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June 2025

The Future of NATO

Russian Views on NATO

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The monster of the 21st century. NATO is now a fundamentally anti-Russian alliance¹

Introduction

NATO is no longer merely the “significant other” that has – with varying levels of antagonism – shaped Russia’s self-perception since the collapse of the Soviet Union. Since the start of what the Kremlin refers to as a “special military operation” in Ukraine on 24 February 2022, NATO has officially become Russia’s main adversary and an existential threat to the Russian Federation. Indeed, the Alliance can be found at the very heart of the narrative through which Russia seeks to justify its war against Ukraine.

In fact, around three-quarters of Vladimir Putin’s televised address trying to make sense of the 24 February attack was devoted to denouncing NATO. The Russian president contended that NATO “had deceived” and “played with” Russia, constructing an “empire of lies”, even going as far as to assert the following: “They immediately tried to put the final squeeze on us, finish us off, and utterly destroy us.” According to Putin, the Alliance was using Ukraine as a means to this end, transforming it into a “hostile ‘anti-Russian’” nation, “completely controlled from the outside”. This frames the war as a question of life and death, a lesson Putin claimed had already been learned from what he refers to as Stalin’s disastrous “appeasement” of Hitler between 1939 and 1941 – in his words: “We won’t be making this mistake again.”

His address continues in more detail: “For the United States and its allies, it is a policy of containing Russia, with obvious geopolitical dividends. For our country, it is a matter of life and death, a matter of our historical future as a nation. This is not an exaggeration; this is a fact. It is not only a very real threat to our interests but to the very existence of our state and to its sovereignty. It is the red line which we have spoken about on numerous occasions. They have crossed it.” This is by no means merely a security challenge, but rather – as Putin presents it – a much broader threat: “Properly speaking, the attempts to use us in their own interests never ceased until quite recently: they sought to destroy our traditional values and force on us their false values that would erode us, our people

from within, the attitudes they have been aggressively imposing on their countries, attitudes that are directly leading to degradation and degeneration, because they are contrary to human nature.”²

This reasoning was as fundamental as it was far-fetched – and it reveals what Putin truly means when he refers to NATO. The organisation serves as a cipher, employed to justify a particular worldview and political agenda with one overarching aim: defending Russia’s status in the international system. Russia’s oft-cited concern for military security is thus no more than empty rhetoric with the purpose of giving this ultimate purpose a measure of plausibility. Putin himself publicly acknowledged this at the 16th BRICS Summit in Kazan in October 2024 when, in response to BBC correspondent Steve Rosenberg’s question as to whether the war had undermined rather than strengthened Russia’s security, he emphasized: “You have mentioned drone attacks and so on. Yes, this was not the case, but there was a much worse situation. The situation was that we were constantly put in our place as we made constant and persistent proposals to establish contacts and relations with the countries of the West. I can say this for sure. It seemed kind of gentle, but basically, we were always put in our place. And eventually that placing would have led Russia to the category of second-rate countries to only function as raw material appendages with the loss of the country’s sovereignty to a certain degree and to a large extent. In such a capacity Russia is unable not only to develop, it just cannot exist. Russia cannot exist if it loses its sovereignty. This is what matters most.”³

Contrary to the claims made by Putin and his propagandists, Russia’s full-scale invasion – which, on 24 February 2022, superseded the covert intervention that had been ongoing since 2014 – cannot be construed as an act of liberation from NATO or the West, but unequivocally constitutes a classical postcolonial conflict and imperialist aggression. However, when Valery Garbuzov – Director of the Institute of the U.S. and Canadian Studies of the Russian Academy of Sciences – dared to make a cautious ref-

1 To quote Konstantin Kosachev, Deputy Speaker of the Federation Council and member of the Federal Assembly of the Russian Federation (upper house of the Russian parliament), MOHCTP XXI BEKA (Monster of the 21st century), 12 July 2024, <https://svop.ru/main/54083/#more-54083>. All Russian names and terms have been rendered in Latin script using colloquial transcription.

2 Address by the President of the Russian Federation, 24 February 2022, The Kremlin, Moscow <http://en.kremlin.ru/events/president/news/67843>.

3 News conference following 16th BRICS Summit, 24 October 2024, Kazan <http://en.kremlin.ru/events/president/news/75385>.

erence to this connection, he was dismissed from his post within days.⁴

Thus, the boundaries were drawn within which the discourse on NATO and the West has been allowed to happen. These boundaries are extremely narrow, although certain shifts and differences are still discernible: bellicose, militaristic radicalisation among some, diplomatic restraint among others, and unflinching opposition among those who were forced to leave the country. This limited discourse is characterised, on the one hand, by proponents of an offensive (or rather aggressive) approach to the war, developing narratives which subsequently became part of official parlance, thus also – at least potentially – influencing the Kremlin's thinking and actions. On the other hand, there are those who argue for a defensive (or restraint) approach, for whom, unlike Heraclitus' view, war is not the father and king of all things Russian. For this group, the situation is quite the opposite. In this very limited discursive space, they tend to reproduce the official narratives, if only to avoid drawing undue attention to themselves. Any influence they do exert is through personal connections with decision-makers – not through publicly visible, transparent means. Things looked quite different before the war began.

Russia's demands for "security guarantees" and the run up to the Ukraine war

Putin's declaration of war was not the only message directed primarily at NATO and the US – so, too, was the entire staging of his war preparations. This took the form of two draft documents on "security guarantees": one was a "treaty" aimed at the US, the other an "agreement" directed at NATO. The two documents were published, following Putin's public demand, on 17 December 2021 – apparently hastily put together by the Ministry of Foreign Affairs against the backdrop of a large-scale deployment of troops along the entire Ukrainian border.

