

FARCE THEN TRAGEDY: RUSSIAN VIEWS OF THE WEST AND WHAT THEY MEAN FOR UKRAINE

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SUMMARY

- Russia's leaders often claim that the US is a declining power and that a post-American world is growing ever-nearer. They assert that its European allies are bellicose and mercurial, but also fragmented and powerless.
- Where Moscow greeted Trump's first election in 2016 as the emergence of a partner in forging that new order, such hopes have since dissolved. Russia's leaders now largely see him merely as a harbinger of that American decline.
- These factors will shape Vladimir Putin's calculus on Ukraine. Despite sanctions pressures, Russia's president acts as if time is on his country's side. He appears to be trying to lock in its advantage, which bodes poorly for the incoming president's attempts to forge a settlement.
- The near-collapse of the US-Russia arms control system makes talks more difficult, and means any further crises in the relationship could escalate quickly.

The view from the Kremlin

It was about half-way through the press conference when Donald Trump became agitated; cutting off reporters and talking over his co-speaker, Vladimir Putin. “What happened to Hillary Clinton’s emails? 33,000 emails gone, just gone. I think in Russia they wouldn’t be gone so easily.” Even those following the event on Twitter could almost physically sense the horror engulfing the United States officials present. A very public embarrassment was unfolding before their very eyes, and there was nothing they could do to stop it. Fiona Hill, Trump’s Russia adviser at the time, later admitted that she had looked for a fire alarm to pull and considered faking a medical emergency, just to end it.

Karl Marx wrote (citing Hegel) that historical facts and individuals appear “the first time as tragedy, the second time as farce”. One wonders, though, whether the opposite could also be true. The Putin-Trump summit in Helsinki in July 2018 sticks in the memory as the farcical apogee of a wobbly relationship: a rollercoaster of expectations and frustrations, ambitions and setbacks, but all in an often ludicrous atmosphere. Indeed, Trump’s erratic personality likely jolted his partners – including Putin – out of their habitual ways. It made them behave more cautiously and refrain from risk-taking.

Such instances come flooding back now as 20 January 2025, inauguration day, looms closer. But Trump’s second act will take place in a changed world. From China to the Middle East to Ukraine standoffs have intensified, conflicts have widened, and stakes have become more fundamental. Russia is now waging an open large-scale war against Ukraine that will define the future of Europe’s geopolitical order. The continent faces its gravest security challenge since the second world war.

Putin has changed, too. In 2017, the man in the Kremlin was 64 years old. He had already decided that Russia could not reach a consensus with a Western-led world. And he had already annexed Crimea, stumbled into the Donbas, and intervened in Syria. But Russia’s president still had things to gain from deals with the West. He possessed room for manoeuvre; time to wait, see, and react to opportunities as they arise – as is his wont.

Now Putin resembles a man on a mission who – accidentally or knowingly – has burned those remaining bridges. His full-scale war with Ukraine has brought Russia into an all-but-existential collision with the West. Even if Moscow wins the war on the battlefield, to win it politically and enjoy the spoils it needs a diminished West; one that is in no position to treat Russia as a pariah state and prolong sanctions that are now obviously eroding the country’s economy.

Trump has repeatedly said that he wants to facilitate negotiations between Russia and Ukraine that would lead to a ceasefire and end a war that “should never have started”. But Moscow’s reactions to any peace proposals will depend not just on its success on the battlefield and resilience at home, but also – and maybe most importantly – on how it sees the West.

If Russia views the West as a force here to stay, and be reckoned with, well into the future, then it might be inclined to revise its maximalist war aims and seek a settlement palatable to Ukraine and the country’s backers. If, however, it assesses that Western power is declining, then it will see less of a need to embark on compromises that it views as suboptimal. In that case it will have incentives to pursue military victory in Ukraine and expect that a new international order will legitimise its conquests.

Determining what “Russia” thinks is no simple task. Perspectives in Putin’s inner circle are not the same as those of civil servants, business leaders, the Russian military, the Moscow expert class, or Russian voters (let alone liberal Russian thinkers in the West). Putin himself has become more cut-off over time, and his own fundamental views are unknowable. But drawing on official statements, and interviews with Russian thinkers inside and outside the country, it is still possible to discern a broad world view motivating the country’s foreign policies. To understand it, of course, is not to endorse; and significant parts of this view may seem pernicious or delusional when viewed from the West. But grasping its evolution over time, and its main tenets today, is particularly valuable now, as the second Trump presidency approaches. It is a key to whether what began as farce last time will end as tragedy over the next four years and beyond.

