

FROM COLD WAR TO HOT PEACE

Russia is benefiting from its new confrontation with the West. But murkier times may lie ahead

BY IAN BREMMER

In the nearly three decades since the collapse of the Soviet Union, Russia's relationship with the West has undergone a dramatic transformation – from establishing economic ties the 1990s to being partners in the wake of 9/11 to once again being adversaries in the post-Bush era. There's plenty of blame to go around, not least the absence of even considering true reconstruction of the former Soviet states after collapse. But many of these shifts have to do with the political trajectory of one Vladimir Putin, who has gone from relative unknown to the longest-serving leader of Russia since Joseph Stalin. And with Putin's announcement earlier this year of forthcoming constitutional changes, he has signaled that he has no intention of relinquishing power when his term ends in 2024, even if he does give up the presidency.

With all that in mind, here are five key trends likely to shape the “hot peace” between Russia and the West in the coming years.

1. Russia will continue to seek tactical wins it can score internationally, enabled by a US pullback from global leadership and inevitable foreign policy missteps taken by the West more generally.

Putin has been quick to take advantage of the US pullback from areas where it once played a dominant role. It has also taken advantage of those cases in which Western powers have not fully committed themselves (e.g., Syria and Libya). This also includes Ukraine, though there the cost to Russia has been higher in lives lost, budget outlays and in terms of sanctions (more on this below).

More generally, Putin has sought opportunities to improve Russia's position in key regions, at limited financial or military costs. In so doing, he has succeeded in raising Russia's profile in the Middle East as a diplomatic broker, and as an intermediary of the war in Syria. Similar moves are being made in parts of sub-Saharan Africa, and with Russian support for Nicolás Maduro in

Venezuela. These have increased Russia's clout on the international stage – not to the level of the United States or China, but to a notable degree nonetheless. This feat is made more impressive by the fact that while the US and China are the two largest economies in the world, Russia ranks 11th, behind countries like Brazil and Canada. Russia will continue looking for such low-risk, high-reward opportunities for intervention. Putin is also primed to take advantage of the continued souring of US-EU relations during the Trump era. Which brings us to...

2. Europe increasingly desires a return to some sense of normalcy. That will be difficult given just how much division there currently is within the EU, Germany's weakening leadership of the EU and, of course, Trump. All of

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which plays into Russia's hands.

Since 2014, Europe has been rigorously debating the proper response to Russian actions in Ukraine and other malign activities in Europe (election interference, targeted or attempted killings of émigrés). There are many states (Hungary, Italy and, most recently, France) that want to forge closer ties with Moscow, while Poland, the Baltic States and the UK have been far more hostile toward a rapprochement. Germany has shown signs of both arguments – German Chancellor Angela Merkel was instrumental in maintaining sanctions against Russia after its land grab in Ukraine, but Germany has also been the lead advocate for the Nord Stream 2 pipeline.

Ultimately, European unity will stick to sanctions, largely because they are tied so closely to the specific goal of ending the war in Eastern Ukraine. Thawing tensions between the EU and Russia will necessarily be a slow process,

even if the current momentum is aimed at normalizing relations with Moscow.

3. Trump really does want to work with Putin, though the US Congress will continue to stymie such efforts on most counts.

Trump's presidency has not produced the direct benefits Russian leaders had obviously hoped for, though Moscow has still managed to capitalize on Trump's foreign policy – cementing its role as intermediary in Syria being the most obvious example. Also noteworthy is the fact that US-China tensions have pushed Moscow and Beijing closer together. Deep-rooted antipathy toward the Russian government remains bipartisan in Congress, and US lawmakers have built up ways to constrain Trump's ability to unilaterally change US policy toward Russia, as demonstrated

by the 2017 Countering America's Adversaries Through Sanctions legislation. Trump can talk about improving the relationship all he wants, but it is hard for him to actually translate that into policy. Take NATO as another example. Both Putin and Trump have reservations about the organization – albeit for much different reasons – but Congress has already made attempts through legislation to limit what Trump can do to undermine the security alliance even further.

Both Trump and Putin have learned the hard way that having strong leader-to-leader relations is far from enough when at least one of those leaders hails from a robust and still-functioning democracy.

4. Russia is struggling with growing challenges at home, but Putin's foreign policy victories are not helping.

Polling in 2019 has shown that the Russian public wants Putin

to focus more on domestic issues, including an economy that is producing growth of only 1 to 2 percent a year. In general, there is limited domestic support for foreign adventures. Signs from the Kremlin suggest it has become more cautious regarding foreign engagements, both in terms of committing formal troops and getting involved in tit-for-tats that do further damage to the investment climate as the US adds more sanctions.

