

Three strategic dilemmas facing Europe in the ongoing US-Russia-Ukraine negotiations

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Executive summary

Europe faces three intertwined dilemmas regarding the US push for peace in the Russo-Ukrainian War. Overcoming them will require the EU and wider Europe to find ways to leverage their position vis-à-vis both Moscow and Washington by communicating their policies and conducting diplomacy in a coherent way. Non-European partners such as Canada, Japan and Australia should be included in the process when a broader coalition is needed.

First, losing the remaining US support for Ukraine would entail risks that would be difficult for Europe to mitigate, most importantly with regard to intelligence sharing and the ability of European countries to purchase US military equipment for Ukraine, especially for air defence.

Second, the current US negotiation strategy of pressuring Ukraine and accommodating Russia is a risk in itself for Europe. An end to the fighting that rewards or even legitimises Russia's aggression would increase the Russian threat to Europe.

Third, Trump's Greenland gambit has added a new set of complications to an already strained transatlantic relationship. The Trump administration could still split Europe by demanding Greenland or other similar concessions as compensation for further support for Ukraine. The Greenland episode has also undermined the credibility of US-backed security guarantees to Ukraine

Introduction

Since the start of the second administration of US President Donald J. Trump in January 2025, Kyiv and its partners within the Coalition of the Willing have found themselves in increasingly stormy geopolitical waters. The actions of Trump and his administration vis-à-vis not only Ukraine, but also other countries around the world – including close allies in NATO – have created a challenging and multilayered transatlantic playing field. Under these novel conditions, implementation of the long-term foreign policy agendas of Ukraine's partners and prudent everyday diplomacy means tough choices between competing political values, ambivalent strategic decisions and fluctuating tactical approaches. As tensions between the United States and its European allies concerning the western response to the Russo-Ukrainian War increase, European policymakers face three dilemmas.

Dilemma 1: The risk of losing US support for Ukraine

On the one hand, despite its accommodating position towards Russia's antagonistic and aggressive behaviour, the United States has to be kept on board the western coalition supporting Ukraine. Thus, European politicians and diplomats must at least appear to support Trump in his approach to the Russo-Ukrainian War, even though the US administration has already cut military assistance to a minimum and often looks more like an apologist for Russia's war than a supporter of Ukraine's self-defence and a just peace.

A further or even complete US withdrawal from collective western support for Kyiv would mean a reduction or end of ongoing intelligence sharing between Ukraine and the United States. In the worst case, the White House could limit sales of critical US arms to European partners, which can currently purchase US equipment – especially for air defence – through NATO's Prioritised Ukraine Requirements List (PURL) initiative. A significant part of the intelligence and material support that the United States is still providing to Kyiv cannot be fully substituted with current European military, intelligence and industrial capacities. Each US limitation on or delay of transfers of data to the Armed Forces of Ukraine or arms sale through the PURL scheme aggravates risks for Ukraine in the ongoing war.

Setbacks on the battlefield, further destruction of Ukraine's energy infrastructure or, in the worst case, a Ukrainian military or political collapse would have far-reaching repercussions for much of Europe. A full loss of US support for Ukraine could also spill over to other sectors of transatlantic cooperation, further souring European public opinion and harming trust within NATO. These and other repercussions of a continuation or escalation of the war would undermine the security not only of Eastern Europe, but of the entire continent.

Dilemma 2: Risks of supporting the US negotiation strategy

On the other hand, the current US administration wants to end the Russo-Ukrainian War not by pressuring Russia, but by accommodating Moscow's demands. In doing so, it is trying to force an unjust peace with debilitating conditions on Ukraine. A ceasefire without securing Ukraine's currently controlled territory and long-term defensibility, and without firm security guarantees from a militarily potent and resolute alliance of pro-Ukrainian states, would generate little trust, be potentially unstable and hinder Ukraine's recovery and EU integration. Such an insecure peace would restrict Ukrainian business activity and foreign direct investment in Ukraine, and thus burden the EU, its member states and other countries in the Coalition of the Willing with financially supporting a permanently underdeveloped, war-stricken and dependent Ukraine.

Even in the case of an initially stable ceasefire, incomplete control by Kyiv of legitimate Ukrainian state territory would be likely to make credible, multilateral, permanent security guarantees for Ukraine difficult if not impossible to implement, as a re-escalation would drag the guarantors into a new Russo-Ukrainian war. Any “deal” that rewards Russia’s violation of international law, moreover, would encourage Moscow to attempt further aggression. It would also free up Russian military and industrial capabilities to be used for operations in other regions of Moscow’s choosing, thereby increasing the Russian threat to Europe.

An end to the fighting that allows Russia to gain from its aggression would strengthen political, economic and intellectual forces across the world that are sympathetic to or aligned with Moscow and which are typically hostile to the EU or/and NATO. Last but not least, unless Ukraine’s security situation is settled firmly and permanently by NATO accession or an equivalent militarily credible solution, Ukrainian membership of the EU is unlikely. The mutual aid provision in the Treaty on European Union’s Article 42.7 would, in its current form, be an insufficient deterrent against re-escalation due to the lack of military structures to back it up.

