George Beebe and Glenn Diesen

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Europe Must Face US Consequences if It Blocks a Ukraine Peace Agreement

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Editorial note. *Timestamps, filler words, false starts and repeated formulations have been removed. Recognition errors have been corrected, and sentence structure has been clarified while preserving the speakers' substantive meaning, qualifications and turns.*

Introduction and the state of the war

Glenn Diesen

Welcome back, everyone. We are joined today by George Beebe, who previously served as Director for Russia Analysis at the CIA and is now Director of Grand Strategy at the Quincy Institute. Thank you for coming back on the program. It is always a pleasure.

George Beebe

Thank you.

Glenn Diesen

There have been many developments in what I am not sure whether to call the Ukraine war or the European war. The United States seems determined to restart diplomacy in a US-Russia-Ukraine format. Two Scandinavian leaders have broken with the boycott of diplomacy by calling President Putin, while Ukraine appears to be under severe pressure from Russian strikes. Given these developments, where are we headed? Is the war approaching a negotiated settlement, a strategic defeat for Ukraine, or a more dangerous confrontation between NATO and Russia?

George Beebe

All of those remain possible. The United States is certainly trying to reinvigorate settlement talks, though it is struggling to do so for reasons we can discuss. Ukraine's battlefield situation does not look good. Only a few weeks ago, Western media were advancing the narrative that momentum had shifted toward Ukraine and that Ukraine was winning. Now we are suddenly getting a very different picture. Former Google CEO Eric Schmidt has written about how dire the situation is and how much more the United States and Europe would have to invest in Ukraine's war effort to prevent defeat. Garry Kasparov similarly argued in The Telegraph that Ukraine will lose unless the West is willing to go all out against Russia in Ukraine. These arguments reflect the extent of Ukraine's difficulties.

The greatest problem is not necessarily on the front line, although Russian forces continue to make steady, incremental advances. It is the strategic air campaign. Ukraine has a longstanding manpower problem, but its lack of air defences against Russian missiles, glide bombs and jet-powered drones has become a crisis, particularly as winter approaches. Unless there is rapid progress toward ending the hostilities, Ukraine could face an enormously difficult winter without reliable electricity, heat and probably water. That would be a humanitarian crisis, which is increasing the urgency felt by the Trump administration's negotiators. European governments are seeing essentially the same picture and increasingly recognise that they must become involved in finding a way to end the hostilities, or at least advance some form of ceasefire, so that Ukraine's winter is not as dire as it now appears likely to be.

Glenn Diesen

Especially in Britain, we hear arguments for doubling down - closing the skies or sending troops to Odesa. But these last options for keeping the war going would mean direct war with Russia and risk World War III. There appear to be

only a few choices: accept a painful compromise, go to war with Russia, or, as you suggested, get Ukraine through the winter by pursuing a ceasefire intended to prolong rather than end the war. With those possibilities in mind, what do you make of the planned November talks among the Americans, Russians and Ukrainians? Are they a genuine effort to end the war, or an attempt to persuade Russia to ease the pressure long enough to get Ukraine through the winter?

Diverging expectations in diplomatic talks

George Beebe

The sides have starkly contrasting expectations. Russia has officially said that the talks should address security guarantees for both Russia and Ukraine after the war. That is what Moscow expects the trilateral talks to cover. President Zelensky, by contrast, has said that they will discuss a ceasefire, including an energy ceasefire and a sectoral ceasefire in the Black Sea, as well as security guarantees for Ukraine. Reconciling those agendas will not be easy.

At least in its public rhetoric, the American position has evolved. The United States now says that the agenda must expand to include the European security architecture. This is the first time the US side has acknowledged that the talks must encompass more than a narrow bilateral Russia-Ukraine agenda. A larger issue is at stake. Russia has urged such a discussion for many years, but the United States has previously been unwilling to engage. It is potentially hopeful that Washington now acknowledges the need to do so. It suggests that the United States has accepted part of Russia's conception of these trilateral talks: they must be about more than a temporary ceasefire and more than security guarantees for Ukraine.

The question is whether the United States is actually capable of negotiating this subject. Steve Witkoff and Jared Kushner do not have extensive expertise in European security architecture. Until now, they have tightly controlled talks focused primarily on territorial compromises and economic or commercial arrangements. A broader security negotiation requires the participation of parts of the permanent government that have so far been largely excluded.

The Pentagon must be involved because the talks would concern weapons systems, force postures and notification arrangements. The CIA would have to address verification and monitoring of forces and weapons deployments. The State Department would need to participate at the working level. In other words, the administration would need a functioning interagency process, which has not really existed under Trump.