Still, there are limits to the impact of domestic pressures on Russian foreign policy. First, growth is sluggish, but there is macroeconomic stability – the budget has been running surpluses, currency reserves have been replenished in recent years and stand at over \$550 billion, inflation has been under control, and the currency has been fairly stable. In other words, the government does not face an economic emergency, and it is in a better position than in the past to deal with an external shock. Longer term, there are legitimate concerns about stagnant growth, low foreign direct investment and demographic challenges. But the short-term state of affairs is stable enough that Putin feels he can avoid undertaking any major reforms.

Second, public opinion is not the key driver of foreign policy decisions. Putin has prioritized geopolitics over economics, at least when it comes to what he identifies as core interests, and he is not going to change course in response to polls. There are also some foreign policy priorities that will remain important enough for Putin to risk Western punishment, such as maintaining Russian influence in Ukraine and Belarus.

Going forward, the key question will be how Putin transitions his power post-2024. He is establishing a system in which he can remain highly influential even after he (presumably) leaves the presidency that year. How and indeed if he disperses power remains unanswered by the recent changes. But foreign policy and security questions may be among the very last things he is willing to surrender.

5. Russia must increasingly worry about being dominated by China – a reminder that while

Putin is playing the short-term game capably, he's not playing the long-term game nearly as well.

The Russian government does not have an answer for how to fully address the China relationship over the long term. Russia's hopes for China are especially high at the moment – with Western economic links frayed, China is of growing importance as an export market for energy and as an investor in a range of Russian sectors, particularly oil and gas. But the power dynamic is even starker since the days when Putin first steered Russia toward a revisionist foreign policy. The imbalance will grow even stronger as China continues its geopolitical ascent. Russia's approach at present is to accommodate China's growing influence in Central Asia and even in countries like Ukraine and Belarus. China, for its part, is happy to avoid stepping on Russia's toes, even as it becomes more influential in what Russia views as its historic sphere of influence. Over time, that Chinese presence will create tensions with Moscow, and there's only so much Russia will be able to do about that.

In short, Russia will remain an opportunist on the international stage despite the risks of blowback from citizens at home and the West more generally. But a European continent looking to stabilize itself and its greater surroundings will offer Moscow an opportunity to improve relations with a significant part of the West, even as relations between the US and Russia remain chilly. And while the current standoff between the US and China has pushed Moscow and Beijing closer together, Russia should be concerned about the long-term trajectory of that relationship – if Russia isn't careful, its biggest challenger in this era of “hot peace” will be coming from the East rather than the West in just a few short years.

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BY SYLVIE KAUFFMANN

There he goes again. In his speech on nuclear deterrence delivered on Feb. 7, French President Emmanuel Macron followed the traditional line of his country's nuclear doctrine. But this time he gave it a certain European twist, with hopes of opening a strategic dialog among his EU partners: “France's vital interests have now taken on a European dimension,” he said. “Our nuclear forces reinforce, by their very existence, the security of Europe and therefore have a genuinely European dimension.”

Macron is a man on a mission; he's out to convince his fellow European leaders that the EU can, and must, defend its own interests. This mission has proven costly more than once in the past. Last November, less than four weeks before the London summit due to mark NATO's 70th anniversary, the French president's calculated assertion, in an interview with *The Economist*, that “we are experiencing the brain death of NATO” set off diplomatic shockwaves. And that was exactly the intended consequence: “The last thing we wanted was another summit where

leaders would be patting each other on the back while ignoring the real issues,” said one French official.

Yet for all the noise, what most allies considered really offensive was not the “brain dead” accusation but the skepticism the French leader voiced in the same interview about NATO's Article 5. “That was a big shock,” said a senior British official. “It was sending a terrible message to our enemies.” The fact that Macron had unilaterally, in late August, tried to launch a new dialog on European security with Vladimir Putin did not help.

Having launched his hand grenade, Macron then used the NATO summit and Secretary-General Jens Stoltenberg's visit in Paris a few days earlier to repeatedly reassure his allies on France's commitment to NATO and its confidence in Article 5. Russia, he conceded, was definitely “a threat” to its neighbors. French officials pointed out their president's frustration over Syria to explain his outburst: the withdrawal of US forces, abruptly announced in October by US President Donald Trump, had opened the doors to a Turkish offensive in northern Syria. These decisions by two major NATO allies were taken without consultation with other members of the Alliance who, like

Je ne sais quoi

Can the French president convince his EU partners to pursue a new political purpose?



PICTURE: ILLUSTRATION: JOURNAL GLOBE

BY DMITRI TRENIN

US-Russian relations continue to deteriorate. Expectations on both sides are extremely low. Arms control is unraveling fast, with the Trump administration seemingly more likely to let the New START treaty expire within a year than to extend it. Opens Skies may be another agreement that US President Donald Trump would like to discard. The coming US presidential election might well result in new accusations of Russian meddling, which would lead to new sanctions against Russia.

