. It will force European leaders to make choices. If, as it has repeatedly stated, the European Union intends to play a role in resolving the Ukrainian crisis, it must rely solely on itself to change the current course of events. It is up to Europeans to know what they want, and at the moment it is not clear that they do.

European leaders have extenuating circumstances. The return of war to Europe has upset the very nature of the European project, conceived as the construction of a great economic and political entity in a peaceful environment free from any recourse to force. Russian aggression has changed the situation, and the European institutions are ill-equipped to deal with it. After reacting effectively to the first armed confrontations in February 2022 by providing unstinting assistance to Ukraine, Europe’s commitment has slowly waned. It remains significant, particularly in financial terms, but it has become discouraged. With the passage of time and a conflict that is becoming bogged down, Europe seems to have lost its compass; it is looking for a perspective while struggling to set a goal for the coming months.



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**#Ukraine
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I • The weaknesses of European action

We need to take a clear-sighted look at the impasse that the European Union has reached in its management of the Ukrainian crisis.

- The Europeans had hoped that time would work in their favour. The opposite has happened, with a war of attrition that highlights Russia's strengths: more human resources, industrial mobilisation in war economy mode, the ability to circumvent Western sanctions strengthened by the complicity of the Chinese regime, an effective response to attempts at diplomatic isolation by playing on the indifference of the countries of the Global South to the war in Ukraine.
- A more frequent criticism is that Europe's commitment to Ukraine has lacked resolve. 'Too little, too late' is the refrain heard from all sides. As is often the case, this criticism is exaggerated, because the EU has done a great deal (supplies of military equipment and munitions, training operations, temporary protection arrangements for refugees, macro-financial assistance, humanitarian aid, etc.) and in at least the same scale as its American ally. But this mobilisation often took a long time to put in place because of the usual cumbersome EU procedures and divisions between member states. It ended up giving the impression of a pusillanimous Europe, which unfortunately fuelled the intransigence of a Russian leadership convinced of Europe's weakness.
- Even more fundamentally, this European action gave the impression that it was carried out in the absence of any joint reflection with the Ukrainian leaders on the precise objectives that European leaders were aiming for in order to end the crisis. Did they want the strategic defeat of Russia, as was often said at the start of the conflict, a return to the situation before 24 February 2022, or even to the borders of independence in 1991, or a ceasefire followed by peace negotiations in line with the 2015 Minsk agreements?

Of course, there has been no shortage of statements expressing solidarity with Ukraine and leaving responsibility for ending the conflict to the Kiev authorities alone. But the Union itself has never formulated – publicly or even more discreetly – its own interests, still less its own vision of a possible way out of the crisis. The reasons for this are to be found in the lack of consensus among the member states on such an issue. As usual, aware of such divisions, European leaders have preferred to avoid discussions that cause offence, at the risk of letting the divergences gradually come to light.

European leaders entered this conflict in a remarkable show of solidarity with Ukraine, only to discover that they had no common vision of how to emerge from it, or of the security order that needed to be rebuilt in Europe. It was emotion that prevailed at the time, and it is still largely emotion that is used as a basis for reflection today. But this lack of strategic thinking on the part of the EU cannot continue for too long without damaging its most fundamental security interests.

II • The options available

At present, Europeans are struggling with a strategic imbroglio from which they do not know how to emerge. Their thinking continues to be dominated by the shadow of Donald Trump's return to power. Having failed to seriously anticipate this, EU leaders, haunted by the American President's sweeping remarks, are now wondering how to act in the face of the risk of a US withdrawal from the Ukrainian conflict. An end to American aid would leave Europe alone in the front line in its support for the

Kiev authorities, with the risk that European aid would prove insufficient and lead to Ukraine's military defeat in the short or medium term.

To avoid this prospect, there are three possible options.