While the two documents differed in the details, they contained the same key demands directed at NATO, (1) "to refrain from any further enlargement of NATO, including the accession of Ukraine as well as other States" and (2) "not conduct any military activity on the territory of Ukraine as well as other States in the Eastern Europe, in the South Caucasus and in Central Asia", as per the official English version of the draft NATO agreement.⁵

These demands, while striking a common chord among Moscow's political elite, caused some consternation among Russian experts, raising questions about the purpose of issuing such an ultimatum, one that – it was generally agreed – had no prospect of success.⁶ This resulted in fundamentally different assessments and recommendations, perpetuating the differences that had already been evident before 2021. These positions can be categorised into two clusters.⁷ It is important to note, however, that there is one point on which all commentators unanimously agreed: a war against Ukraine made no sense at all⁸, targeted the wrong people and, despite the serious warnings from US intelligence services, was considered out of the question, as the costs would far outweigh any benefits.

Prominent representatives of the first group are Sergey Karaganov and his associates, including Dmitry Suslov from the Higher School of Economics (HSE Moscow) and founder of the Council on Foreign and Defence Policy (SVOP). Karaganov had already played a key propagandistic role in escalating the tensions in the previous decade and now, with his fundamental criticism of the West, he adopted a blunt, decidedly combative rhetoric. While this approach garnered him public attention, he carelessly sacrificed argumentative coherence – a drive that would visibly intensify with the onset of the war.

Karaganov has strongly denounced NATO, labelling it a "cancer" and demanding that the spread of its "metastases" be halted. He rejected the CSCE's 1990 Charter of Paris for a New Europe, the 1997 Founding Act on Mu-

⁴ Valery Garbuzov, Директор Института США и Канады Валерий Гарбузов об утраченных иллюзиях уходящей эпохи (Director of the Institute of the U.S. and Canadian Studies Valery Garbuzov on the lost illusions of the outgoing era), *Nezavisimaya Gazeta*, 29 August 2023, www.ng.ru/ideas/2023-08-29/7_8812_illusions.html. Here he stated, for example: "Russia is a former empire, the heir to the Soviet superpower, experiencing an extremely painful syndrome of suddenly lost imperial greatness. The fact that Russia today has a pronounced post-imperial syndrome is more of a tragic pattern than a historical anomaly. Its peculiarity is that it did not manifest itself immediately after the collapse of the USSR in 1991, but made itself felt much later, with Putin's coming to power. More than 30 years later, the delayed syndrome, the possible origin of which was not previously given much importance, has become threatening. [...] The goal of all this is quite obvious – plunging its own society into a world of illusions and accompanied by great-power and patriotic rhetoric, an undisguised and deliberate indefinite retention of power at any cost, the preservation of property and political regime by the current ruling elite and the oligarchy integrated with it." After the most militant rabble-rouser Vladimir Solovyev launched a public campaign against him on Russian television, even staff protests could do nothing to get Garbuzov reinstated, see <https://echofm.online/documents/zayavlenie-kollektiva-instituta-ssha-i-kanady-ran>.

⁵ Agreement on Measures to Ensure the Security of the Russian Federation and Member States of the North Atlantic Treaty Organization, Draft, unofficial translation, 17 December 2021, <https://mid.ru/ru/detail-material-page/1790803/?lang=en>. The draft treaty directed at the US focused more on the former Soviet states, see Treaty Between the United States of America and the Russian Federation on Security Guarantees, Draft, unofficial translation, 17 December 2021, https://mid.ru/ru/foreign_policy/rso/nato/1790818/?lang=en.

⁶ See, for example, Fyodor Lukyanov, The West Is Unlikely to Accept Russia's NATO Demands – and the Kremlin Knows It. For the U.S. and NATO, agreeing would mean taking the politically unacceptable step of capitulating to Moscow, 20 December 2021, www.themoscowtimes.com/2021/12/20/the-west-is-unlikely-to-accept-russias-nato-demands-and-the-kremlin-knows-it-a75875. A similar statement also appeared on the Telegram channel of the journal of which Lukyanov is editor-in-chief, *Россия в глобальной политике* (Russia in Global Affairs), t.me/ru_global/17413.

⁷ These clusters are, however, not entirely distinct and cannot easily be described as camps. Although their respective exponents are deeply antagonistic towards each other, they do not engage in public disputes and tend to argue at cross-purposes. See Hans-Joachim Spanger, Russia and the Divisive Discourse on NATO, in: Matthias Dembinski and Caroline Fehl (eds.), *Three Visions for NATO*, Berlin: Friedrich-Ebert-Stiftung, 2021, pp. 87–92.

⁸ In the typical style of one of the exponents of a militant course Sergey Karaganov wrote: "Russian troops near the border of Ukraine are not going to move into the country. It is simply senseless. Grabbing land devastated by its anti-national and corrupt ruling strata is one of the worst scenarios. [...] These troops and other military-technical means, as Russian generals nicely put it, are there to increase pressure on puppeteers rather than on puppets" (Sergey Karaganov, It is not about Ukraine, 7 February 2022, <https://eng.globalaffairs.ru/articles/it-is-not-about-ukraine>).