This brief seeks to explore that Russian perspective and applies it to the big policy questions of the coming months and years. What can be discerned about how Moscow views the evolution of the Western – and most importantly, the American – place in the world? How does it see Trump’s return to power in that context? And what, therefore, might be its calculations regarding a potential settlement in Ukraine and arms control with the West?

How Russia sees America

From deference to defiance

“The former hegemons, who have been accustomed to ruling the world since colonial times, are increasingly astonished that their commands are no longer heeded,” said Putin in a speech held two days after Trump’s second election win in November 2024. Addressing the

Valdai Discussion Club, an annual Moscow-based global affairs conference, the Russian president continued: “Efforts to cling to their diminishing power through force result only in widespread instability and more tensions, leading to casualties and destruction. However, [...] the march of history cannot be halted.”

This resounding prediction of the decline of American power is the result of a long evolution of Russian views. Over the past 30 years, Moscow’s assessment of the West has swung back and forth; ultimately undergoing a full U-turn.

In the early 1990s the elision of Western values and global power made it difficult for a weakened post-Soviet Russia to contemplate a place outside the *Pax Americana*. Andrey Kozyrev, the country’s then foreign minister, characterised the West and NATO as natural allies and doubted whether Russia had any national interests distinct from them. That claim began to shift as the decade unfolded. Yevgeny Primakov, who succeeded Kozyrev in 1996, sought to form an alliance with India and China to constrain US hegemony; promoting a concept of multipolarity that informs Russia’s foreign policy to this day.

During his first two terms as president, from 2000 to 2008, Putin tried to foster a cooperative relationship with the US. He made a much-publicised phone call to George W Bush after the 11 September terror attacks, and later offered to accommodate the US military in bases in central Asia.

Putin’s speeches over the years indicate a gradual shift to a belief in the West’s weakness and long-term decline. Signs of this came as early as 2007, in his now infamous address to the Munich Security Conference. Widely remembered today as a declaration of political war against the West, it was in fact more of a call for the US and its allies to change their ways. But it included a warning about the inevitable fate of a unipolar system “in which there is one master, one sovereign”. Putin argued that such an order could ultimately bring down the hegemon: “This is pernicious not only for all those within this system, but also for the sovereign itself because it destroys itself from within.”

But by the time of his third term, which began in 2012, Putin had redefined Russia as a politically non-Western country and started cultivating relationships with the non-Western world as ends in themselves, not merely as a secondary priority to relations with the West used as leverage to shape these. “The sharpest contrast in our view of the West was not between Yeltsin and Putin as people think, but between the Putin of the early 2000s and the Putin who returned in 2012,” noted a Russian expert in 2019. [1]

By 2013, Putin had started invoking culture-wars topics to flesh out this theory. He linked the neglect of “traditional values” to the decline of the West: “We can see how many of the euro-

atlantic countries are actually rejecting their roots [...]. They are denying moral principles and all traditional identities: national, cultural, religious and even sexual.” A further dimension that emerged around this time was Putin’s attempts to mobilise what he calls “the global majority” against the West. “In Europe and some other countries so-called multiculturalism is in many respects a transplanted, artificial model that is now being questioned [...] because it is based on paying for the colonial past,” he said in the same speech.

This intertwining of assaults on Western liberalism and on Western credibility in the wider world became more pronounced following Russia’s initial military intervention against Ukraine in 2014. By the early 2020s, Putin was framing the West’s decline as axiomatic. “The western domination of international affairs, which began several centuries ago and, for a short period, was almost absolute in the late 20th century, is giving way to a much more diverse system,” he declared at the Valdai meeting in late 2021. “These changes are gaining momentum, and they certainly cannot be stopped because they are objective as a rule.” Four months later, he launched his full-scale invasion of Ukraine.