But whatever the outcome, more sanctions are a near certainty. As has been the case for the past six years, the most one can realistically achieve in the foreseeable future is to prevent an inadvertent direct military collision between Russia and the United States. In the absence of meaningful US-Russian dialogue, communication channels between the two countries' top defense and security officers remain the only instruments of keeping the peace between the two adversaries.

Russia's relations with Europe continue to disappoint. Expectations of a breakthrough or at least significant progress on Donbass, which were raised as a result of the Ukrainian presidential and parliamentary elections of 2019, have had to be significantly rolled back. It is possible that the line of contact in Ukraine's east may see a prolonged lull in shelling and shooting, with more civilians freely crossing the line to go about their daily business and prisoners still kept by both sides returning to their families. What also seems probable, however, is a long-term freeze of the political status quo in Donbass.

The Minsk agreement, whose implementation is a sine qua non for the lifting of EU sanctions against Russia, will remain unfulfilled. Moscow's insistence on a special constitutional status for Donetsk and Luhansk remains anathema to Kyiv. The late-December Russian-Ukrainian gas transit agreement, under which Moscow agreed to honor a court decision in favor of Kyiv, has failed to avert the US imposi-

sition of sanctions on companies involved in laying the Nord Stream 2 pipeline across the Baltic Sea. The German government called the US action unacceptable, but the construction has stopped and the completion of the project will be delayed.

Even with the sanctions in place, it appeared at one point that the leading EU member states were poised to initiate a rapprochement with Moscow. French President Emmanuel Macron invited Russian President Vladimir Putin to his summer residence for a wide-ranging private discussion of the relationship. Coming on the eve of the G7 meeting, this sparked a brief debate on the merits of invit-

ing Russia to re-join the group from which it was expelled in 2014. In a subsequent interview with *The Economist*, which caused quite a stir, Macron, while pronouncing NATO "brain-dead," talked of the need to open a dialogue on European security with Moscow. Some in France and Germany voiced concern that isolating Russia would only serve to push it even closer to China, with negative implications for Europe.

These arguments have been less than compelling. The formal cancellation in 2019 of the INF Treaty raises the possibility of a new US-Russian missile stand-off in Europe. Yet, to Moscow's surprise, this worrisome prospect has failed

to stir European governments into action to prevent an additional confrontation. Indeed, European calm has only confirmed the fact that Europe's security on the Western side is fully managed by NATO. French leaders can make statements, but little more, particularly when their views are not even supported by France's closest partner, Germany, which remains steadfast in its Atlanticism. Chancellor Angela Merkel recently made a rare visit to Moscow, but only to discuss Libya's security, not Europe's, with Putin.

The coming 75th anniversary of the victory over Nazi Germany in World War II has opened a new front in European-Russian rela-

tions. Moscow angrily rejects the notion, contained in the European Parliament's resolution, of the joint responsibility of the two totalitarian regimes, Hitler's Nazism and Stalin's Soviet Bolshevism, for the outbreak of World War II. Victory in the Great Patriotic War of 1941-1945 is key to both the official and popular Russian historical narrative as well as the country's very self-image; any attempt to undermine it is widely regarded as a vicious case of Russophobia.

Against this background, Moscow's relations with – and public attitudes toward – a number of Eastern European countries, from Poland to the Baltic States to Ukraine, have reached new lows.

Looking ahead, Russian-Western relations are unlikely to improve in the next few years. If history is any guide, US sanctions, enshrined in law, will outlive most of today's politicians. There are limits to the daylight that can be allowed to emerge between US and EU policies on Russia. As for Moscow, while the cost of adversity is considerable, Russia's resources are not exhausted. Putin's position remains more or less solid, so strategic concessions are out of the question. The past six years have proven that the Kremlin's foreign policy will not change under Western pressure.

Even as the Russian president has now launched a long process of political transition, it has become clear that while Russians will vote for a different head of state in 2024, the new governance structure and the personalities filling it will be Putin's choices. It is widely accepted that Putin himself will likely act as the country's top authority for years after 2024.

The bad news is that the Moscow-Washington confrontation will continue; the good news is that there will be some guardrails built around it. Russia's relations with European countries will vary from the pragmatic, such as with France, Germany and Italy, to the highly toxic, such as with several Eastern European neighbors. The conflict in Donbass is unlikely to rekindle or escalate, but nor will it be solved anytime soon. Crimea will stay Russian, but will not be internationally recognized as such. There will be no hostilities in the Baltic Sea area, but hostility on both sides of the NATO-Russian divide will become more deeply entrenched. The Arctic will become busier commercially, but more militarized as well. The Balkans, while no longer an East-West battleground, will be a sandbox for small-time geopolitical games. The Eastern Mediterranean, however, is emerging as an area where Russia, again, is competing with the West.

