

Downtown Colloquy
Notes for October 7
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On US policy and the war in Ukraine

Putin is entirely in charge in Russia, with mass public support. He really believes Russia is at war with the West and Russia must win, starting with Ukraine. However he does not translate this into apocalyptic policy. He can win in increments as, in his view, he has been and is now doing.

The United States has several options. Each can be argued as best for US interests.¹

1. Support Ukraine with weapons and money and push all NATO and indeed everyone to do the same, “for as long as it takes.” Resist Putin and his “Russian world” ambitions. Do not give in to nuclear threats. Continue to defend the right of Ukraine to sovereignty and defense against aggression.
2. Decide that Ukraine is a faraway war that does not affect any basic US interest. As gracefully as possible, end our aid to Ukraine, but sign no deals. Wind down US sanctions against Russia. Concerning Ukraine and in dealing with Russia, Europe is on its own.
3. Make a direct US-Russia deal mostly on Putin’s terms. Acknowledge Russia’s annexation of four provinces and Crimea. Pledge to “respect Russian security interests” in Ukraine (and beyond?) and to block any NATO Membership Action Plan for Ukraine or Georgia. Agree not to send weapons or provide training.
4. Try to get some sort of cease-fire and deal with it later. Try to re-draw a red line at “Russia must not attack NATO.” Keep sanctions in place. Keep doing this until Putin dies or quits power or the world context changes.

¹ The whole idea of “interests” is hollow. Only by hindsight are “interests” clear, and often not even then. The word has a nice, practical ring but it is usually a cover for political preferences, or ideology, or wishful thinking. What seems an obvious gain for “national interest” on Day X can become an obvious liability, even a disaster, on Day X+500. Example: is sending weapons to Israel in the US “interest”? Claims to measure costs and benefits are also hollow, because they require a decision about what a cost or a benefit is and how to measure it. A classic cost/benefit analysis that measured the wrong thing was the Vietnam war body count.

US grand strategy, into which Ukraine policy should fit

The era of US preeminence is indeed over. The US no longer has sufficient power, authority, or credibility to get the solutions it wants. The multipolar world has arrived. (Examples: Ukraine war, Israel/Palestine and Middle East, Africa debt relief.)

But,

The world is not a division into “autocracies vs democracies” or “peaceful democracies vs aggressive dictatorships” or US and allies vs China and allies or, in the Putin version, the evil decadent West vs “the human majority”. These are all binaries, two opposing sides. Rather, the world is truly multipolar, each country out for itself, with alliances and policies based on interests and transactions. It is more like the old amusement park game of bumper cars than two warring armies.

We have no “grand strategy” for this new world. Whether past “grand strategies” (cold war containment 1947-89; liberal imperialism of the unipolar moment 1989-2008) were good or bad, correct or mistaken, is irrelevant, although some lessons can be learned.

Some basic “grand strategy” possibilities are:

America First, in the better sense of George Washington’s farewell address. Promote US commercial interests, maintain military deterrence, no permanent friends or permanent enemies and no “entangling alliances”, good relations with all without regard to ideology. Bring US soldiers home and shut down the global network of military bases.

Restore world leadership or dominance in industrial base and technology. Re-strengthen the alliances in Europe and in Asia vs Russia and China. Aid democracies and democratic opposition movements.

Dominate a US sphere of Great Power influence in Latin America and the Pacific and declare that zone off limits to other Great Powers. Leave the rest including Europe to China, Russia, India, the EU or whoever else is out there.

Along with minimal deterrence and basic support for the US economy and technology, prioritize commercial investment and scientific and cultural exchanges and humanitarian concerns – medical aid, disaster relief. Push international climate policy. Non-military internationalism.

Russia and China

China and Russia have a “partnership” which Xi Jinping described as “unbreakable friendship.” They do occasional joint military exercises. Russia is now China’s largest oil supplier (sold at a discount) and China provides Russia with technology and imports, some of which are useful for Russia’s military effort. Chinese goods have replaced Western ones in Russian shops. China and Russia have no formal treaty. While Putin and Xi are apparently great personal friends, sharing a worldview and goal of weakening the US, the relationship remains transactional.

The Russian economy is about 1/8th or 1/10th the size of China’s.

Russia has redirected its oil sales from Europe to China and India. Russia’s other exports are grain, to the Middle East and Africa, and weapons. Russian prosperity and Russia’s military spending depend on the world oil price, which is falling (check the gas prices in Maine).

