

What is at Stake Now?

21 February 2025

The US administration's attempt to negotiate Ukraine's future directly with Russia, excluding Kyiv, has sent shockwaves across Europe. This commentary highlights what's at stake for Europe by contrasting two scenarios: one where a sovereign and stable Ukraine becomes part of the EU, and another where Russia triumphs in Ukraine and harvests the fruits of its aggression.

What if Ukraine wins?

Ten points on what a Ukraine that is sovereign, stable, and fully integrated into the EU and NATO would mean for Europe.

1. Security

Safeguarding the sovereign right of Ukraine to pursue a European path, despite Russian aims to eliminate Ukraine's independence, would rescue the European security order by upholding its underlying principles. These principles, enshrined in the UN Charter, the Helsinki Final Act and the Paris Charter, are what provide predictability in international relations, protect the sovereignty of all states, and ensure the security of European states.

2. Stability

Securing Ukraine's full integration into the EU and ideally NATO institutions would eliminate grey zones in Europe, thereby preventing Russia from using these areas as arenas for continuing its conventional and hybrid acts of aggression. There is no status quo ante to return to: either the EU exports stability to the east or it imports instability from the east.

3. An end to an aggressive Russia

Positive political change in Russia, as well as in Belarus, largely depends on the failure of Russian military aggression and nuclear blackmail. Effectively putting an end to Russia's expansionist and imperialist ambitions is therefore an investment in the future not only of Ukraine and Europe, but also of Russia.

4. Geopolitical relevance

By delivering on its commitment to Ukraine through the accession process, the EU can show the rest of the world that it has the capacity to act as a geopolitical actor, to project security, stability and prosperity. This would demonstrate European agency and strengthen the EU's credibility and relevance in world affairs, including in its relation to the United States. It would also strengthen the norms-based international order.

5. Enhanced military capabilities

Ukraine has one of Europe's largest, strongest and most experienced armed forces, and its officers and soldiers have direct combat experience, including with NATO-standard weapons, in a war against an aggressor in Europe. Therefore, it would make concrete contributions to the EU's and NATO's common military capabilities. Integrating Ukraine's innovative defence industry with its European counterparts could also provide a much-needed boost to Europe's productivity.

6. Strategic independence and resources

Ukraine has raw materials and minerals that could be included in strategic value chains and industries within Europe. Ukraine could contribute to the EU's energy security and green transition through its natural gas reserves, nuclear power plants, and experience of resisting attacks on critical infrastructure. With Ukraine as a member, the EU would increase its arable land by about one-third. Ukraine's agricultural industry could reduce Europe's dependence on imports of agricultural products and thus strengthen the EU's food security.

7. Prosperity

The recovery and reconstruction of Ukraine in parallel with its EU integration will boost Europe's innovation and productivity. Ukraine has a well-educated, innovative work force and a vibrant IT-sector, that can support digital transformation across Europe. Bringing Ukraine into the EU's single market would constitute a major boost to the EU's economy.

8. Resilience

Ukraine's societal resilience offers important lessons for the EU in terms of crisis management, national unity, agility and economic adaptability. These lessons can help other European countries to better strengthen their own resilience.

9. A re-vitalised European project

Integrating Ukraine into the European project would mark a major milestone in the story of moving towards a Europe that is whole, free and at peace. This would bring stability and security along with hope and a vision of a brighter future to the peoples of Europe. A successful enlargement of the EU to Ukraine will also revitalise the process of EU enlargement and bring new dynamics to the Western Balkans, Europe's unfinished business.

10. Welcome institutional reform

An EU with Ukraine as a member state will necessitate reforms of EU's way of doing business, thus catalysing much needed reforms. This includes institutional adaptations for efficiency in decision-making, reforms of the EU's common agricultural policy and cohesion policy, and strengthened cooperation with the field of security and defence.

What if Russia wins?

Ten points on what a Russia that wins in Ukraine, and harvests fruits of its aggression and nuclear blackmail, would mean for Europe.

