

A man with a plan? Trump's bad deal for Ukraine and European security

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Executive summary

- Trump does not seem to have much of a plan for stopping the war in Ukraine. But the signals being sent by his Administration as to what the parameters of a plan could look like are not encouraging. Defence Secretary Pete Hegseth set out these parameters on 12 February for how the Trump Administration sees an end to the war. These add up to a bad deal for Ukraine and European security.
- If Trump manages to secure a ceasefire - which is not a given – based on these parameters, there is a real risk that it would leave Ukraine highly vulnerable to a renewed attack by Russia and that it would undermine the foundations of Europe's security order. Even engaging with Russia on the basis of these parameters does substantial damage to Western unity and support for Ukraine.
- NATO membership for Ukraine remains the most effective security guarantee for Ukraine. But if this is not on offer, Europe needs to think creatively about various measures to boost deterrence, including sending troops to Ukraine to uphold a ceasefire and other deterrence measures.
- Europe needs to shift into a much more proactive and forward leaning posture, ramp up defence spending, and drastically increase military support to Ukraine. By dedicating more resources and putting more skin in the game, Europe will put Ukraine in a stronger position and put itself in a better position to shape its own future security architecture.

Does Trump have a plan to end the war in Ukraine? This seems to be the question in every chancellery in Europe. The answer is probably no. But US Secretary of Defence, Pete Hegseth, to some extent [answered that question on 12 February](#) when he set out parameters for how the Trump Administration sees an end to the war. The answer was a bad deal for Ukraine and European security. Taken together, they essentially mean the United States disengaging from Ukraine and Europe.

At the core of the Trump Administration's thinking is Ukraine's geopolitical orientation. Trump is negative towards NATO in general and Ukrainian membership of NATO in particular. Hegseth said that NATO membership for Ukraine was not a "realistic outcome of a negotiated settlement." This is a significant concession to Moscow: Russia has long demanded that Kyiv abandon its ambition to join NATO and that the West accept neutrality for Ukraine. This was spelled out in the draft agreements that Moscow proposed in December 2021. Advisers close to Trump have talked about a 20-year moratorium on NATO membership. There are also thoughts of passing legislation in the US Congress on Ukraine's neutrality.

Hegseth also said that "returning to Ukraine's pre-2014 borders is an unrealistic objective," and pursuing this "illusionary goal will only prolong the war and cause more suffering." The question is whether Washington, in its quest to freeze the conflict, will demand that Kyiv accepts the loss of the territories de jure or de facto. Forcing Kyiv to formally recognise these territories as part of Russia would do damage to the foundations of the European security order and set a global precedent that land can be legitimately seized by force. Trump has shown himself to be rather flexible when it comes to respect for territorial integrity – something that Denmark has experienced first hand.

Hegseth also said that a durable peace must include "robust security guarantees" to ensure that the war does not begin again. He excluded US troops being deployed to Ukraine and said that any security guarantee must be backed by capable European and non-European troops. If these troops are deployed as peacekeepers to Ukraine, at any point, they should be deployed as part of a non-NATO mission and not be covered under Article 5, i.e without the United States backstopping deterrence.

Trump has also pushed for elections to be held in Ukraine. Early elections would be a concession to Russia as Moscow has repeatedly questioned President Volodymyr Zelensky's legitimacy and has the stated goal of "de-Nazifying" Ukraine. "De-Nazification" is code for removing Zelensky and installing a president controlled from Moscow. Elections in Ukraine would give Russia the opportunity to manipulate the outcome through hybrid actions, as it tried in Moldova and Romania last year.

In return, Russia would agree to a ceasefire, stop its land offensive and cease missile and drone attacks on Ukraine. A demilitarized zone along the current line in Ukraine would separate forces. Hegseth said that there must be robust international oversight of the line of contact.

Hegseth also said that Europe must pay for the overwhelming share of lethal and non-lethal aid to Ukraine. This means that Europe would take responsibility for the cost of reconstruction and further weapons and ammunition deliveries to Ukraine.

Trump has signalled that he is interested in Ukraine's deposits of so-called rare earth metals. He dispatched his Secretary of the Treasury to Kyiv to present an agreement on US support and rare earth metals. A deal where the US offers weapons or a role in security guarantees in exchange for these desirable minerals is not impossible to imagine. Indeed, this may be Kyiv's strongest card vis-à-vis a highly transactional Trump Administration set on disengaging from Ukraine.