tual Relations, Cooperation and Security between NATO and Russia, and the NATO-Russia Council. For Karaganov, Russia's draft treaties represented a legitimate and timely attempt to dismantle the provisions set out in these joint documents. In his view: "A direct demand was made for breaking the security system that was established in the 1990s, which is disadvantageous for Russia and therefore simply dangerous and unstable." This was to be achieved, if possible, without a "big war", although he argued that such a war would become "inevitable" if Russia were to remain in the current system and watch on with "indifference" as NATO granted Ukraine membership. This upended Putin's justification for the war, but Karaganov had never ruled out the possibility of a "small war" or "series of local wars" anyway.⁹ It is unclear why he adopted this expectation, particularly given that he did not regard NATO as a "direct threat" – especially following its hasty withdrawal from Afghanistan in the summer of 2021 and in view of what he saw as Russia's military superiority owing to its hypersonic weapons and military build-up, which allegedly granted Russia "escalation dominance" in Europe.¹⁰ The recommendation that follows from this is, as Suslov puts it: "an increase in military tensions with the US and NATO, and a further escalation of the confrontation [...] up to and including the threat of war" as well as "even more intense and demonstrative cooperation with China in the politico-military and military-technical fields".¹¹

The second group is characterised by diametrically opposed recommendations – formulated against the backdrop of a significantly more relaxed analysis of the situation. Andrey Kortunov, for instance, at the time Director General of the quasi-official Russian International Affairs Council (RIAC), is firmly opposed to the confrontational and belligerent course advocated by Karaganov and Suslov to secure Russia's sphere of influence: "On the contrary, stoking up confrontation in Europe and across the globe increases the risk of a head-on military collision that could result in a nuclear war."¹² Kortunov, and others like him, including Dmitry Trenin of the Carnegie Moscow Center, also calls for the "demystifica-

tion" of NATO and its enlargement. He believes that the portrayal of NATO expansion as an "impending eschatological catastrophe, similar to the invasion of the Mongol hordes into Russia in the middle of the thirteenth century" is fundamentally misguided, as: "If the subject of Russian concern is the military infrastructure of NATO, then Russia should focus on this infrastructure, and not on the hypothetical prospect of expanding the bloc."¹³ In Kortunov's view, the proposals put forward by the US and NATO in response to Russia's draft treaties would definitely open up opportunities for talks on confidence-building measures, for instance. Karaganov, however, rejects this notion as "largely senseless", arguing that trust can only be restored, "when basic Russian interests are met".¹⁴

Trenin even goes as far as to describe the risk of granting Ukraine NATO membership as a "phantom". He argues that, in the foreseeable future, this is not a realistic prospect, as NATO is not prepared "to take responsibility for the military defense of their clients, Ukraine and Georgia, and that is unlikely to change".¹⁵ Moreover, Trenin fundamentally argues that: "No expansion of NATO, including at the expense of Ukraine, threatens the military balance and the stability of deterrence. By installing missiles near Kharkiv [sic!], the United States will not gain a serious advantage in the military-strategic field over the Russian Federation." The only potential threat, if it exists at all, concerns the "geopolitical" and "geocultural" dimension – though at the end of January 2021 Trenin acknowledged that the "Supreme Commander-in-Chief" might not share this perspective.¹⁶

When it comes to Ukraine itself, Trenin critically pointed out that its significance in Moscow is still greatly exaggerated, and interestingly "not so much in the public consciousness as in the minds of the elite". The latter, argues Trenin, must finally accept that Ukraine is a "neighboring country that will never again become a brotherly nation. Any ambition of integration should be filed away once and for all in the historical archives and replaced with that of good neighborly relations [...] Russia, accordingly, must not indulge any fantasies that it

9 Sergey Karaganov, HATO — это рак. Пока метастазы только распространяются (NATO is a cancer. So far the metastases are just spreading), *Argumenty i Fakty*, 18 January 2022, https://aif.ru/politics/russia/sergey_karaganov_nato_eto_rak_poka_metastazy_tolko_rasprostranyayutsya. Ibid., From Constructive Destruction to Gathering, 13 April 2022, *Russia in Global Affairs*, No. 1, January/March, <https://eng.globalaffairs.ru/articles/from-destruction-to-gathering>.

10 Karaganov, loc. cit., note 8. The notion of the USSR in the 1960s and 1970s and Russia again today having broken the primarily military-based "500-year hegemony of the West" is a standard topic which Karaganov devotes much time to nurturing and which has regularly been referred to in speeches by Russian officials since 2022.

11 Dmitri Suslov, Следует честно объявить, что Россия и НАТО — противники (It should be honestly declared that Russia and NATO are adversaries), *Kommersant*, 14 January 2022, www.kommersant.ru/doc/5170263.

12 Andrey Kortunov, Is There a Way Out of the Russia-NATO Talks Impasse?, 25 January 2022, <https://russiancouncil.ru/en/analitics-and-comments/analitics/is-there-a-way-out-of-the-russia-nato-talks-impasse/>.

13 Andrey Kortunov, Демистификация страха (Demystifying fear), 31 January 2022, <https://iz.ru/1284241/andrei-kortunov/demistifikatsia-strakha>. Elsewhere, he affirms his earlier objection: "It is often said in Russia that Ukraine and Georgia are 'being drawn into NATO', creating the impression that the countries in question would like to resist but are being forced to slowly yield under pressure from Brussels. In reality, nothing could be further from the truth" (ibid., note 12).

14 Karaganov, loc. cit., note 9.

15 Dmitry Trenin, What a Week of Talks Between Russia and the West Revealed, 21 January 2022, www.themoscowtimes.com/2022/01/21/what-a-week-of-talks-between-russia-and-the-west-revealed-a76108.