1. International law jeopardised

A Russian victory would throw the international system into disarray. International law, the Helsinki Final Act and the international rules-based order would be undermined. In such a world, the believers of might makes right would be unbridled; efforts to temper raw power would have failed. Across the globe, autocrats will be tempted to repeat Putin's successful use of military aggression and nuclear blackmail to achieve political goals.

2. NATO undermined

Even though Ukraine is not a part of NATO, a Russian victory over Ukraine could spell the end of NATO. Its inability and unwillingness to fully support Ukraine would have dire consequences for the credibility of its resolve and deterrence. NATO could be split and paralysed, potentially risking the credibility of the alliance, exacerbated by the retrenchment of the US from Europe.

3. A strengthened antagonistic Russia

Putin's hold on power and his perceived legitimacy would be strengthened among Russian elites as well as among the broader population of Russia. Russia is likely to maintain its aggressive foreign policy as long as Putin remains in power. The challenge that this presents to Europe and the world would increase. Furthermore, Russia would gain access to Ukraine's critical raw materials and energy resources. In combination with lifting or non-implementation of sanctions, this will strengthen Russia's economy, and thus its ability to reconstitute militarily. Control of Ukraine's agricultural sector and export routes would give Moscow even greater leverage in food-insecure countries.

4. A serious, if not fatal blow to the European project

The EU, since its establishment in the 1993 Maastricht Treaty, has effectively been about a Europe whole, free and at peace (and creating prosperity). Allowing Russia to win and failing to enable Ukraine to succeed in its European integration would be a serious blow to the European project. Furthermore, the credibility of Europe would falter in the eyes of the world, with repercussions for Europe's ability to act and attract globally. The EU's economy, trade, competitiveness, and prosperity will be severely hampered – as will European global interests, be they in the Middle East, Africa or the Indo-Pacific. Countries that have been hedging between the West and Russia/China will side with the latter.

5. Continued threats

Russia would be emboldened while Europe would be weakened. Russian hybrid warfare against Europe will continue and possibly intensify. Even if a modus vivendi with the Trump administration is found, Russia sees itself at war with the West, and its ambitions to ensure the stability of its war economy and repressive regime will remain. Russia's military capacity will resurge in a couple of years, and testing NATO's defence resolve and capability will be a tempting prospect. European countries would need to take full responsibility for their own security, especially in a context of sharply decreased US engagement and presence in Europe.

This means that resources will be diverted from less existential policy areas, which may have domestic political and societal implications. Russia will use its toolbox to stoke societal polarisation and weaken political resolve in Europe.

6. Eastern Europe at risk

Having successfully re-established political control over Ukraine, and with resources thereby freed up, Moscow will continue down its list of post-Soviet countries to force these back into Russia's exclusive 'sphere of influence'. One by one, Moldova, Armenia, Georgia risk subjugation. A Russia-dominated, destabilised and corrupt Eastern Europe will have grave and lasting consequences for the EU's security and prosperity, undo decades of European efforts and put the final nail in the coffin for the vision of a Europe 'whole, free and at peace'. This would put neighbouring EU and NATO countries like the Baltic states at risk.

7. Unstable Ukraine

Ukraine (or what remains of it) would be a source of instability at the EU's border. Ukraine will be plagued by domestic political and economic turmoil and strong resentment towards the West. This could lead to the emergence of Russian-controlled or pro-Russian leaders who would pursue a hostile policy towards Europe, similar to what is seen in Georgia. Ukrainian military assets may be turned against the West.

8. Refugees

Millions of Ukrainians would want to leave Ukraine, resulting in unprecedented refugee flows. This is likely to have profound consequences in EU countries, including increased polarisation, far-right populism, and destabilisation. Ukrainians that already reside in the EU would lose all hope of returning to Ukraine.

9. Nuclear proliferation

Non-proliferation of nuclear weapons would falter. More countries around the world will draw the conclusion that nuclear weapons are the only way to ensure security, especially if the US nuclear umbrella is no longer seen as a reliable form of deterrence.

10. Strengthened authoritarian powers

Globally, a Russian victory would be a blow to democracy, human rights and the rule of law. Forces of authoritarianism would gain power at the expense of values such as gender equality, sustainability and multilateralism. Efforts to hold Russia accountable for its war crimes would be questioned, weakening international norms also in this area.

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