China has not invested heavily in Russian companies.

The Chinese economy has slowed and is in difficulty. China’s population, like Russia’s, will decline rapidly to the end of this century. Xi Jinping has told Chinese youth to “eat bitterness” – prepare for tough economic times – and has doubled down on less efficient state enterprises and more investment in manufacturing for export. It is not clear who will buy the exports. China needs markets and buyers. Russia is actually a small and poor market compared to Southeast Asia, India, Africa, Europe, and the US.

China has pursued a mini-détente with the US for the last two years, backing off from years of belligerent rhetoric and assertions of China’s looming domination. China continues to threaten Taiwan with aircraft and missiles but there are no preparations for an invasion.

Partly because of its support for Russia in Ukraine, but perhaps even more because cheap Chinese imports would hurt European workers and companies, the European leaders have soured on China. The vaunted China-EU investment agreement has been scrapped. The Chinese dream of a Eurasian economic axis from Shanghai to Hamburg and Rotterdam, via the “belt and road” across Eurasia, is dead.

A final aspect which many Americans miss: the Russian Far East was taken from China by one of those 19th century “unequal treaties.” It is fast becoming a Chinese economic zone. Russians are moving out. Mao Zedong’s maps showed it as Chinese territory. Along the border, the Chinese side is new and prosperous and the Russian side is decrepit.

Will Russia become a Chinese economic neocolony? Will China take any serious risks over Ukraine? Will China be happy to see the Ukraine war settled on Russia’s terms? Maybe, no, and yes. As in The Middle East, China waits to pick up the pieces from the war, to its economic and political advantage.

Russia and Europe

Russia's policy has been to divide Europe from the US and Britain (those "Anglo-Saxons"), to divide centrist conservatives from far right challengers within the politics of France, Germany, Italy, and other countries. So far, that policy has had little success. The Putin-loving NATO-sceptic far right has not taken or shared power in Germany or France. The far rights did take power in Italy, and Prime Minister Giorgia Meloni quickly fell into line supporting the EU and NATO and aid to Ukraine.

Germany is the key. The history of the last 150 years in Europe could be written as the history of German-Russian relations. That includes both world wars and the cold war. In the latter part of the cold war, Germany favored "Ostpolitik", a soft or compromise policy toward the Soviet Union and Russia based on economic exchange. This policy had the blessing of the US – the German "good cop" and the US "bad cop" in dealing with the Soviets. The German-Russian relationship remains supremely important. If Germany decides that it will end support for Ukraine and make a deal with Russia (think partition of Poland in the 1790s or the German-Bolshevik treaty in 1918 at Brest-Litovsk or the Hitler-Stalin deal) this would upend the politics and geopolitics of all Europe. The EU might survive with renewed Russian trade, but NATO would be over. A German-Russian deal seems quite possible if Trump is elected in November and decides to end US aid to Ukraine, downgrade NATO and oppose the EU.

If the US retreats from aid to Ukraine, what will the Europeans do? That's a huge question. A German-Russian deal is one possibility. Others are, a renewed pan-European determination to strengthen the EU and resist Russia on its own, without the US and putting NATO in the background. France would lead this effort. A third possibility is weakening of both NATO and the EU, and a return to the every-country-for-itself nationalism of Europe before 1914 and 1939. This is what Putin wants. I think it is unlikely. Political units form and develop loyalties and habits over time and sometimes unnoticed. I think that has happened within Europe. The EU, like NATO, is still expanding. Ukraine and Georgia (at least the people of Georgia) want in to both.

I think one or another of these options is inevitable, because the US will retreat from European politics. We're headed back to our traditional policy of leaving Europe alone, although our government, running on the inertia of post-1945 and post-1989, hasn't realized it yet.

Those most affected are the Baltic countries, the Poles, the Finns, and of course the Ukrainians – all those people between Russia and Germany who always get trampled on, ignored, divided, and often killed. Also the people of Belarus and of Georgia, who want out of any new Russian empire. Poles and Balts don't want the Americans to go home and the Germans to become the leaders in non-Russian eastern Europe. Been there before.

