

Present at the destruction

Donald Trump's assault on Europe

His invitation to Vladimir Putin to make a deal over Ukraine has thrown the transatlantic alliance into turmoil



Photograph: Reuters

Feb 16th 2025

FOR EUROPE, the shocks came in quick and bewildering succession. First Pete Hegseth, America's defence secretary, told America's allies that his country was no longer the "primary guarantor" of European security. Hours later Donald Trump said he would [open talks with Russia](#) over the head of Ukraine and Europe. Then on February 14th, at the Munich Security Conference, an annual gathering, J.D. Vance, the vice-president (pictured), unleashed a stinging attack on Europe, in effect backing the hard-right [Alternative for Germany](#) (AfD) party, nine days before the [country's election](#). After looking to America as its ally for decades, many leaders and officials wondered whether Europe's security was crumbling in front of their eyes.

Since Russia invaded Ukraine almost three years ago, America has worked according to two principles: that Ukraine's future should be not decided without the involvement of Ukraine; and that America and its Western allies must strive for unity in the face of Vladimir Putin. Leaders at the conference were thunderstruck to see [Mr Trump and his team](#) abandon both so carelessly—and, in so doing, to scrap decades of diplomacy that has underpinned NATO as the most successful military alliance in modern history.

The question is whether what comes next will most resemble a different Munich conference, in 1938, when Neville Chamberlain buckled to the ambitions of Adolf Hitler; Yalta in 1945, when America, Britain and the Soviet Union carved up Europe; or something better. The good news is that Europe and Ukraine still have everything to strive for.

Fears of a Munich-like cave-in to Mr Putin were inflamed by the way that Mr Trump began his bid for [peace in Ukraine](#). The president and his defence secretary offered a blizzard of unilateral concessions to Russia: reciprocal visits to Washington and Moscow, which have not taken place for nearly two decades; a suggestion that Russia should re-join the G7; and a public acknowledgment that Ukraine would not restore its pre-war borders, join NATO or enjoy the alliance's protection for any European peacekeeping forces there.

To add to the injury, when Keith Kellogg, Mr Trump's envoy for Ukraine, was asked whether Europe would have a seat at the negotiating table, he was blunt: "That's not going to happen." Steve Witkoff, another one of Mr Trump's multiplying envoys, drove home that point when he travelled to Saudi Arabia for talks with Russia. He will be joined there by Marco Rubio, the secretary of state. Russia is thought to have circulated a list of draconian demands based on drafts passed to Ukraine in early 2022—which include capping the size of Ukrainian forces and imposing neutrality—and international recognition of the parts of Ukraine that are part-occupied by Russia.

Mr Vance reinforced the sense of abandonment—hostility, even—by seeming to adopt Mr Putin’s critique of Europe. Instead of talking about Ukraine, he devoted his conference address to rebuking Europe over free speech and migration. “The threat that I worry the most about vis-à-vis Europe is not Russia,” he told the audience. “What I worry about is the threat from within.” Mr Vance’s oblique support for the AfD, a party deemed so extreme that part of it is under domestic surveillance, and his decision to meet with the party’s co-leader, was seen as a blatant attack on his German hosts. One prominent German politician summed up the mood of many: “It seems they are out to get us.”

Mr Trump’s aggressive and transactional approach to international relations adds to the fear of abandonment. The president had earlier sent Scott Bessent, his treasury secretary, to Kyiv to demand that Ukraine hand over rights to what the Trump administration says are \$500bn of critical minerals as payment for all the aid America has given in the past. A lot of the minerals are in Russian-held territory, though America is thought to have asked Russia to negotiate over access. Ukraine refused those demands, asking for clarity over what the country would get in return. In Munich American officials at first pressed Ukraine to sign a deal, but later agreed to continue to talk.

As the reality of Mr Trump’s lightning-fast move sank in, some European leaders began to fear that the real comparison for America’s plans might be Yalta, and a new partition of Europe into a Western and Russian sphere of influence. In December 2021, before the war, Mr Putin demanded that NATO in effect abandon its central and eastern European members, by rolling back its troops to the borders that prevailed in 1997. Russia’s formal demands do not currently include these provisions. But many senior Europeans fear that Mr Putin will revive them and that Mr Trump could see them as attractive makeweights in a package deal over Ukraine.

Some American diplomats echo that worry. One risk, says Julie Smith, America’s ambassador to NATO until last month, is that Mr Trump will agree to withdraw the 20,000 American troops Joe Biden sent to Europe after Russia’s invasion of Ukraine in 2022. Those forces, mostly deployed to Poland and Romania, with some rotating into the Baltic states, make up only a fifth of American troops in Europe.