- Convincing President Trump to maintain US military support for Ukraine by arguing that a Russian victory would be a major setback for America, no matter how hard he tried to dissociate himself from it. The US president would be seen as a loser, and this failure would be exploited by Russia and China alike to pursue their expansionist aims in Europe and Asia. This argument may have some effect on President Trump, although his ability to convince his Russian counterpart to enter into negotiations on terms favourable to Moscow's interests should not be underestimated. Furthermore, if Donald Trump were to make this concession to the Europeans, it could very probably only be made in return for a greater financial and military commitment from Europe, in particular in the form of even more massive purchases from American military industries.
- This hypothesis could therefore lead Europe to dispense with its efforts to persuade Donald Trump and to decide to make a significant effort of its own to become Ukraine's main, if not exclusive, supplier and to lead that country to victory. However, this second option could very quickly come up against the difficulties that Europe is currently experiencing on the economic front (slower growth), the financial front (budgetary difficulties in many Member States) and the political front (public fatigue, rise of populist parties hostile to the war). It also risks reinforcing the divisions between EU members, who are far from sharing the same views on the need to step up their aid to Ukraine, as we can already see from Victor Orban's and Robert Ficco's trips to Moscow.

Conversely, the desire to support Ukraine at all costs is already leading some European leaders to mobilise without waiting for a hypothetical consensus in affinity groups, such as the meetings between the Nordic countries, Poland and the Baltic states, or those between the countries of the Weimar Triangle, extended to include Italy and the United Kingdom. However useful they may be, these initiatives run the risk of giving the image of a disorderly European action, in the absence of agreed rules for organising this differentiated cooperation. They may also fail to achieve the level of military support needed by the Kiev authorities to turn the situation on the ground in their favour, or to demonstrate a sufficient degree of political commitment to impress Russia and convince it to put an end to the hostilities.

- A third option, less ambitious than the previous one but undoubtedly more realistic, is that of a one-off, serious and intensive financial effort, capable of providing significant military support to Ukraine for a limited period, but sufficient to put it in a more favourable position on the battlefield. The aim would then be to achieve a ceasefire later this year, preceded or followed by peace negotiations.

Can such a scenario lead to a just and lasting peace? The hypothesis is unlikely, since such negotiations would in all likelihood lead to territorial concessions on the part of Ukraine and an ambiguous agreement on the question of its future membership of NATO. The experience of the NATO summit in Bucharest and the Minsk agreements have shown the limits of such settlements, which sow the seeds of new confrontations to come. A peace agreement reached under such conditions is therefore likely to be fragile and subject to challenges from either side. Its real advantage, however, would be to put an end to the fighting, alleviate the suffering of the Ukrainian people and allow the slow reconstruction of the country.

III • The flaws in European strategic thinking

So far, none of these three options has been successful. Donald Trump's intentions with regard to the war in Ukraine remain largely unpredictable, even if his entourage has no hesitation in speaking for him and drawing up plans that sometimes contradict each other. With the exception of the brief three-way meeting organised in Paris in December by President Macron with Donald Trump and Volodymyr Zelensky, and the scattered telephone calls made by certain European leaders, the Europeans prefer to wait and see what the US President can say and do once in office, rather than work together to define their own plan for ending the crisis.

So, between the high option of continuing the conflict until victory is achieved or the more modest option of providing one-off support to achieve a reasonable peace, the EU countries have not really chosen, and the differences in sensitivity and perhaps even interests are becoming increasingly apparent. The northern and eastern Europeans are sticking to a military victory for Ukraine, while the western and southern Europeans are more prepared to envisage negotiations in the near future. Beyond their oft-repeated support for Ukraine's cause, the only common ground between EU members is to repeat that Russia's views cannot prevail. But everyone can see that this incantation lacks an action plan capable of giving it concrete form.

Europeans therefore still need to work together to overcome the shortcomings of the Union's current strategy. Three errors in particular need to be corrected.

- The first is method. Simply waiting for Trump, or even anticipating his possible demands by proposing to meet them without delay, puts Europe in a weak position on two counts: this attitude can only encourage the next American President to redouble his demands; above all, it prevents Europeans from thinking independently about their own interests and the actions needed to defend them.