16 Dmitry Trenin, Оба сценария предполагают определенную цену и сопряжены с рисками (Both scenarios involve costs and risks), *Kommersant*, 26 January 2022, www.kommersant.ru/doc/5181967?from=glavnoe_5.

will one day grow again to encompass Ukraine – or even its southeastern regions.”¹⁷

Even those who tend to take Moscow’s official grievances with NATO at face value, such as Alexander Dynkin, President of the Primakov Institute of World Economy and International Relations (IMEMO) at the Russian Academy of Sciences, or Alexey Gromyko, Director of the Institute of Europe at the Academy, strongly advocate “flexibility” and “creativity”. While Dynkin was also of the view that “[a] last- ing peace requires that Russia’s interests be taken into account, that it have a strong say, and that it has an interest in this European order”, he, like Gromyko, believed such an outcome could be achieved with a 20–25-year moratorium on NATO expansion “into former Soviet states, including Ukraine”.¹⁸ As we know, however, this never materialised. Instead, the confrontational course to dismantle the existing order in Ukraine and Europe prevailed, albeit in an entirely different form to what even the hawkish supporters of a Russian policy of strength had envisioned and anticipated.

Ukraine: A war against NATO

On 24 February 2022, the die was cast. With it, any prospect of negotiations on European security between Russia and NATO vanished for the foreseeable future – something, in a rare expression of unanimity, both sides agree on to this day. In the Kremlin’s distorted worldview, however, NATO is waging an (offensive) war against Russia in Ukraine, through the Ukrainian people. Nonetheless, Russia insists it is not a war at all but a “special operation”, although within a matter of days it became evident that events were far from unfolding according to the Kremlin’s much-vaunted plan.

Indeed, the decision to launch an all-out war not only meant experts of all stripes had got it wrong, but so too had the majority of nominal decision-makers in Moscow. We only need to recall the piece of theatre that was the legendary Russian Security Council meeting in the Kremlin on 21 February 2022. Broadcast to show recognition of the independence of the two self-declared “people’s republics” in Donbas, Putin, exhibiting behaviour reminiscent of a mafia godfather, demanded a display of public loyalty from his henchman – leaving many of them visibly confused.

This confusion did not last long, however – and the experts, too, soon became quite clear about the situation. Those who had already advocated a confrontational and resolutely anti-Western course in the lead-up to the war adopted an even

more radical position, launching a propaganda offensive in line with the path to war. Those supporting an agreement with the West, on the other hand, found themselves increasingly on the defensive, and now, in the narrow space for discourse that is left, they can do little more than express their discontent indirectly. However, there are still marked differences between the two groups and, over the course of 2023, they escalated into an all-out controversy in the context of the nuclear question.

The bellicists believe the war is the only viable option and are thus determined to fully commit to securing a military victory – over Ukraine in any event, but also over NATO. They see it as providing Russia with an unprecedented opportunity to strengthen its position in Europe, Eurasia and the world at large, as well as to facilitate a fundamental re-organisation of the Russian state, economy and society. This new world order would cast aside the virus that is the West and globalisation, instead focusing on Russia’s own strengths and historical roots, whether they can be traced to Siberia, the Soviet Union, or other even more distant origins. These opportunities are even greater because, according to the bellicists, the West – represented by NATO and the EU – is in a state of secular decline, and America’s global hegemony is nearing its end. All that remains is for Russia to accelerate this decline through its own military action. The resurgence of Donald Trump in the US does little to alter this view – if anything it only reinforces the impression of the decline or indeed collapse of what has tended to be labelled “the collective West”.

Although the sceptics have not publicly opposed the war outright – an act which, in the current climate of repression, could cost them their jobs and potentially their freedom – they have, unlike the bellicists, refrained from indulging in speculations about preferred war aims. Instead, they have highlighted the risks, arguing that Russia has been weakened rather than strengthened by the war – both on the international stage and, owing to sanctions, also economically. At the same time, they point to the growing unity and resolve of the West because of the war, something which at the very least calls into question the government’s vision of a multipolar world order. For the sceptics, Trump gives hope for an end to the war and hence represents an opportunity to neutralise the perceived risks of the Russian war strategy.

Another key difference between the two groups is the sceptics’ belief that, even in the event of a protracted confrontation – which is something they also fear – a return to the status quo ante, to cooperative relations with the West (and thus potentially also with NATO), has not been ruled out but

¹⁷ Dmitry Trenin, How Russia Could Recalibrate Its Relationship With Ukraine, 10 September 2021, https://carnegiemoscow.org/commentary/85314?utm_source=rssemail&utm_medium=email&mkt_tok=MDk1LVBQVi04MTMAAAF_bpKYyNKXuNDVLSuqJwmgdo5U7jgtkH01WsDwtmr2JkOyg1zGl6gKSolz-RfVRYXKEd8QQgKf3ol7ML73y-dCH6ZzbfaFtC6xLpzyptJ8h_klQ. Founder of the Vafor policy advice project Sergey Poletayev holds a similar view, stating in mid-February 2022: “We need to stop seeking recognition of the right to influence the internal Ukrainian situation, the political or economic structure of Ukraine. Russia does not have the resources for this now, Russia has no need for this, it will interfere with the main task. Of course, it is impossible to isolate ourselves completely from European and, in particular, from Ukrainian affairs, but it is necessary to clearly define our interests and goals in order not to overstep their limits” (Sergey Poletayev, О военных тревогах и вооружённом самоустранении [On military alarms and armed self-defence], 14 February 2022, <https://globalaffairs.ru/articles/o-voennyh-trevogah>). After the war began, he became a diligent and highly benevolent commentator on developments on the Russian political and military front.

¹⁸ Alexander Dynkin, Thomas Graham, Четыре шага от пропасти — по пути к европейской безопасности (Four steps from the abyss – towards European security), Kommersant, 10 February 2022, www.kommersant.ru/doc/5206560#id2174394. Alexey Gromyko, Diplomacy vs Brinkmanship, 2 February 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/diplomacy-vs-brinkmanship/>.

rather remains a viable option and one that should be actively pursued. The bellicists, in contrast, favour a fundamental and lasting departure from everything the West represents. They argue that, in keeping with global trends, Russia's future lies in the East and as a leading power in the South.