Imagining a late-Soviet America

Around this time a revealing parallel also became more prominent: between a supposedly late-stage imperial US and the Soviet Union. Russia’s president frequently evoked the idea of the Bolsheviks as the destroyers of the Russian empire, and incorporated this into his criticisms of a supposedly woke West today. Citing the latter’s alleged extreme cultural liberalism, he argued that: “Russia has been there already. [The Bolsheviks] also said that they would change existing ways and customs, not just political and economic ones, but the very notion of human morality and the foundations of a healthy society.”

Further such parallels, informed or otherwise, pepper public debates in Russia. Igor Istomin, a lecturer at the Moscow State Institute of International Relations, has analysed how the Soviet Union’s ideological purity became a liability: “Back then, the US was ideological internally, proclaiming liberalism and watching out for communists. But externally, it was a pragmatic power cooperating with everyone it had to—from Josef Broz Tito to Augusto Pinochet.” In Istomin’s assessment the Soviet Union, by contrast, had lost out because it advocated ideological purity and pursued ideological goals in a way that rejected or alienated prospective allies. Today, Russia sees itself as the pragmatic one, and the West as the ideological one doomed by its purism.

This perception of a “late-Soviet America” also draws on genuine challenges facing the US: political polarisation, stagnant life expectancy, and crumbling infrastructure. Putin has come to portray American economic dominance as unearned power, a bubble that will have to

burst. According to him, the dollar's role as the world's currency has brought the US unearned and unsustainable prosperity: "US\$10 trillion out of thin air." But he argues that the dollar is in decline and that this will expose the United States' underlying economic weaknesses. "They are facing three deficits: a US\$34 trillion debt, a foreign trade deficit, as well as a budget deficit," said Putin at the 2024 Valdai meeting.

Russian observers draw another parallel between America's policy failures in the Middle East and Afghanistan and the Soviet Union's own military overreach. The chaotic American withdrawal from Kabul in 2021 made this particularly stark. To be sure, some Russian commentators have suggested that US retrenchment will free up resources to focus on its core interests – and that Russia thus needs to watch out. The Kremlin, though, seemingly draws a different conclusion, becoming convinced that America is weak and lacks will.

Now Russia's own involvement in Syria has suffered the fate of US involvement in Afghanistan; with relatively quick military success and a seemingly viable regime giving way to rapid collapse. But this will not necessarily change Moscow's view of America. Russia's leaders will still be tempted to view the US withdrawal from Afghanistan as an analogue to Soviet withdrawal. Nikolay Patrushev, a long-term Putin ally, has already predicted that the US would collapse in a similar way to the Soviet Union, fragmenting into pieces: "It might separate into north and south," he said in a 2023 interview, fancifully suggesting that the American south might seek to unite with Mexico, reversing the territorial changes of the mid-19th century.

A post-American world

Since the start of its full-scale war against Ukraine, Russia has redoubled its efforts to invest in international organisations that work around the West. Primarily this is a function of necessity. Faced with Western sanctions, Russia desperately needs new trading partnerships and ways to evade Western banks and the dollar. At the BRICS summit in October 2024 in Kazan, Russia made an alternative financial order a major agenda item, with three main aspirations: a new cross-border payment system, new securities settlement and depositary services, and a new reinsurance system. None of these priorities made much progress at the summit.

Yet such gatherings and discussions still contribute to Russian claims that the international order is turning against the West. Kazan brought some progress on fostering bilateral trade links. And the Russian media hailed the array of major non-Western leaders defying the West to attend the summit; with India's prime minister and South Africa's president conspicuously doing so instead of going to a Commonwealth summit that took place at the same time.

Putin believes that the future belongs to this circle of countries. "The global West does not exist, and it is becoming less and less global, because its share in global GDP never stops shrinking. As opposed to that, the share of the global south and east continues to grow," he said at an investment forum in early December. "He has made himself firmly believe that the time of the West is over," adds a Russian expert. [2]

The role of Trump

Probably the greatest illustration of a coming "post-American world" in Russian eyes is to be found at the heart of the American system itself: its election twice-over now of Trump as a post-cold war president. Russia's leaders hailed Trump as ushering in a new "paradigm" for US power, shorn of old ambitions to transform the rest of the world in accordance with American values (and thus to democratise their country).