If they pull out now, Ms Smith argues, other European allies, such as Britain, France and Germany, might judge it too risky to maintain their own eight battlegroups that are currently on the eastern flank. Alternatively, if Mr Trump is set on punishing Germany, he could withdraw the 30,000-40,000 troops based there, as he sought to do in his first term. “The lights are blinking red,” she warns.

Many alarmed allies have noted Mr Trump’s recent talk of “denuclearising” with Russia. This might even put at risk the deployment of American tactical nuclear weapons in Europe, which are carried by several European air forces.

One reason European imaginations are running wild is that Mr Trump clearly has no oven-ready peace plan. “The Americans are completely chaotic,” says one insider. Ukraine policy is a cacophony. Mr Kellogg, the president’s notional envoy, who says he is working on “Trump time” for a rapid deal, within 180 days, is talking to Europeans and Ukrainians—but Mr Trump did not include him on a list of the formal negotiating team. Mr Witkoff is handling Russia. Mr Trump’s negotiating group also includes Mr Rubio and John Ratcliffe, the director of the CIA. As a consequence, no one knows who speaks for Mr Trump.

But that chaos also may create an opportunity for Ukraine and its allies to try to influence what happens next. Volodymyr Zelensky, Ukraine’s president, gave an angry and defiant speech in Munich, warning Europeans that they could not rely on America. If Mr Trump is so eager for a deal that he concedes to most of Mr Putin’s demands, Mr Zelensky might prefer to walk away, betting that he could fight on with European help. Likewise, Elina Valtonen, Finland’s foreign minister, told *The Economist* that she had warned America against a “quick and dirty deal which will probably fail anyway, and which will make President Trump look weak”.

Despite their fiery public rhetoric, American officials meeting their European counterparts in private were cordial and constructive. Mr Hegseth reassured his counterparts and NATO allies that America was not planning any immediate changes to America’s military posture in Europe, prompting some sighs of relief. Mr Vance blurred Mr Hegseth’s red lines about NATO membership for Ukraine. Mr Kellogg asked European officials how they would help to secure a peace in Ukraine, building on questionnaires sent to allies. Mr Vance

and Mr Rubio promised that the Trump administration was not after a “fake peace”. Tulsi Gabbard, the director of national intelligence with long-standing pro-Russia views, reassured her fellow spy chiefs by talking warmly about the importance of partnerships. The Americans were in “listening mode”, says one person involved in talks.

For those reasons, many Europeans still believe that they can influence Mr Trump and shape any peace deal. America and Europe still have something to offer each other. If America is not to leave Ukraine defenceless it needs European money and military force. And if Europe is to stand up to protect Ukraine, it needs American help. “Take a deep breath,” advised one European minister.

The question is whether a deal over Ukraine can be done and what it will look like. European intelligence officials from several countries say that Mr Putin is in no mood to compromise and believes that time remains on his side, despite mounting economic problems at home. One possibility, though few Europeans believe it, is that Mr Trump is serious when he cites Ronald Reagan’s mantra of “peace through strength”, and that he is willing—as a G7 statement published on February 15th threatened—to use economic and other levers to force Russia into a compromise.

If a deal is agreed to, the next question is how it will be enforced. One solution would be to build up Ukraine’s armed forces. Mr Zelensky told *The Economist* that he would need to double the size of his army in the absence of NATO-like guarantees. That will require a serious—and expensive—flow of arms and ammunition. Mr Trump might entertain an arms-for-minerals swap, perhaps to demonstrate to his supporters that America was getting something in return for its efforts. European states are also revisiting the idea of seizing \$300bn in frozen Russian assets. France remains opposed to the idea, in part because of the risk of financial blowback, though Friedrich Merz, Olaf Scholz’s presumptive successor as German chancellor after elections, is more open.

Another approach would be a foreign military force in Ukraine. France has proposed a European deployment that would remain well behind the front lines, reassuring Ukraine without necessarily committing itself to join any future fight. American officials are suggesting a different sort of peacekeeping force, including non-European countries such as Brazil or China, that would sit along an eventual ceasefire line as a sort of buffer. Mr Vance is thought to have told Europeans that a European-only force would be less effective at deterring Russia from attacking. Ivan Krastev, a political scientist, jokes that the boundary might be named the “Trump line” to enlist the president’s vanity. However, Russia is opposed to any foreign troop deployment in Ukraine, so Mr Trump would have to coerce Mr Putin.