What does Russia want?

A plan based on these elements would be devastating for Ukraine and undermine the foundations of the European security order, in particular if Kyiv is forced into accepting neutrality and formally cede the territories under Russian occupation. Ukraine would be vulnerable to a future Russian invasion, and Moscow would be well-placed to meddle in Ukraine's domestic affairs and take political control of the entire country.

But it is not a given that Putin would agree to a ceasefire even on these premises. The Russian president has not abandoned his "maximalist" goal – to completely subjugate Ukraine. He believes that Russia is winning the war despite the high cost. Putin sees that Russia is slowly but steadily taking more territory and believes that Ukraine is becoming weaker and the West's determination to support the country is in decline, not least with Trump in the White House.

The more territory Russia conquers on the battlefield, the more Moscow's hand is strengthened for a future negotiation. Continuing the war could thus mean an even better deal for Russia in the future.

Russia may also see a ceasefire as something that would give Ukraine a tactical break. It is not only Ukrainians that dislike of the so-called Minsk agreements of 2014 and 2015. In Moscow, many believe that the agreements were a mistake because they gave Ukraine precious time to modernize its armed forces with the help of NATO allies. Russia would like to avoid a repetition of such a scenario. In the end, Ukraine rather than Russia may have more to gain from a ceasefire.

But it is not impossible that Putin would agree to a ceasefire for tactical reasons – in order to consolidate Russia's territorial gains, rearm, and reconstitute its forces in order to attack Ukraine again in a few years, especially if Ukraine has weak security guarantees from its partners. The economic strain caused by the sanctions may also make Moscow see a tactical interest of agreeing to an agreement. Indeed, Putin has been signalling to Trump an openness to negotiations, including it seems in the phone between the two on 12 February.

The biggest risk, however, is that Putin enters into a negotiation, not to reach a ceasefire, but to undermine the unity of the West and to extract concessions from Trump. He has already secured major concessions from Trump with Hegseth's declaration that Ukraine will not become a member of NATO and that US troops will not be deployed to Ukraine to provide security guarantees. A classic Russian negotiation tactic – as seen in the Minsk talks – is to engage in endless negotiations, preferably about meaningless details, in order to distract from the real issue and secure concessions from the opposing side that is often more than willing to compromise in the hope of reaching an agreement (which never comes).

Levers

If Putin rejects a deal, Trump could resort to a number of different levers to pressure Russia. In January, Trump threatened Russia on his own social media platform Truth Social with trade tariffs and sanctions if Putin was not prepared to stop the war. The Trump administration is also planning to pump out more oil and gas, which would put further pressure on Russia. Hegseth pointed to Trump “unleashing American energy production” to drive down energy prices and more effective enforcement of energy sanctions will help bring Russia to the negotiation table.

Another possible point of leverage against Russia is for Trump to step up military support to Ukraine, also in line with his “peace through strength” foreign policy tenet. By changing the balance of power on the battlefield, Trump could try to create conditions for getting Moscow to accept a ceasefire. Interestingly, the flow of American weapons and ammunition to Ukraine has not ceased since Trump became president. However, it may be that Europe will have to pay for future military assistance, including from the United States.

Despite Trump's sceptical stance on NATO membership for Ukraine, there is also leverage here. Trump could threaten Moscow with moving forward on the NATO accession process and issuing an invitation to Ukraine unless Russia agrees to a ceasefire. To a large extent, however, Trump has undermined his own negotiating position vis-à-vis Russia by dismissing the idea of NATO membership for Ukraine. Given Trump's unpredictability, however, his position on NATO could change.

Of course, Trump will no doubt try to strongarm Ukraine and Europe to support his plan. He could use the threat of withdrawing military assistance as a pressure point against Kyiv. He could also leverage the United States' engagement in NATO to put pressure on Europe: accept a deal or the United States withdraws troops from Europe and signals an unwillingness to live up to Article 5. Such a scenario would of course be a gift to Putin as it would undermine the basis of European security.