Although there is a basic continuity in substantive and personnel matters, since 2014 at the latest, some interesting crossing of boundaries have been observed – and this not only refers to the emigration of a great many critical scholars. A compelling example of the intellectual collateral damage caused by Russia's war of aggression is Dmitry Trenin. Trenin was the Director of the Carnegie Moscow Center until, in April 2022, along with the in-country offices of the German political foundations, the Carnegie Center was forced to close its doors. As the only US-funded institution still operating in Russia at the time, it is quite surprising that it had remained open for so long, given that it met the government's "foreign agent" criteria, a designation officially introduced in 2012, to the letter. A closer look at Trenin's subsequent career, however, quickly reveals why he was able to continue working for so long. Apparently, while at Carnegie, he also devoted himself to providing entirely different services and was thus able to secure what the Russians call "krysha" (engl.: roof) or protection from those in higher echelons. In any case, the majority of Carnegie employees left Russia to establish the Carnegie Russia Eurasia Center in Berlin, while Trenin radically changed his views in search of new employment within Russia.¹⁹

Thanks to his patriotically framed change of course, by the summer of 2022, Trenin managed to secure a position at HSE University facilitated by Sergey Karaganov, with whom he had previously had no ties at all. Since then, Trenin has been Karaganov's alter ego, even adopting his effusive style of expression. In early 2024, he was also appointed as Academic Supervisor (later director) at the Institute for World Military Economy and Strategy, founded by Karaganov as part of HSE University and during the first year nominally headed by retired Admiral and former Commander of the

Pacific Fleet Sergey Avakyants. Trenin's reasoning for his turnaround: "I served in the Soviet and Russian armies for more than 20 years. And when my country is engaged in a military conflict, my place as an officer is in my country, next to my army."²⁰

Even as a *Politruk* – the political officers inherited from the Soviet army and charged with ideological education – it was by no means a foregone conclusion that he would become, along with Karaganov, one of the most incisive and radical academic representatives of the militarist discourse. Karaganov has his own unique explanation for a war that he had not so long ago dismissed as totally senseless: "The cold war actually turned into a hot war because we waited too long. We should have hit in 2018-2019."²¹ His aim, which extends beyond the war in Ukraine, is to dismantle the European security order, which he describes as a "Versailles system number two", an order "built against Russia" and one that Russia once mistakenly tried to be part of.²² In retrospect, he views this, much like the "rapprochement with the West", as a "strategic mistake" made by the late Soviet and early post-Soviet Russian leadership, where the "biggest error" was engaging in negotiations with NATO in the first place, "which legitimized the organization and its expansion".²³ The real objective, he argues, should be, "to act against NATO, to break up NATO and to destroy NATO".²⁴

Told with less bluster but the same overall gist, the story of how Russia pursued its futile integration efforts is also echoed by others, including voices from the early mainstream. The common theme here is that, in truth, Russia has not really anything to do with the rules and principles once jointly agreed upon – for instance those laid out in the 1990 Charter of Paris for a New Europe as well as the countless OSCE documents that followed. In Trenin's view: "Russia, for its part, could not submit to rules that had been elaborated without its participation and that promised it an essentially subordinate position in the pan-European house."²⁵ And Fyodor Lukyanov, too, tells the tale of the "large-scale historical experiment", which

19 Originally, IMEMO offered Trenin accommodation and subsistence in recognition of his past achievements, as replacement for Sergey Utkin, a scholar who made no secret of his condemnation of Russian aggression and who had also left the country. But this was something Trenin never quite managed.

20 Dmitry Trenin, Секретная предыстория СВО: почему Россию не взяли в коллективный Запад (The secret prehistory of the special military operation: Why Russia was not included in the collective West), 17 May 2023, <https://russiancouncil.ru/analytics-and-comments/comments/sekretnaya-predystoriya-svo-pochemu-rossiyu-ne-vzyali-v-kollektivnyy-zapad>.

21 Sergey Karaganov, Мы сбрасываем западное иго... (We are throwing off the Western yoke...), 30 May 2023, <https://russiancouncil.ru/analytics-and-comments/comments/my-sbrasyvaem-zapadnoe-igo>.

22 Sergey Karaganov, We are at war with the West. The European security order is illegitimate, Corriere della Sera, 8 April 2022, www.corriere.it/economia/aziende/22_aprile_08/we-are-at-war-with-the-west-the-european-security-order-is-illegitimate-c6b9fa5a-b6b7-11ec-b39d-8a197cc9b19a.shtml.

23 Sergey Karaganov, Нам с Западом не по пути (We are not on the same path as the West), 27 January 2023, <https://russiancouncil.ru/analytics-and-comments/comments/nam-s-zapadom-ne-po-puti/>.

24 Mikhail Rostovsky, Автор идеи ударить по НАТО ядерным оружием Караганов: "Президент меня слышит" (The author of the idea to launch a nuclear strike against NATO, Karaganov: "The president is listening to me"), Moskovsky Komsomolets, 9 October 2023, www.mk.ru/politics/2023/10/09/avtor-idei-udarit-po-nato-yadernym-oruzhiem-karaganov-prezident-menya-slyshit.html. As evidence of Russia's goodwill, he revisits the argument that Russia even sought to join NATO, a position he himself claims to have advocated in the 1990s (to transform NATO into a "pan-European security system"). Commenting on this theory in February 2023, former Russian Foreign Minister and President of the RIAC, Igor Ivanov, stated that, while some might have spoken about in passing, "I have never heard of Russia ever officially requesting membership in NATO" (Igor Ivanov, Russia-NATO: On the History of the Current Crisis, 3 February 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/russia-nato-on-the-history-of-the-current-crisis>). And Alexander Dynkin further clarifies that joining NATO and the EU would only have been possible at the cost of sovereignty in security and defence matters: "Our political elite did not immediately understand this, and when it did, naturally, the choice was: not to enter" (Alexander Dynkin, Стратегическое оружие России и экономическая мощь Китая станут противовесом США в новом мире [Russia's strategic weapons and China's economic power will counterbalance the US in the new world], 12 December 2022, <https://russiancouncil.ru/analytics-and-comments/comments/razdelenie-mira-borba-s-verkh-derzhav-i-rasplata-raskryto-cto-proizoydet-v-blizhayshie-20-let>).