But there are revealing differences between the Russian reactions to Trump's first and second wins. In 2016 the State Duma, Russia's rubber-stamp parliament, opened champagne to celebrate. Hopes ran high in Moscow that the stand-off with the West that had followed Russia's annexation of Crimea could be overcome, and that America would finally agree to treat Russia as a great power with the right to impose its will beyond its borders. "In Crimea, Russia challenged not the US, but the US-led order," said one Russian americanist in an interview in late 2016. [3] "If Trump does not care about that order, then we can get along, because with America as such we have no quarrels."

In 2024, by contrast, Moscow received the news of Trump's victory in a tight-lipped manner, and with mixed signals. Putin's spokesman said that Russia's president had no intention of congratulating Trump, as America is "an unfriendly country that is both directly and indirectly involved in the war against our state." He then denied that a phone call between Putin and Trump had taken place. Meanwhile Russian state television aired nude photos of Melania Trump.

Russia's expert class no longer expects a deal that would be a breakthrough in relations with the US. Its assumption is rather that even though Trump might be ready to discuss Ukraine, he will not – by virtue of his character and the state of the world – be in a position to offer

Russia a different sort of sustainable relationship with the US. In Russian eyes, then, Trump has gone from being a prospective partner to Putin in a post-American world to a relatively intractable counterpart who is also a harbinger and accelerant of the country's decline. Henry Kissinger saw Trump as “one of those figures in history who appears from time to time to mark the end of an era and to force it to give up its old pretences”. That quote captures something, too, of how Russia now views the returning president. Seen from Moscow, Trump is now returning to finish the job that was left unfinished after his first term: of wrecking the Western liberal consensus and confirming America's diminished status in the world.

How Russia sees Europe (and what it says about its view of America)

In many ways, Moscow views Europe as sharing America's perceived fate: arrogant former colonial powers, overly ideological, and firmly part of a West whose time is over. But Europe is harder for Moscow to understand than the US.

Traditionally, Russia's foreign policy expertise has focused overwhelmingly on geopolitics and great power relationships. But this is a poor basis to understand the workings of the European Union: its pooled sovereignty; its muddled compromises; its surprisingly resilient action in moments of crisis; its entanglement of horizontal links that incentivise cooperation and blunt hardliners on both the political right and left. Among Russia's expert class, some have developed a good feeling about the EU. But they are far too few to influence mainstream discussions.

The mainstream Russian analysis of Europe struggles to distinguish between one-off events and trends. It fails to understand how European countries' differences in some areas are offset by the need to cooperate on others. And it tends to extrapolate negative trends into dominant ones. For example, after the Brexit vote in June 2016, Moscow was abuzz with speculation about a domino reaction leading to the EU's collapse. It took deputy minister of foreign affairs Alexey Meshkov to explain (at an expert seminar) that the EU had taken long time to grow and would not collapse overnight, even if the UK—always distinctly ambivalent about membership—had chosen to exit.

Moreover, Russia's elite nurtures a number of misconceptions about Europe – some almost entertaining. A good example is Moscow's view of Europe's much-discussed quest for 'strategic autonomy'. As one Russian expert put it in late 2018, some in the country's establishment believe that strategic autonomy means “two armies against us: that of NATO and that of Europe”; whereas others think “that this must lead Europeans to kick out the

Americans and align themselves with Russia.” [4]

The notion that Europe’s misgivings about Russia are a result of US pressure and a truly sovereign Europe would mean a Kremlin-friendly Europe is deep-rooted in Moscow. Russia-critical statements from Europe have normally been explained away as pressure from Washington, the bad influence of “Russo-phobic” former eastern bloc states, or appeasement of domestic “woke” constituencies.

Many in Russia expect that Europe, and Germany in particular, will eventually change its tune. Witness Putin recalling Helmut Kohl telling him that Europe’s civilisational future depended on its alliance with Russia; or speaking respectfully about Gerhard Schröder’s policy towards Russia as chancellor. The president seems convinced that alienation from Russia has done Germany a disservice. “The European economy, including Germany’s, which was designed to rely on our energy resources, is undergoing very serious trials. [...] What stops the German government from pressing the button, coming to terms with us, and turning [gas imports] on?” he said at a recent news conference.