The administration appears to recognise, accurately in my view, that much of Washington's permanent government does not want to compromise with Russia or discuss European security in this way. Bringing those institutions into the process could introduce officials who oppose the settlement the administration is pursuing. The White House therefore faces a real dilemma: it needs the expertise and participation of agencies with direct responsibilities, but it must prevent opponents of compromise from sabotaging the process. That makes me sceptical about rapid progress. It is positive that the administration says these matters must be discussed, but saying so is not the same as reaching an agreement.

Glenn Diesen

When you say that Russia has raised this for years, we are really going back to the 1990s, when Moscow called for a mutually acceptable post-Cold War security architecture in Europe. The Western response was essentially that Russia was weak and the West could construct whatever Europe it wanted. That policy assumed Russia would remain weak or become weaker. As George Kennan warned in the 1990s, a recovered Russia would eventually push back.

It sometimes seems that we would need to bring American statesmen out of retirement who dealt with European security during that period, because revisiting the bloc system constructed over the past three decades is not easy. Russia's main concern will be that diplomacy is deceptive - intended to get Ukraine through the winter and prolong the war rather than end it. Even if Moscow believes that Washington genuinely wants peace, it will suspect that the

initiative exists only because Russia is winning or Ukraine is losing. It is therefore difficult to imagine Russia reducing military pressure during the talks.

How can that be reconciled with Zelensky's statement that Ukraine will not even discuss neutrality and with European insistence on a ceasefire before broader European security is discussed? Even putting the United States aside, is an agreement possible?

George Beebe

It is possible, but those tensions are real. Russia is not going to take its foot off the accelerator on the battlefield or in the strategic air campaign. Moscow recognises that it has enormous leverage over Ukraine and will not relieve that pressure merely in the hope of obtaining a satisfactory agreement later. At a minimum, we are heading toward a situation in which fighting and talking occur simultaneously. That is not historically unusual. The idea that Russia will accept a temporary ceasefire while peace talks continue is, in my view, a pipe dream.

This will put tremendous pressure on the negotiators and on the Trump administration. Headlines from Ukraine in the coming weeks and months may be ghastly. We are likely to see civilian deaths and a humanitarian crisis involving people who are cold, hungry or fleeing Kyiv. That will not necessarily create political pressure in Washington and Europe to compromise with Russia. It may instead generate demands for forceful action to protect Ukrainians. It will also increase the political cost to Trump of arguing for normalised relations with a country inflicting such damage on Ukrainian civilians and infrastructure.

I do not see a high probability of reaching a compromise early enough to avert that situation in the coming months, though I hope I am wrong. The issues are complex and require considerable technical expertise. I am not sure that the US government is organised to produce the necessary positions, and any American position would then have to be coordinated with European governments that are even less prepared to address these questions. Progress within weeks is not impossible, but it is unlikely.

The complexity of European security architecture

George Beebe

What is possible? Russia plainly wants legally binding assurances that NATO will not continue to expand, rather than political understandings or handshake agreements. After several decades in which Moscow concluded that oral assurances had little value, it will demand a written commitment with the force of law that NATO will not admit Ukraine.

Could the United States make such a commitment? Yes. NATO enlargement requires consensus among all 32 member states. If the United States says that Ukraine's accession will not happen, it will not happen. Washington therefore has the capacity to agree to this. Doing so would be controversial and would expose Trump to intense criticism, because many in Washington remain firmly opposed.

The irony is that the United States has demonstrated since at least 2008 that it is unwilling to go to war with Russia to defend Georgia or Ukraine. If Washington has repeatedly shown that it will not regard an attack on either country as an attack on the United States, why insist on retaining the option of accepting precisely that obligation? Taking it on is not vital to American national security. Indeed, avoiding it is probably vital, because it could mean a devastating war with Russia. Washington has not adequately confronted this contradiction.

A legally binding end to NATO expansion would not by itself end the war. Russia will also seek assurances concerning American and European military forces and infrastructure on Ukrainian territory. It will want a commitment to begin negotiations on wider European security arrangements, including conventional arms control, confidence- and security-building measures, and theatre nuclear weapons. The United States previously negotiated such arrangements with the Soviet Union, and those mechanisms might have complicated or even helped avert the events that culminated in the 2022 invasion.

Such negotiations are possible again, but they will be extraordinarily complicated. New technologies, including drones, must be incorporated. The full process cannot be completed in weeks or months; it will require years. What Washington can do now is make a legally binding commitment to negotiate these issues and put guiding principles and an agenda on paper. If it did that, Russia might have meaningful incentives to show flexibility on territorial questions. Without such a framework, Moscow has every incentive to maintain its hard territorial position.

We cannot resolve European security quickly, but we could agree on binding principles that demonstrate a serious effort to develop arrangements built with Russia rather than against it. Europe will still require a balance of power, but that balance should operate alongside rules that minimise the likelihood of a catastrophic war.