25 Dmitry Trenin, Кто мы, где мы, за что мы – и почему (Who we are, where we are, what we are for – and why), 11 April 2022, <https://globalaffairs.ru/articles/kto-my-gde-my>.

ultimately failed in 2022, of Russia's integration into the "European order as created by the United States and its allies".²⁶ Such distorted pictures are hardly surprising, given that "no one has ever had a clear picture of what integrating Russia into the 'Greater West' meant in practice. Probably because this, in fact, is simply impossible.[...] The conflict in Ukraine is the natural outcome of a confrontation that was building up."²⁷ In this view, the war becomes the natural order of things, and Russia is relieved of all responsibility.

But this is not enough for the bellicists. The goals they advocate are much more far-reaching. For them, the war in Ukraine is merely a proxy war and is only a small part of a much larger struggle. It is about establishing a new European – indeed world – order in which Western, or more specifically American, hegemony is dismantled. Until 14 June 2024, Putin had not clearly defined his war aims in Ukraine beyond general slogans (demilitarisation, denazification, neutralisation), leaving room for others to promote their own objectives. Bellicists like Karaganov and Trenin seized this opportunity. Their goals also varied, however, especially when it came to the fate of the "rest of Ukraine" (Galicia and Volhynia in the west of the country). At some point, this region was to remain as a rump state, while at others it was to be annexed by Poland or Hungary.²⁸ But once the current operation is concluded – with a Russian victory for sure – the focus will be on shaping a new European order. As Trenin puts it, the aim will be to force "NATO countries to actually recognize Russian interests as well as to secure Russia's new borders".²⁹ In this context, as Karaganov argued in early 2024, a longer-term peace settlement would only be possible "as part of a general agreement, including the creation of a new European/Euro-Asian security system".³⁰ Lukyanov agrees, arguing in mid-2024 that the conflict can only come to an end "when NATO abandons its main goal and function".³¹

Framing the war as an existential battle

In keeping with the longstanding paranoid tradition, Russia's offensive goals are paired with the narrative of Russia's perpetual need to defend itself, with its recourse to existential challenges, a point Trenin, in particular, emphasises: "For Russia, this conflict is existential: should it lose it, the country will not only be stripped of its great power status but also, de facto, its sovereignty. Some fear that Russia may even be broken into a few pieces for better management from the outside. Many observers view the situation as no less serious than in 1941."³² In view of these dimensions, it is not surprising that both Trenin and Karaganov envisage a protracted conflict lasting at least 20 years³³, with no prospect of a "strategic compromise".³⁴ Russia, they argue, has no other option. In Karaganov's words: "It is Russia's destiny to be in the forefront. We must unite, endure, and win. I think the West will have to come to terms with a more modest position in the world system."³⁵

The tendency to extremes, so characteristic of the Russian discourse, is clearly on display here, currently manifested in a distinctive blend of paranoia and megalomania. In Trenin's case, the former predominates, and in Karaganov's, the latter – expressed with an emotional rage that has led to and will certainly continue to lead to a great many rhetorical blunders. In essence, this is about Russia positioning itself as vanguard of global change, with the West, and Europe in particular, doomed to fail: "So the West will never recuperate, but it doesn't matter if it dies."³⁶ On their own, however, these processes – as identified or indeed simply asserted by Karaganov – are not enough. Russia has to actively steer them: "Another strategic task is to push Europe, the source of most of humanity's misfortunes over the past five centuries, two world wars, aggressions against Russia, colonialism, racism, genocides, monstrous ideologies (we are witnessing the latest wave of anti-human values now) from the position of an important world

26 Fyodor Lukyanov, Старое мышление для нашей страны и всего мира (Old thinking for our country and the entire world), 1 April 2022, Russia in Global Affairs, No. 2, March/April 2022, <https://globalaffairs.ru/articles/staroe-myshlenie>.

27 Fyodor Lukyanov, Движение вверх? (Moving up?), 24 February 2023, <https://globalaffairs.ru/articles/dvizhenie-vverh>.

28 See, for example, Dmitry Trenin, Six months into the conflict, what exactly does Russia hope to achieve in Ukraine?, 8 September 2022, <https://russiancouncil.ru/en/analytics-and-comments/comments/six-months-into-the-conflict-what-exactly-does-russia-hope-to-achieve-in-ukraine>. In a different context, regarding the experience in Syria, Trenin references the militarist maxim used by tsarist general Suvorov, which states that "an uncut forest will grow again", adding: "The liberation mission of Russia – its historical task – does not end with the liberation of the cities and villages of Donbass and Novorossiia. It is aimed at liberating the whole of Ukraine from the anti-Russian Bandera regime, its neo-Nazi ideology, as well as from the influence of external forces hostile to the Russian world" (Dmitry Trenin, Какой должна стать Украина после завершения российской спецоперации [What should Ukraine become after the completion of the Russian special operation], Profil, 18 December 2024, <https://profile.ru/abroad/kakoj-dolzha-stat-ukraina-posle-zaversheniya-rossijskoj-specoperacii-1635806>).