Moscow has thus over-estimated Germany’s narrow focus on its own immediate economic interests. A Russian expert in foreign policy, Andrey Kortunov, has pointed to the overwhelmingly economics-focused education and often slightly Marxist worldviews of the Soviet and early post-Soviet Russian political class. They believed in the primacy of economic relationships, which led them to underestimate the political consequences of actions such as the annexation of Crimea and persecution of Alexey Navalny. They did not anticipate how a pile-up of such incidents would ultimately wear down Berlin’s trust and willingness to invest in the relationship.

Occasionally, Russian analysts as well as politicians claim to miss Europe as a political actor capable of mediating the harsh stand-off between Moscow and Washington. Europe “ceased to exist as an independent centre, an independent political and sovereign centre of international politics,” Putin lamented recently, adding, though, that “I hope this will go away at some point, and we will restore our relations with individual European countries and, more broadly, with the EU.”

The assumption is that if the EU were led by real Europeans – as opposed to ‘globalist’ elites doing America’s bidding – then relations between Europe and Russia would be fine. Moscow has invested in relationships with far-right and other fringe forces in Europe, seeing their divergence from the Western liberal consensus as proof that they are more genuine representatives of true feelings in Europe. “Euro-sceptic and traditionalist movements have an influence on the overall atmosphere in Europe,” two prominent Russian experts noted in

2017, “but they lack the potential, primarily the intellectual one, needed for devising ... an alternative political and economic model.”

Still, the current phase of the war in Ukraine, and Europe’s frantic discussions on how to hold up assistance to Kyiv with less America, seem to be changing some perceptions in Moscow. Europe’s normative DNA has become more manifest. Russian observers have noted that some European positions on the war and any settlement are currently more hawkish than those of the US establishment. Not only is Europe more concerned with the normative side of the war – the idea that Russia has violated norms and this should not remain unpunished – but it is also ready to take practical measures to help Ukraine boost its security in case there is a peace deal.

“I feel very anxious about Europe – I fear that they may end up being a factor that will push us into a full-blown crisis,” said Istomin in a recent podcast. According to him, fears of abandonment by Trump’s US incentivises Europe to provoke conflict with Russia sooner rather than later. “We have been thinking that it is America that is pushing Europe into conflict with Russia,” he added: “In fact, there are many influential actors in Europe who are perfectly capable of doing that all on their own.”

“For a long time we assumed that the US keeps its boot on Europe’s throat and does not allow Europe to conduct relations with Russia according to its interests,” echoed Fyodor Lukyanov, one of Russia’s most prominent foreign-policy experts. “It turns out there was no boot there at all.” In such framings, Europe’s position towards Russia, shaped by a mix of fear and arrogance, could lead the continent into even deeper crises. “Europe continues moving along its chosen path, completely ignoring its own diminishing might and changes in the surrounding environment,” writes another Russian expert, Timofey Bordachev.

The policy implications of Russian views of the West

A declining and prickly America, a fragmented and mercurial Europe – if these constitute the West as seen through Russian eyes, what decisions is it likely to base on those judgments? While it is hard to draw a direct line from that outlook to firm predictions, it does not bode well for the two most sensitive topics on the eve of the second Trump presidency: arms control talks and, in particular, Ukraine.

Ukraine: Betting on time and Trumpian turmoil

Long before the US presidential election, Trump repeatedly claimed that should he win, he would end the war in Ukraine in 24 hours. Now his incoming administration is weighing the

potential paths to a ceasefire.

Options could include a freeze of the conflict, demilitarised zones, Ukraine committing to stay neutral, or alternatively Ukraine agreeing to lose of some territory in exchange for membership in NATO. Trump might halt military aid to Ukraine to press it to negotiate, or keep or even increase it in an attempt to force Russia to negotiate – and to ensure Ukraine negotiates from a position of strength. While the overall strategy was not yet clear at the time of writing, these ideas all fell far short of what the Kremlin had indicated it would accept.