There is therefore an urgent need for the EU, in close consultation with the authorities in Kiev, to draw up a precise roadmap for a way out of the crisis that is in the interests of both allies, and to give itself the means to implement this plan. This approach implies that, beyond the short term, Europe is capable of drawing up the security order it imagines for the European continent in the longer term. For Europeans, the war in Ukraine has an existential dimension for the future of their security. This is the very reason why they must be involved in the discussions that will have to decide the end of the conflict, and why they must not leave the field to the Americans and Russians alone. It is therefore essential for the Union to adopt a long-term strategy towards Russia, with which, after the war in Ukraine, it will have to find the elements of a policy of equilibrium that will probably be unstable for many years to come. This strategic exercise, which the EU has been unable to carry out for over twenty years, is now more necessary than ever.

- The second mistake is that of an approach that has so far tended too much to shut itself up in denial of reality. Basically, when it comes to Ukraine, Europeans thought they could win the war without having to fight it; now they think they can win the peace without having to build it. A war that was unthinkable just three years ago has given way to an endless conflict that Europe has not given itself the means to bring to an end. Having failed to fully assess all the consequences of the war in progress, Europeans remain on the doorstep of a genuine peace process, one that requires both real firmness in the assistance given to Ukraine and political courage in the search for a diplomatic path likely to lead to negotiations with Russia. Without such efforts, there is a real risk of finding ourselves in the uncomfortable position in which Europe is faced with an impossible choice between an unlikely victory and an unacceptable defeat.

- The final error concerns the objective to be achieved: believing in a possible return to the world of the past, i.e. the world of the Helsinki Accords and peaceful coexistence, runs the risk of misinterpreting the fundamental geopolitical movements that Europe is facing.

The war in Ukraine has several dimensions. First and foremost, it reflects the desire of Russia's leaders to reorganise continental security in Europe in order to give themselves a new strategic depth and push the Western presence, which they see as an existential threat to their own security, far from their borders. This Russian vision of the European security order is not acceptable, but it cannot be ignored. We must therefore respond to it on the basis of demanding discussions in which firmness must go hand in hand with lucidity.

More broadly, the Ukrainian conflict is one of the most radical manifestations of the new power politics that is taking root at the heart of international relations for a long time to come. China's omnipresence in its maritime environment, the new order in the Middle East brought about by the Israeli army and even Donald Trump's most recent declarations about his designs on Greenland, the Panama Canal and Canada all bear witness to this new geopolitical reality, which gives free rein to coercion and the use of the most brutal force.

Finally, the war in Ukraine provides a platform for the more general movement to question the world order as established by the Western nations over the last seventy years, whose values and principles are now being challenged by a growing number of international players. The refusal of the countries of the so-called 'Global South' to take sides in the Ukrainian conflict and their repeated criticism of the 'double standards' practised by Europeans in their condemnation of ongoing wars reflect the broader movement towards the 'de-Westernisation' of global governance, which is gradually gaining ground in the minds and actions of Europe's partners.

IV • The urgent need for a geopolitical Europe...

It is with this new reality in mind that Europe must embark on the development of genuine strategic thinking and action that will faithfully reflect it. To do this, it must bear in mind three considerations:

- It should not be ashamed of the considerable support it has given to Ukraine from the outset of this conflict; but it must be aware that it still has a major effort to make if it wants to help bring it to an end.
- It must recognise that its action in the short term will probably have to be based on flexible cooperation between member countries driven by the same objectives; but this flexibility of action will have to be based on principles and rules which will have to ensure that the European institutions remain on board in these differentiated forms of cooperation.
- Finally, it must embark on a strategic reflection between all the members of the Union about the long-term security of the European continent and its implications for their own defence policy and for their future relations with Russia. The very future of Europe is at stake, and this existential question must now be at the heart of discussions between its leaders.

European leaders must therefore set about devising a common exit strategy without delay, while taking care to protect their own security interests and those of their Ukrainian ally. The times of instability that will dominate the European conti-

ment for many years to come in the face of the Russian threat do not suggest a rapid return to the Helsinki order. But the period of tension that will inevitably follow a peace settlement in Ukraine will be the test of Europe's ability to rise to the rank of geopolitical player it aspires to be.

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