29 Dmitry Trenin, Политика и обстоятельства (Politics and circumstances), 20 May 2022, <https://globalaffairs.ru/articles/politika-i-obstoyatelstva>.

30 Sergey Karaganov, Часть людей потеряли страх перед адом. Нужно восстановить (Some people are no longer afraid of hell. Their fear must be restored), 9 January 2024, <https://m.business-gazeta.ru/article/619108>.

31 Fyodor Lukyanov, This Is the Only Way to End Confrontation Between Russia and the West, 25 June 2024, <https://eng.globalaffairs.ru/articles/only-way-to-end-confrontation>.

32 Dmitry Trenin, Two Worlds of Russia's Foreign Policy, 1 June 2023, <https://russiancouncil.ru/en/analytics-and-comments/analytics/two-worlds-of-russia-s-foreign-policy>. Going even further back in history, this helped the West "finally solve the 'Russia question'" (Dmitry Trenin, Политика и обстоятельства [Politics and circumstances], 20 May 2022, <https://globalaffairs.ru/articles/politika-i-obstoyatelstva>).

33 Sergey Karaganov, "Крепость Россия". Сколько лет продлится конфронтация с Западом? ("Fortress Russia". How long will the confrontation with the West last?), 16 June 2022, <https://globalaffairs.ru/articles/krepost-rossiya-i-zapad>.

34 Dmitry Trenin, "Переиздание" Российской Федерации. Контуры внешней политики России для периода гибридной войны ("Reissuing" the Russian Federation. The contours of Russian foreign policy during the period of hybrid warfare), 21 March 2022, <https://globalaffairs.ru/articles/pereizdanie-rossijskoj-federaczii>.

35 Sergey Karaganov, Против нас большой Запад, который рано или поздно начнёт сыпаться (The big West that is against us is going to start crumbling sooner or later), 18 April 2022, <https://globalaffairs.ru/articles/protiv-nas-bolshoj-zapad>.

36 Sergey Karaganov, Russia cannot afford to lose, so we need a kind of a victory, 4 April 2022, <https://russiancouncil.ru/en/analytics-and-comments/comments/russia-cannot-afford-to-lose-so-we-need-a-kind-of-a-victory>.

player. Let it simmer in its juices. [...] Spengler's theory of the decline of the West and Europe, turned out to be visionary.³⁷ Now that, thanks to Trump, the US has – at least for the time being – been removed from this equation, Russia's wrath is directed solely at Europe; something that is also reflected in official statements issued by Moscow since early 2025. As Karaganov frequently likes to drop into conversation, Europe's "back must be broken [...] as we did in the past with our victories over Napoleon and Hitler".³⁸ Russia's historical mission is thus to play "its role in freeing the world from Western domination"³⁹, a role which, according to Karaganov, falls to Russia because its people "are divinely chosen". He continues: "We are really a special people, a people-civilization, a civilization of civilizations. Our people have several missions, one of which is to regularly liberate the world from all pretenders to dominance and hegemony."⁴⁰

Strikingly, Fyodor Lukyanov essentially follows the same line of reasoning. Institutionally he is closely aligned with Karaganov: With the sole exception of the post of Dean of the Faculty of World Economy and World Politics at HSE University, Lukyanov has succeeded Karaganov, his intellectual mentor, in every position he held: Head of the SVOP, Editor-in-Chief of the journal "Russia in Global Affairs", and Research Director at the Valdai International Discussion Club, Putin's platform for international outreach. At the same time, Lukyanov has made it clear that he is not really comfortable with Karaganov's war rhetoric, and even though he also distances himself somewhat from the Kremlin's path of war, he is nevertheless committed to the principle that this is "my country, right or wrong. This is my country, even if it is wrong." And his guiding objective remains for Russia to emerge from the war "stronger".⁴¹ The result is an ambiguous position that produces a remarkably high volume of commentary. For instance, like Karaganov, he too says of Russia: "Once again (it seems like for the fourth time in just over a century) our country is assuming the role (and burden) of the main agent of global change."⁴² However, he also cautions against the risks of adopting the role of a

"battering ram", as "here we should not forget the fate of the USSR, which initiated grandiose international changes and ended up being the only one who became their victim".⁴³ Elsewhere, however, Lukyanov downplays the confrontation between Russia and the West – in keeping with his propensity to base his reasoning on the principles of natural law – arguing that it would barely have any impact on global processes. It is more that the world is experiencing objectively "tectonic changes" such that the West is no more able to halt the disintegration of the old liberal order than Russia is to accelerate this process, since: "If we look at events from a historical perspective, Russia is now primarily engaged in its own self-determination after the exhaustion of the long post-Soviet trail."⁴⁴

In both Karaganov's and Trenin's eyes, the self-determination invoked by Lukyanov had a specific, decidedly anti-Western connotation: "The further we are from the West, the better it is for us."⁴⁵ This sentiment is partly linked to the current situation, but also stems from deeper socio-cultural factors, as "we are more a Euro-Asian than a European country".⁴⁶ Indeed, Karaganov sees this distancing from the West as an act of liberation: "We must move to the East. Mentally, economically, politically, because we are stuck in the West, and this is one of our fundamental weaknesses and causes of our troubles over the last 40-50 years."⁴⁷ This also brings into focus the fundamental turning point in Russian history – the country's opening to Europe 300 years ago. In this vein, Trenin postulates: "In fact, we are talking about a rejection of part of the legacy of Peter the Great – the three-hundred-year-old tradition of positioning Russia not only as a great European power, an integral part of the balance of power on the continent, but also as an integral part of the pan-European civilization. The U-turn is fundamental."⁴⁸ It is surprising that the same fundamental turn is reproduced by more moderate commentators such as Alexander Dynkin from IMEMO: "Historically speaking, for 300 years, starting with Peter the Great, Europe has been a role model for Russia. Today, I am convinced that this period is coming to an end. We need to

37 Sergey Karaganov, Размышления на пути к победе (Reflections on the path to victory), 21 November 2024, <https://globalaffairs.ru/articles/na-puti-k-pobede-karaganov>.