Glenn Diesen

That will be a difficult agreement to secure because it requires explicit and credible security guarantees for Russia. A change in Ukrainian law would not be enough, because it could be reversed within months. Even an American presidential commitment could be disregarded by the next administration, so Moscow will demand very specific and durable agreements.

European governments may find such commitments especially difficult to accept. Once they acknowledge that the conflict is fundamentally about security rather than simply territory, they must also acknowledge that Russia regards NATO expansion as an existential threat. That challenges the prevailing account of the war as purely territorial conquest and imperialism. It would raise questions about whether Western policies over the past 30 years helped provoke the conflict and why diplomacy was boycotted for four and a half years while hundreds of thousands of young men died. Such admissions could end political careers and undermine the legitimacy of parties and governments.

Nor is every European position simply deceptive. Many politicians genuinely believe that Putin is a new Hitler who wants to conquer Europe and restore the Soviet Union. After repeating these ideas among themselves for years, they have come to believe them. An agreement will therefore be difficult and slow. During that time, Russia may devastate Ukraine and seek additional territory, especially territory it believes cannot safely be left under potential NATO control. How do you see this developing?

George Beebe

Active fighting does not have to continue until every European government agrees on a complete new security order. Russia might end hostilities in exchange for several legally binding Western commitments: no further NATO enlargement, no deployment of Western military forces or infrastructure in Ukraine, and binding principles governing negotiations that would begin on a specified future date.

Some of those principles already exist in the Helsinki commitments and the 1990 Charter of Paris for a New Europe. They need not be renegotiated from scratch. The difficulty is that they contain inherent tensions: national self-determination and the inviolability of borders must be reconciled with a state's sovereign right to choose its alliances and with the principle of the indivisibility of security. Diplomacy must determine where the balance lies. Putting those principles on paper and committing to negotiate their reconciliation would be an important step and could give Russia an incentive to end hostilities.

Russia also has independent reasons to end the war. Strategically, the conflict has not been good for Russia. Its relationship with the West has largely disappeared, increasing its dependence on China and reducing its room for geopolitical manoeuvre. Moscow is frustrated that Chinese investment has not produced dynamic growth in Russia. China is using Russia's dependence to drive very hard bargains. The prolonged failure to advance the Power of Siberia 2 gas pipeline illustrates this problem. Russia therefore has an incentive to restore more normal relations with the United States and Europe and escape its current geopolitical corner. That incentive should be used in negotiations.

Territory and Ukraine's future

Glenn Diesen

I agree. Everyone now says that they want peace; the disagreement concerns what peace means. Russia has little room for manoeuvre on the foundations of the European security architecture and Ukrainian neutrality, but it may be more flexible on territory.

George Beebe

Absolutely. Russian officials themselves say that the war is not about acquiring territory and that Russia already has more than enough. But Putin faces a political optics problem: he cannot emerge from a war involving such sacrifice and so many casualties with nothing tangible that can be presented as an achievement. The challenge is to give both Russia and Ukraine a face-saving way forward, allowing each to say that it secured something strategically important.

For Ukraine, the achievement should be clear. It could emerge with a sovereign and viable state. It would lose territory and is not going to recover the areas Russia now occupies, but it could have a realistic path toward political and economic integration with Europe through membership of, or association with, the European Union. That could be very beneficial over time.

If Ukraine fails to seize such an opportunity, it is likely to move toward failed-state conditions. If Russia does not obtain the larger geopolitical settlement it seeks, it will continue to devastate Ukraine. The country will not be reconstructed, its demographic crisis will deepen, European integration will fail, and the resulting instability will become a problem for everyone. Ukraine therefore faces a fundamental choice that must be made soon.

Negotiation format and the need for unity

Glenn Diesen

How would the negotiations actually work? One possibility is for NATO to establish a common position before meeting Russia. That was the formula used in the NATO-Russia Council, and Moscow disliked it because once every NATO government had agreed, there was almost no room to modify the position without returning to seek a new consensus.

The alternative is to negotiate without a common Western position, but European governments would object that division creates weakness. We saw this when the Finnish and Norwegian prime ministers called Putin and Swedish and Danish leaders immediately complained that Europe must stand together. Unity, however, seems possible only around a war policy. A third option would be a great-power agreement between the United States and Russia that is imposed on the Europeans, but that would be denounced as another Yalta and fiercely resisted.

What format could move the process forward? I welcome the decriminalisation of diplomacy and European contacts with Russia, but I also wonder whether some governments merely want a seat at the table so they can act as spoilers.

George Beebe

A single vast conference involving Russia, all NATO states, the remaining non-NATO European states, the United States and Canada would be awkward and extremely slow. Reaching a consensus within NATO would itself be difficult. NATO now has 32 members - twice the number it had at the end of the Cold War - with disparate interests and sharply different perceptions of the Russian threat. Russia will not want to negotiate in a setting that amounts to one or two countries facing 32.