Yet another worry is the impact on NATO itself. When five NATO allies looked at a deployment, at a meeting at Ramstein air base in January, it became apparent that European land forces would be stretched dangerously thin, creating gaps in NATO’s own defensive lines. It would be a “gift to Putin” if allies were to dilute their presence in front-line states, says a former American official familiar with that planning.

There are also concerns over rules of engagement and escalation. Some officials worried that if Russia attacked Ukrainian forces, any European deployment in Ukraine would then be forced to choose between watching passively or actively attacking Russia in response. That is a dilemma that Mr Putin could exploit.

Whatever the force, there is broad agreement that America would have to provide intelligence, air defence, air cover and other “enablement”—not just for logistical and technical reasons, but to deter Russia from testing the deployment. “If an American backstop is there,” says one European official, “it will trigger force generation by others.” Some influential voices are proposing alternative arrangements, such as an American-led air shield that could protect Ukraine’s skies without requiring many boots on the ground and a naval force to re-open the Black Sea.

However, these are the very same forces that many in the Pentagon believe would be most useful in any future conflict with China in Asia. “We are definitely not at the stage where we would be discussing individual countries’ contributions,” says Ms Valtonen.

That might have to change fast. Emmanuel Macron has called an emergency meeting of selected European leaders, as well as Mark Rutte, the secretary-general of NATO, in Paris to be held on February 17th. The meeting is expected to address how to get Europe a place at the peace-talks table; what Europe could provide for peacekeeping and what it would need to ask the Americans for; and how to finance rearmament. But the political circumstances are not ideal. Germany's election is days away—and it will be followed by months of coalition-building. Mr Macron has latitude in foreign policy, but his ability to spend money is limited by the lack of a stable government. More broadly, European economies are weak and the continent is being left behind by America and China on cutting-edge artificial intelligence. In hushed conversations in corridors and private messages, European political and business leaders in Munich evinced a sense of disorientation and paralysis.

Yet perhaps the crisis may galvanise Europe into action. In Britain there were hints that Keir Starmer, the prime minister, was moving towards a big increase in defence spending, with a target of at least 3% of GDP by the end of the decade. Ursula von der Leyen, the president of the European Commission, has proposed activating an “escape clause” from EU budget rules to allow member states to surge their own defence spending. Mr Scholz supported that proposal and added his own call for a change to Germany's constitutional limit to borrowing, to carve out defence spending.

Even before the turmoil in Munich, NATO allies understood that defence spending would have to rise, probably to above 3% of GDP, if the alliance's war plans were to be credible. Mr Trump's diplomacy in Ukraine adds to the urgency. Whatever happens in the talks, Europe will need to do more. If a deal requires European troop deployments to Ukraine, those commitments, and the need to mobilise new forces to fill the gaps they leave, could be hugely expensive.

However, if Ukraine spurns a bad deal, or if diplomacy collapses and the war continues, then Europe could still be left to pick up a much larger share of the bill for military aid—perhaps the whole tab if Mr Trump washes his hands of the problem. In that case, Europeans might have to choose between increases in spending, seizure of Russian assets or simply watching Ukraine crumble over time. In practice, the sums are large but hardly crippling: \$50bn or so would make up America's shortfall in aid for a year. The problem would be sourcing weapons. Europe might have to buy many from American producers.

The worst case is that Mr Trump starts to withdraw American troops from Europe and perhaps even the nuclear umbrella, or signals that he will not come to NATO's aid if it is attacked by Russia. Such dramatic steps are seen as less likely—at least for the moment. Congress would have to authorise large sums of money to pay for any large-scale troop withdrawals, for instance, and the process would take years.

But it is not as implausible as a few weeks ago. In private, some officials are willing to think aloud as to how they might prepare for such a catastrophe. They could, for instance, accelerate the procurement of long-range missiles to deter Russia, divert arms purchases away from America and deepen nuclear consultations with Britain and France, the continent's two nuclear-armed powers.

The paradox is that, despite these swirling anxieties, Europe and America both need each other. The Europeans are grappling with the fact that their principal security guarantor of 75 years is not just growing more distant, but, in some ways, is actively hostile. They are increasingly hedging against American retrenchment. But that is not something they will seek to bring about, if only for the cost of mounting a European-only defence against Russia, which one insider puts at 5-6% of GDP. The first course of action is, therefore, still to engage with Mr Trump, however madcap and rash his diplomacy.

More importantly, if Mr Trump truly wants a deal that will stick, he will need European aid and, perhaps, troops. And to give Europe the confidence to provide those, he will need to commit America to Europe's security, rather than sign up to a Yalta-like carve-up. Rarely has the Munich conference seen such a frenzy. And yet the haggling, bullying and nail-biting that will determine the future of Ukraine and Europe has only just begun. ■