A key question is what Trump will do if he doesn't succeed in stopping the war. What is his staying power? Does Trump want to avoid at all costs that Ukraine becomes his Afghanistan? Or would he after a failed attempt to get a deal draw the conclusion that it is just too difficult to make peace, and that it's not worth the effort? He could then withdraw completely from Ukraine, blame the war on Biden, and say that it is the task of Europeans to solve the war in Ukraine.

A Russian victory in Ukraine would have devastating consequences for the West. Even if Ukraine is not a member of NATO, a Russian victory would be undermine NATO's credibility. It would show that NATO – and the United States – is not able or willing to defend Europe against Russian aggression. The question is whether Trump cares.

Securing Ukraine

A central issue in the event of a ceasefire is how to ensure that Russia does not attack Ukraine again in the future. What security guarantees can the West offer Kyiv? Since the Trump Administration has excluded NATO membership for Ukraine, something else is needed to deter Russia.

Hegseth has said that robust security guarantees must be backed by European and non-European troops and that US troops would not be deployed to Ukraine. This raises several questions. Firstly, can Europe provide a force large enough and strong enough to deter Russia along the front, which is over 1,000 km long? If non-European troops are part of a peacekeeping force, where would they come from and what would be the legal basis for the mission? A UN Security Council mandate would be problematic since Russia is a permanent member of the Security Council.

Would European and non-European troops be ready to defend Ukraine in the event of a renewed Russian attack? Hegseth has said that if these troops are deployed as peacekeepers to Ukraine they should be deployed as a non-NATO mission and not be covered by Article 5. Would the countries sending troops be ready, without the backing of the United States, to risk a major war with Russia if their troops were attacked?

If they are not ready to fight, then deterrence breaks down. The credibility of European security guarantees depends on whether European forces are able and willing to respond to an attack. In the end, it is doubtful whether deterrence would be effective without significant participation from the United States.

Deterrence is fundamentally a question of psychology. It is a matter of assessments about what the other side is willing and able to do in a given situation. For Ukraine, deterrence will require several mutually reinforcing measures by the West and Ukraine itself that increase the cost of a new Russian attack. It is unlikely that meaningful security guarantees would be agreed with Russia because Moscow would never accept meaningful measures meant to deter it against attacking Ukraine again. Rather, security guarantees would have to be provided and implemented against Russia's will.

Building up Ukraine's military forces and providing them with weapons over time will be an essential part of this deterrence. Kyiv has already concluded bilateral security agreements with around 30 countries to secure military support in the long term. In addition to sending peacekeeping forces, a coalition of the willing could establish a no-fly zone over the Kyiv-controlled parts of Ukraine, deploy a maritime mission in the Black Sea, and agree on sanctions and other countermeasures if Russia attacks Ukraine again.

But do all these measures together constitute sufficient deterrence? In the end, you have to ask the question what really deters a nuclear power like Russia.

A false peace

Most Ukrainians see Russia's war of aggression as existential and believe that a ceasefire would only give Russia the chance to regroup to attack their country again. Formally ceding the occupied territories to Russia would be political suicide in Ukraine, especially without robust security guarantees such as NATO membership. It would also undermine the foundations of the European security order.

Neutrality has proven to be dangerous in the face of Russian revanchism. Russia has demonstrated that there is no security in the grey zone between Russia and NATO. That was the conclusion Finland and Sweden drew in 2022. That is also the reason why the Ukrainians want to be part of NATO – to deter Russia from attacking.

Zelensky has signalled that he would be ready to accept the loss of the occupied territories if Ukraine became a member of NATO and the Kyiv-controlled parts of the country covered by Article 5. This would create space for Kyiv to reconstruct the areas under its control and move forward with the EU accession process. In the end, such a solution would be the most secure, cheapest, and most effective way to secure Ukraine and Europe's future.

The Trump Administration, however, has presented a vision for ending the war that sets up Ukraine and Europe for failure. It would provide Russia with the conditions for attacking Ukraine again in the future, undermining the credibility of NATO, and unravelling the European security order.

Europe needs to shift into a much more proactive and forward leaning posture, ramp up defence spending, and drastically increase military support to Ukraine. By dedicating more resources and putting more skin in the game, Europe will put Ukraine in a stronger position vis-à-vis Russia and the United States. It would also put Europe in a better position to shape its own future security architecture. Not acting now comes with the risk of letting the Trump administration negotiate over the heads of Europeans and Ukrainians about the future of Europe and Ukraine.



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