We will probably need a combination of formats. There may have to be a formal plenary process, but behind it there will need to be a variable geometry of negotiations. The United States will have to consult key European states to identify a workable Western position and also negotiate bilaterally with Russia. Everyone must understand that compromise is necessary.

To start the process, the United States and Russia will have to create a moving-train effect. European governments should understand that if they remain on the sidelines or obstruct progress, they may be left at the station. There should be a fear of missing out that encourages them to participate. They must also understand that if they define their role as preventing any compromise, they will have problems not only with Russia but also with the United States.

This will take considerable time. But agreement on the principles governing the negotiations, their agenda and their framework could be reached relatively quickly. If that framework existed, Russia might decide that it must seize the opportunity before it disappears. Moscow does not want to find itself empty-handed if a possible agreement evaporates.

Glenn Diesen

Some Russian demands may appear excessive, but an opening bargaining position is not necessarily the final position. Russia also has a strategic incentive to harden its demands as its battlefield position improves and to impose costs on the West for prolonging the war. That gives the West an incentive to end it. If Russia sees the diplomatic train leaving the station, it might make real concessions, provided they do not undermine the sustainability of the peace. An unconditional ceasefire would not meet that test.

You mentioned that the West is deeply divided and that Washington may have to coerce European governments not to obstruct an agreement. What happens inside the United States? There also appear to be two American camps. The Kellogg camp argues that Ukraine should be used to weaken Russia so that the United States can focus on China. The opposing camp worries that the war is pushing Russia toward China, destroying Ukraine and creating a risk of nuclear war. How is this struggle being resolved if the United States itself cannot act with one voice?

George Beebe

It is extremely complicated, which is one reason for my pessimism. I do not accept the premise that Russia will reject any deal because it intends to conquer the Baltic states and eventually invade Poland and Germany. I regard that analysis as absurd. My concern is the divisions within the United States. They are not limited to differences between the Trump administration and Washington's permanent foreign-policy establishment; they also exist inside the administration.

A recent Atlantic article about the CIA and Trump highlighted practical divisions between officials who want maximal support for Ukraine and maximum damage inflicted on Russia, and those seeking a compromise accompanied by commercial agreements with Russia that might reduce inflationary pressures, including diesel and gasoline prices. These are genuine contradictions within the administration.

Managing them requires a functioning interagency process. The National Security Council and its staff were created for precisely that purpose, but this process is not operating effectively. The administration fears that involving the agencies will allow them to sabotage a deal. Its response has been to exclude them and manage negotiations through a very small circle led by Steve Witkoff and Jared Kushner. I understand the reason, but this approach has reached the limit of what it can accomplish.

Once the administration says, correctly in my view, that broader European security must be negotiated, the tightly controlled approach is no longer viable. It must bring the interagency system to heel and forge a more unified and coherent position. That will be hard. Finding a common European position is difficult, but establishing a unified US government position will also be very difficult.

Final thoughts and the consequences of failure

Glenn Diesen

Political scientists often assume that states are rational, unitary actors capable of speaking with one voice. That is becoming a serious problem not only in the United States but throughout Europe. Even offering Ukraine possible EU membership as an incentive for concessions could deepen European divisions. There are no good solutions anymore;

prolonged wars make every problem worse. Do you have any final thoughts or predictions about where we are headed?

George Beebe

The picture is not very hopeful, but it is not hopeless. A way forward exists, but it will require genuine leadership and statesmanship, qualities that have been in short supply both in the West and, frankly, in Russia over the past several years. All parties must find a way forward that serves their interests. I believe there is a desire for peace on both sides, but the challenges are real, and the level of statesmanship must rise on all sides if an agreement is to be reached.

Glenn Diesen

One brief final question. If diplomacy fails, the Ukrainian army begins to crumble, rear-area logistics fall apart and the state starts to collapse, producing a Russian military victory, what would that mean for European security, including Russia's own security?

George Beebe

I am very sceptical that Russia would then attempt to push farther west militarily. I do not think it has the capability, and it does not want a war with NATO. The idea that Russia is trying to provoke a conflict with Europe is, in my view, wrong.

The more likely outcome is a failed Ukrainian state generating problems both inside and beyond Ukraine. These could include organised crime, radical and uncontrolled militias, and flows of migrants and refugees seeking to escape. Some of those consequences would also damage Russia.

Failure to settle the war would also bode very badly for our ability to manage future European crises. Such crises could arise in the Balkans, Belarus or Kaliningrad, among other places. Eventually, we will have to grasp the nettle and find a way to manage this situation. Failure to reach an acceptable resolution in Ukraine will not make that task easier; it will make it considerably harder.

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