Russia's whole full-scale invasion has been consistent with its view of the decline of the West. Putin likely launched it under the assumption that Ukraine would fold fast and that its allies would lack the will or ability to prop it up militarily, and thus prevent the imposition of a Moscow-friendly puppet government. He did not seem to expect decisive Western action against Russia (otherwise Moscow would have taken care to evacuate its now-frozen central bank reserves). “The thinking was that the West would react the way they reacted to annexation of Crimea – impose a few sanctions, but overall, things would continue the old way,” said a Russian expert reflecting on February 2022. [5]

But even now, after over 1,000 days in which the West has shown itself more robust in backing Ukraine than even many of its own leaders might have assumed beforehand, Russia once more seems to be working on the assumption that wider global events are in its favour. In the past, Moscow accepted compromises it did not like in order to maintain a cordial relationship with America and ensure Russia's place in a US-led world order. In 1997, for example, it accepted NATO enlargement, signing the NATO-Russia Act. In 2002, it refrained from picking a fight over the alliance's next round of enlargement. But Moscow lacks such motivation now: it sees the Western-led order as collapsing, and with it any need to accommodate Western powers. Instead, this view makes a case for contesting the contours of the future order – on the battlefield as well as diplomatically.

In June 2024 Putin laid out his latest aims in a speech to the senior staff of Russia's foreign ministry. He demanded that Ukrainian troops pull out from all four of the regions “annexed” by Russia in September 2022, and that the country “adopt a neutral, non-aligned status, be nuclear-free, and undergo demilitarisation and denazification” (his code for Ukraine giving up its aspiration to join NATO, and letting Moscow dictate its military weight and posture). Even if they probably include some room for negotiation at the margins, most of these conditions are completely unacceptable to Ukraine.

They are the maximalist demands of a leader who believes that time and geopolitical gravity are on his side; and the adversaries need peace more urgently than he does. In the final part

of the speech, Putin insisted that any agreement with Ukraine should be embedded in the emergent “new system of Eurasian security”, which should result in “bilateral and multilateral guarantees of collective security in Eurasia” that will “gradually phase out the military presence of external powers.”

Even if it was uncertain in February 2022, since then Russia has come to see itself as in conflict not only with Ukraine but also with the West. Alexey Levinson, a Russian sociologist, has explained the thought process: “When Russia invades a neighbouring country, and the West imposes sanctions as punishment, the Russian population then is happy to agree with state propaganda’s thesis that it’s the West that started it as another episode in the Russia-West eternal standoff. The neighbouring country never seems important in itself. It is just another battleground of this great [conflict].”^[6]

Sure enough, for the first six months of the full-scale invasion, Moscow treated it as a “special operation” against a neighbouring country. But when that fell far short of its aims, it was reframed as a “military operation” against a proxy state of the West. That raised the stakes and changed the terms of what would be an acceptable outcome for Moscow. “People here assume that as Ukraine is five times more important to Russia than it is for the US, then also the US should make five times more compromises on settlement than Russia,” a Russian expert said in an interview in November.^[7]

If Russia’s leaders doubt the West’s trajectory, they seem to see Ukraine – as a proxy for the West – as weaker still. Putin frames sovereignty as a capacity that small countries lack: they are inevitably pawns in international politics that can be pushed around by great powers at will. Hence the Russian president’s de facto insistence that the US topple Ukraine’s elected president. “The thinking in Moscow is that if the West gets rid of Zelensky, that is the sign that they are finally ready to start talking seriously,” one Russian expert explained in an interview in July.^[8] “The presidential term of the previously elected head of Ukraine has expired along with his legitimacy, which cannot be reinstated by any tricks, Putin said in June: “Executive power in Ukraine has been usurped and is held illegally.”

In reality, while Ukraine does depend on Western military and economic aid, it has agency and is doing its best to shape the outcomes of any negotiations. It has come up with a peace plan of its own and it is busy with diplomacy, reaching out to international partners including the incoming Trump administration. Zelensky has also indicated his readiness to stop pursuing aims that are currently unrealistic; most notably the military liberation of the territory within its 1991 borders. In late November he suggested that a NATO-membership offer for Ukraine-controlled territory “could end the hot phase of the war”. In short: if Ukraine can provide security for the bulk of its territory, it could refrain for the time being

from attempts to liberate the rest, though it would not cede any of that *de jure*.