Dilemma 3: Lessons from the Greenland gambit

Trump’s recent push to annex Greenland has made matters even more complicated for Europe. The European response has remained united, given that Trump’s insistence on acquiring the sovereign territory of a European country crosses too many red lines. The most acute threat seems to have been averted at the January 2026 World Economic Forum in Davos, but Trump’s style suggests that the issue – or something similarly audacious – could return to the agenda. These new transatlantic tensions make the risk of division real not only in the Euro-Atlantic coalition, but also among European countries. For some European countries, including EU member states, choosing a bilateral security partnership with the United States over European unity – which often requires compromises on national interests – might appear a tempting option.

The Greenland example indicates that the Trump administration could try to force Europe to choose between Ukraine and other essential European security interests. For instance, Washington could make Greenland the price for continued air defence and other support for Ukraine. Should the issue reappear on Trump’s agenda, Washington might threaten to end all aid to Kyiv unless European countries pressure Copenhagen to give up Greenland. A similar mechanism could be applied to any other leverage point that the United States has over Europe. This scenario is to an extent mitigated by the fact that the United States has already scaled down its military assistance to Ukraine to a minimum. At the same time, the US administration is increasingly antagonising Europe.

The US administration’s threats against a NATO ally have undermined the credibility of any US “backstop” for a reassurance force or of a supporting US role in a European military deployment to Ukraine following a ceasefire. US-backed security guarantees for Ukraine are also losing credibility as an instrument to end the war. Although Ukraine and Greenland have so far remained separate issues in the transatlantic relationship, there is no guarantee that some linkage between these or similar issues can be avoided. Furthermore, Washington’s threat to use military force against Denmark was in itself a violation of the UN Charter. Trump has created a precedent by suggesting annexation of territory.

Conclusions and policy recommendations

The EU and wider Europe need to take a more resolute approach to the continent's security and to start working on comprehensive European solutions that require little or no US involvement. It is encouraging that concerted European efforts have already succeeded in fending off antagonistic US strategies vis-à-vis Ukraine in 2025 and Denmark in early 2026. Nonetheless, a renewed push for a partial Ukrainian capitulation from the Trump administration appears to be on the way, ahead of the US mid-term elections in the autumn of 2026.

This time, Europe needs to be prepared for the eventuality that simply flattering Trump back into line might not work. Europeans might have to more directly help Ukraine to withstand US pressure and be prepared to stand in open opposition to the Trump administration. This means a willingness and preparedness to accept the possible costs if Trump chooses to threaten retaliation. This implies that Europe should eventually become an active party to the thus far trilateral negotiations between Russia, Ukraine and the United States or that Europe must open an alternative trilateral consultation track between Russia, Ukraine and the EU.

Before it makes sense for Europe to enter current talks or open its own negotiation channel with the Kremlin, however, Moscow must be made genuinely interested in ending the war. A new European strategy should therefore include tougher economic measures on Russia and more military support for Ukraine. The EU must take a leading role as the United States is currently unwilling to exert sufficient pressure on Moscow or to support Ukraine to end the war in a just and sustainable way.

Without substantive changes in the sanctions regime and/or on the battlefield, new negotiation rounds that are joined or led by Europe will be as fruitless as the already year-long US shuttle diplomacy. In addition to increased military aid for Ukraine, using the frozen Russian assets is an obvious move for Europe that should be taken up again within the EU. European countries should also look into speeding up the timeline for ending imports of oil and liquefied natural gas from Russia and make a greater effort to close remaining loopholes in the current sanctions regime.

Generally, the EU should more vigorously start to develop and pursue its own strategy. The United States has already sharply reduced its leverage over both Ukraine and Russia by scaling-down its aid to Ukraine and refusing to pressure Russia in an effective way. As a result, the EU is now in a stronger position to exert influence, given that it is keeping Ukraine financially afloat and the majority of Russia's frozen assets are located in the EU. Europe's growing role needs to be translated into greater assertiveness by the EU, the UK, Norway and their non-European partners within the Coalition of the Willing to determine the course of further western action vis-à-vis Russia.

The most contentious issue is the question of the extent to which Europe is willing or able to act without or even against the United States. Is Europe, in the worst-case scenario, ready to risk losing the United States as a security guarantor, at least in the short term? While the space for constructive relations with the Trump administration is decreasing and accommodating Trump's positions increasingly futile, it may still be possible to mend relations with a future US administration. At the same time, should a temporary transatlantic break-up become reality, it will provide a window of opportunity for Russia to ramp up its aggression in or even beyond Ukraine.

If Europe had to choose between losing Ukraine and losing the United States, the risks attached to both options would be significant. Nonetheless, those risks could and should be mitigated by increasing defence investment, working on digital sovereignty and diversifying trade and strategic partners. It would be a far more catastrophic scenario if a country the size of Ukraine remained permanently unstable in Europe



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