The Global South

Putin has revived Lenin's dream. Lenin expected the communist world revolution to gather up all the oppressed people of "the colonies and semi-colonies" of Asia and Africa to rise up against the "imperialist" West. The Soviet Union pursued that policy of "Third World anti-imperialism" until 1986. It came close to succeeding. Today, Russia claims to be the "military and strategic core" of a "human majority" opposing the West. Russia is in fact a White, culturally European, and quite racist country. "Human majority" is a way to squeeze Russia into the tent with people of color.

The US government was surprised when most of "the global south" refused to condemn Russia's invasion. It shouldn't have been. Biden's efforts to cast the war as "democracy vs autocracy" and to condemn aggression are seen as hypocritical in most parts of the world – the US backed and still backs dictatorships and invades countries when it pleases.² The Russian appeal to West-hating anti-colonialism has lots of sympathetic listeners. But a lot of the "global south" skepticism about defense of Ukraine is self-interested and transactional - cheap Russian oil, please the Chinese creditors, and just stay out of the whole thing. Why get mixed up in European trouble?

Or, if you are a relatively important country, one of the new emerging "multipolar" ones, use the war in Ukraine to leverage your importance. Turkey, India, Saudi Arabia and South Africa went out of their way to show their independence from the US by trading with Russia and abstaining on the UN resolutions condemning the invasion. Saudis and Russians continue to cooperate on the world price of oil. The UAE is the destination of choice for rich Russians who want to continue doing global business. Turks supply drones to Ukraine, broker deals to ship Ukrainian grain out of Odesa, transfer Russian oil, and are the main overland conduit for goods into Russia. India buys cheap oil and Russian military gear even as it deploys warships with the US in anti-China exercises. I think this kind of self-interested national behavior, not "democracy" or Putin's "traditional morality", is the wave of the future.

The Russia-Iran-North Korea-China axis

Russia now buys drones from Iran and munitions from North Korea, which apparently has a huge stock of left-over Soviet gear. The Russian military uses Chinese-made chips and electronics. Is this collaboration a military "axis" of US enemies that will endure?

Putin hopes so. I doubt it. Like China, Iran is in economic difficulty and its government of mullahs is hugely unpopular. In an almost-war with Israel, Iran's attention is elsewhere. Iran

² Trumps rants occasionally about invading Mexico.

is well aware that Putin and Netanyahu of Israel are buddies³ and that Russia has done nothing to hinder Israeli attacks against Iranian facilities in Syria.

I would regard the “axis” as Washington hype until it takes definite form. The key is China – without China a Russia-Iran-North Korea axis is insubstantial. So far, Xi Jinping has not chosen to embrace this “axis”, which would put China firmly in the camp of world bad guys and alienate some very important trading partners such as South Korea, let alone the US and the EU.

What has the US gained or lost in Ukraine?

At first, when Ukraine repelled the attack on Kiev and NATO including the US and Germany rallied to help, the US leading that effort looked good: competent and credible yet slightly restrained against escalation. The US ruled out direct US or NATO participation.

Then the vaunted Ukrainian counteroffensive of summer 2023 failed. It became clear that the US was dragging its feet on supplying key weapons – first F-16s, then HIMARs, now ATACAMs. The Congress refused to vote more aid for several months, and the aid finally voted in April 2024 (by linking it to military aid to Israel) is now reaching its end.

At its meeting of July 2024, NATO said Ukraine was on a “irreversible path” to membership and denied any concrete steps to get there.

Putin’s threats to use nuclear weapons seem to be working. The NYTimes reported that the US intelligence community advised the President not to approve ATCAMs because they might provoke Putin too much. This followed Putin’s threats (see attached article).

I think US credibility as a supporter of Ukraine is now shaky or gone, for better or worse. It could revive, but only with renewed funding from Washington and a clear pro-Ukraine stance from a new President.

US hesitation and vacillation adds to the US reputation as an inconstant friend. It prepares the scene for an anti-US backlash (“stab in the back”) in Ukraine, Poland, and the Baltic States. It convinces Putin that his strategy of conquest by outlasting and dividing the West was and is correct. It may embolden China to act against Taiwan.

As of October 2024 the US apparently has no power or authority to achieve an acceptable (to the US and to Ukrainians) ending to the war. That may be a reflection of changed world power realities, or unnecessary appeasement and weakness. It may be correct policy in the national interest.

³ Netanyahu’s main bloc of voters, for his Likud Party, are Israelis from Russia and the former Soviet Union. Some Russian oligarchs have joint Israeli citizenship.