Putin's position, if anything, has hardened since he gave his speech in June 2024. Back then, at least some among Russia's expert class were quietly discussing more realistic terms for a settlement.[9] In an interview in summer 2024, one of these people described ideas for a "frozen conflict" that have arisen during such discussions: "Russia could claim that it has liberated the areas where people feel they are Russians [...], but Ukraine would preserve its independence and European orientation." [10] In 2023 and the first half of 2024 so-called "track two" meetings between unofficial US and Russian representatives took place, with the aim of hammering out possible compromises.

In November, though, these same experts acknowledged that they now had little hope for a settlement. They noted that the Kremlin is not desperate for a deal and that while the war might be unsustainable in the longer term, Ukraine's difficulties are more urgent. "The approach is that right now we need to make a maximum effort on the war," said a Moscow economist at an autumn 2024 seminar: "Everything else can be sorted out later." [11] There, too, the belief was implicit that Russia is working with the grain of global events (and perhaps the opportunities presented by a chaotic Trump administration).

Track two meetings have run aground in recent months. And the public debate in Moscow has changed. If earlier in the full-scale war one could often hear Westerners arguing that a premature ceasefire would be dangerous, then the advance of Russian forces in south-eastern Ukraine in recent months has made equivalent arguments ever-louder in Moscow. "The essence of our proposal is not a temporary truce or ceasefire, as the West might prefer, to allow the Kyiv regime to recover, rearm, and prepare for a new offensive," Putin told his diplomats. "I repeat: we are not discussing freezing the conflict, but its definitive resolution."

Arms control: A perilous interregnum

For more than half a century, arms control treaties were a major pillar of the US-Soviet and then US-Russia relationship. But it has fallen away. In 2002, George W Bush announced the United States' withdrawal from the Anti-Ballistic Missile Treaty. Russia suspended its participation in the Treaty on Conventional Armed Forces in Europe in 2015 as the Russia-West rift grew. The US withdrew from the Intermediate-Range Nuclear Forces Treaty in 2019, citing Russia's violation of its terms. With Russia's suspension of the new Strategic Arms Reduction Treaty (START) in 2023, the system of controls has now all-but evaporated.

Strategic arms control used to be a Russian priority, for practical and political reasons. Maintaining a nuclear arsenal is costly. The late-stage Soviet Union and the freshly

independent Russia were severely cash-strapped, so keeping up with the US would have been impossible. But bilateral arms control talks also gave Russia a sense of status. “Russia liked arms control: this is something that great powers do,” says a Russian analyst. [12]

Until the start of the full-scale invasion of Ukraine, Russia remained committed to the START treaty. In 2021, it was extended for another five years without too much fuss. The war, though, changed that. The START now expires in 2026, and the Biden administration’s attempts to discuss a follow-up have met with refusal. Russia has made it clear that it does not intend to compartmentalise: to discuss arms control with the US while Washington is arming Ukraine. “Until Washington revises its extremely hostile anti-Russian course, a conversation with the United States on strategic issues, including nuclear arms control, is meaningless for Russia”, said a Russia foreign-ministry spokesperson in October.

It is unclear whether Trump is interested in the issue, or whether he would persuade Russia to discuss strategic stability without essentially siding with Russia on Ukraine. Furthermore, both countries feel that the old framework no longer corresponds to the new realities. For Russia, the fall of the eastern bloc and the expansion of NATO tilted the balance unacceptably in the West’s favour. For the US, the case for discussing nuclear issues with Russia without also binding in China, with its growing nuclear arsenal, is doubtful.

Where this intersects with Moscow’s expectations of US decline and European ambivalence is the assumption that the world is in a period of transition. In this view the old framework is not fit for purpose, but the new one cannot be agreed before new power relationships, winners and losers, have been established. So global strategic arms control is unlikely to go ahead without China, which, for the time being, remains reluctant. And even bilateral controls are all but impossible while Russia still hopes for outright victory in Ukraine and dreams of a new Yalta.

What the comeback of the Trump-Putin duo means for Europe

On the advent of the second Trump presidency, Moscow does not seem to view the US as a stable great power with predictable behaviour. Yes, expectations of imminent US collapse are confined largely to fringe Russian thinkers (some of whom are nonetheless influential). But the Russian mainstream characterises the US as a power whose global influence is clearly declining, that needs to find its feet in a world that is no longer unipolar, and whose ability to act is undermined by domestic discontent and polarisation.