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Vodka on the rocks

Russia's relations with the West are not about to get any better

France, were involved in the fight against Islamic State (IS) in the area and were exposed to the fallout of Trump's decision.

This episode was typical of Macron: take advantage of a major disruption to add another layer of disruption in order to "shift the parameters," as one of his advisers puts it. In this case, most NATO allies admitted that, despite its strength and activity as a military organization, the Alliance itself, as a political umbrella, was in trouble. "Macron has opened a strategic conversation at a political level, and this is important," a NATO official acknowledged. But there was collateral damage. Questioning NATO's relevance increased suspicions surrounding his push for European defense among France's partners. Yet the French are now convinced that they are making inroads. As long as they avoid the words "strategic autonomy," they feel that the concept itself is gaining traction as their European partners finally take stock of Trump's contempt for global rules and of his chances for re-election.

What does Macron want – apart from disruption? His long speeches, press conferences and interviews all point to a clear vision of a world where great-power competition

has returned, presenting Europe with a drastic choice: prey or power. The changing trans-Atlantic relationship was identified early on as a long-term, fundamental challenge: "For the first time," Macron says, "we have an American president who does not share the idea of the European project." And

All the tools of soft, smart and hard power should be used. As the US multiplies its threats of tariffs, trade becomes a major instrument of foreign policy. Trying to save the Joint Comprehensive Plan of Action nuclear deal with Iran was seen as a European effort. Building up European defense is an obvious

the creation of a new Directorate-General for Defence Industry and Space, which, under the control of European Commissioner for Internal Market and Services Thierry Breton, will manage the European Defence Fund.

Early on, though, the French president's crusade for a stronger Europe was met with inevitable suspicion. Call it "Gallic prejudice" or the "Gaullist edge" – what he wants, it is feared, is a French Europe serving France's interests.

Macron's style and method feed this suspicion. His unabashed tendency to act unilaterally in order to strengthen a multilateral organization irritates his European partners – not least the closest of them, Germany. "This is what leadership means," says one source at the Elysée. "Either you are a leader or you are not. He is." But others argue, notably in Brussels, that leadership also means building up support behind you. His Russian initiative is a case in point. By deliberately omitting Berlin – where it would have encountered little opposition – he fed accusations of selling out to Russia from angry Northern and Central European member states. Ambassador Pierre Vimont, a smooth operator well liked in European circles, was belat-

edly dispatched to mend fences and brief wary partners on the Elysée's Putin strategy. Sending him before the announcement of Macron's plan might have helped. The same goes for the controversy over the EU's enlargement process. France produced merely a non-paper in Brussels, with proposals to reform the EU enlargement process, after refusing to open accession talks with North Macedonia and Albania.

The paradox is that with Russia, Macron is probably genuinely convinced that he was acting in Europe's interests. Facing the end of the nuclear arms control agreements, he sees a security vacuum on the horizon and wants European interests to be taken into account, including those of the countries closest to Russia that are not covered by the INF treaty and its range of 500 to 5,500 kilometers. His proposal of a new "architecture of trust and security" remains elusive. Forget about "architecture"; the key words are "trust" and "security." Macron's hope – that there is room for discussion between reluctant European partners and Moscow's divisive efforts – seems to be hitting a wall, as Putin shows no signs of movement despite a few positive steps in the Minsk process

on Ukraine. The Russian president's attention will now likely be focused on the transition process in the Kremlin.

One parameter has been constant in Macron's foreign and security policy: the priority given to the fight against terrorism. Hit by mass terrorism in 2015 and still under active threat, the French generally support maintaining 5,000 French troops in the Sahel, as they have for seven years now, to combat jihad, even at the expense of casualties and even with an increasing feeling that, like Afghanistan, it is a war that may never be won. This is also a crucial element in the complex relationship Paris has with Washington. European support for this combat force will not compensate for the assistance provided by US intelligence and logistics. The French and US militaries have learned to work well together, but every threat of withdrawal tweeted by Trump resonates deeply in Paris – probably more than do his threats of tariffs on French wine.

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The only way for Europe to survive is to think of itself as a global power

now the European project itself is at a crossroads. Having lost its main external enemy with the collapse of communism, the EU has lost its sense of history; it needs a new political purpose. The rise of China is another factor of fragility for Europe, with a risk of bipolarization – a US-China "G2" that, in Macron's view, would deprive the EU of the ability to pursue its own course. The only way for Europe to survive, therefore, is to think of itself as a global power.

priority – and in Macron's thinking, European defense includes a post-Brexit United Kingdom. European defense also includes industry. Paris never misses an opportunity to point out that US pressure for increased defense budgets in Europe goes hand-in-hand with pressure to buy American equipment. "NATO solidarity is Article 5, not Article F-35," French Minister of Defense Florence Parly snapped last year in Washington. Within the EU, Macron has pushed for