Furthermore, Russia's own lived experience suggests that a downhill slide from superpower status can be long as well as steep. It may change many of the country's foreign-policy priorities and make old arrangements either obsolete or impossible to keep. Even though Moscow's political class knows that, objectively, today's US is not the same as the Soviet Union of 1990, it will struggle not to draw some parallels.

Seen against that background, a returning Trump resembles a further agent of chaos. Back in 2016, some in Russia's ruling circles may have hoped that he would prove to be a new Franklin Roosevelt – a US president who agrees a new Yalta, a world order based on spheres of influence. Such ideas did not survive contact with reality. At the end of 2024, the expectation is that Trump will prove to be a new Boris Yeltsin: a powerful figure who will dedicate his notable energy to destroying the old system, but will not be able to come up with a new one.

This will have far-reaching implications for Europe. Not only does the idea of a global geopolitical interregnum encourage Moscow's brinkmanship, but it could also give Russia motivation to seek a favourable position from which to start negotiating new agreements once the time for that arrives. If Moscow sees the US as a declining power, and Trump as a destroyer of the old liberal system – but not fit to lay the foundations of a new order – it will most likely expect a period of chaos and change to last for years to come, and act accordingly.

On arms control, this makes it unlikely that Russia will submit to new talks while so much is in flux. On Ukraine, however, talks between Trump and Putin will likely take place. Despite its unenthusiastic welcome for his re-election, Moscow will not want to shun the incoming president completely. It has little to lose from such contacts, and could potentially hope to gain from them. Putin has already admitted that he is open to meetings.

But talks emphatically do not need to mean end to the war. (Russia can keep fighting while it negotiates.) And Moscow knows well how to drag out negotiations and portray its adversary as the guilty party thanks to whom peace cannot be achieved. Witness the discussions on a border treaty with Estonia, which began in 1992 and still have not achieved a ratified deal.

There are several possible outcomes from new Trump-Putin talks:

- A major question is what Trump will do if he sees that it is impossible to reconcile Russia's position with that of Ukraine, and thus conclude a sustainable deal. Optimists in Kyiv and EU capitals may hope that would inspire the president to boost his support to Ukraine.

- More likely, however, based on his past statements and foreign-policy actions, is that Trump would simply turn his attention elsewhere. This would leave the whole situation for Europe to handle, an eventuality for which it is poorly prepared. It would be left with a grim choice between seeing Ukraine lose, or trying to support it, both militarily and financially, without the United States' help.
- Should Putin and Trump manage to agree on a deal that is not acceptable to Kyiv, then the likely outcome might be that Ukraine becomes a failed state: the collapse of central authority in a country with many armed men. Instability and new refugee flows would head towards Europe.
- One can also imagine a fragile deal: a settlement that falls short of Putin's maximalist goals, but that Moscow accepts for tactical reasons, knowing it can resume fighting later. Under this scenario, Europeans may try to set up a tripwire force to prevent Moscow from invading again. But even then, it would be crucial that the US as a NATO ally remain committed to Europe's security more generally. Otherwise Moscow might be tempted to deal a military humiliation to the Europeans, to punish what it characterises as a maximalism not backed up by force.

One way or another, then, Europe is facing its biggest security challenge since the end of the second world war. European policy makers must waste no time in developing a realistic and workable strategy; including ideas on how to change Moscow's calculus to make it seek a sustainable peace and on how to provide support to Ukraine while also boosting their own defences. That would involve some painful trade-offs. But the only alternative is denial.

About the author

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The image for this text was created with the help of Grok, an artificial intelligence platform.

[1] ECFR interview with a Russian Americanist, Moscow, March 2019.

[2] ECFR phone interview with Russian expert, November 2024.

[3] Interview with a Russian Americanist, Moscow, December 2016.

[4] Seminar held under the Chatham House Rule, Moscow, December 2018.

[5] ECFR phone interview, September 2024.

[6] ECFR interview with Levinson in Moscow, November 2021

[7] ECFR phone interview, November 2024.

[8] ECFR interview, third country location, July 2024.

[9] ECFR interview, third country location, July 2024.

[10] ECFR interview, third country location, in July 2024.

[11] Seminar held under the Chatham House Rule, Vienna, October 2024.

[12] ECFR interview in November 2024

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