38 Sergey Karaganov, Сломать хребет Европе: какой должна быть политика России в отношении Запада (Breaking the back of Europe: What Russia's policy towards the West should be), Profil, 21 January 2025, <https://profile.ru/abroad/sloamat-hrebet-evrope-kakoj-dolzha-byt-politika-rossii-v-otnoshenii-zapada-1651213>. Indeed there is another reason why this is an appropriate label for Europe: "Europe must be called what it actually deserves to be called in order to make the threat of the use of nuclear weapons against it more convincing and justified."

39 Sergey Karaganov, От не-Запада к Мировому большинству. Россия уходит от евроатлантической цивилизации (From non-Western to world majority. Russia is leaving Euro-Atlantic civilisation), 1 September 2022, Russia in Global Affairs, No. 5, September/October 2022, <https://globalaffairs.ru/articles/ot-ne-zapada-k-bolshinstvu>.

40 Karaganov, loc. cit., note 30. He continues: "Ukraine is an important but small part of the engulfing process of the collapse of the former world order of global liberal imperialism imposed by the United States and movement toward a much fairer and freer world of multipolarity and multiplicity of civilizations and cultures" (Sergey Karaganov, Why Russia Believes It Cannot Lose the War in Ukraine, New York Times, 21 July 2022, <https://russiancouncil.ru/en/analytcs-and-comments/comments/why-russia-believes-it-cannot-lose-the-war-in-ukraine>).

41 Fyodor Lukyanov, Мир начал меняться намного раньше (The world started changing much earlier), 2 December 2022, <https://globalaffairs.ru/articles/namnogo-ranshe>.

42 Lukyanov, loc. cit., note 26. This is tied to what was likely an unintended consequence of sanctions: "By abolishing globalization for itself, Russia makes a decisive contribution to its abolition for all."

43 Fyodor Lukyanov, Какие три цели преследует Россия, проводя спецоперацию на Украине (What are the three goals of Russia's special operation in Ukraine), 26 December 2022, <https://russiancouncil.ru/analytcs-and-comments/comments/kakie-tri-tseli-presleduet-rossiya-provodya-spetsoperatsiyu-na-ukraine>.

44 Fyodor Lukyanov, Не по порядку. Обойти Россию в нормальных условиях невозможно (Out of order. It is impossible to bypass Russia under normal conditions), 1 September 2024, Russia in Global Affairs, No. 5, September/October 2024, <https://globalaffairs.ru/articles/ne-po-poryadku-lukyanov>.

45 Sergey Karaganov, Why Russia Believes It Cannot Lose the War in Ukraine, New York Times, 21 July 2022, <https://russiancouncil.ru/en/analytcs-and-comments/comments/why-russia-believes-it-cannot-lose-the-war-in-ukraine>.

46 Sergey Karaganov, Куда течет Река — 2024 (Where the river flows – 2024), Rossiyskaya Gazeta, 27 December 2023, <https://svop.ru/main/50877>.

47 Karaganov, loc. cit., note 21.

48 Trenin, loc. cit., note 25.

redefine ourselves as a self-sufficient, developed North, a partner of Greater Asia and the Global South, an active participant in the future polycentric world order, which is forming today not in Europe, but rather in Eurasia.”⁴⁹

Framing the war as a process of “self-cleansing”

For the bellicists, the reorganisation of Russia is as crucial as the reorganisation of the world. As Karaganov argues: “the special military operation helps our self-cleansing from Westerners and Westernism, helps us find our new place in history”.⁵⁰ Besides the “nationalisation” of the Russian elite, the primary focus is to eliminate the “huge comprador class” that emerged during the failed reforms of the 1990s. This is viewed as a prerequisite for the country’s return to its supposedly authentic roots: “We are now becoming the people we were and should be. A Eurasian people-civilization.” It is hardly surprising that this includes a form of “modern mobilisation” as well as the goal of achieving maximum “self-sufficiency” for the Russian economy, along with other elements drawn from the Soviet era.⁵¹

None of this is particularly original. In fact, it is more of a reactivation of ideas that we are familiar with from the Slavophiles and Panslavists of the 19th century – more specifically in the radical and reactionary forms articulated by Mikhail Katkov and Nikolay Danilevsky. These intellectual currents mark what in German history has been identified as a “special path”, a trajectory that ultimately led to disaster. The distinct Eurasia-oriented “state civilisation”, as it is referred to in Russia’s recently unveiled foreign policy concept⁵², may well reinforce the country’s separation from the West. However, as Russian critics have also pointed out⁵³, it fails to mask the instrumental and artificial nature of the document.

Equally concerning is the fact that Karaganov in particular has rhetorically aligned with the fascist discourse of the type that has been cultivated by representatives of the Izborsky Club for decades – a rhetoric the Kremlin has also been borrowing from since the start of the war. The Izborsky Club was founded in 2012 by the red-brown, blood-and-soil esoteric writer Alexander Prokhanov, with whom Karaganov boasts to have the “nicest, friendliest of relationships”.⁵⁴

One member of the Club with even broader public reach is neo-Eurasian fascist Alexander Dugin. From the very start of the Ukraine War in 2014, Dugin, much like Karaganov today, was already calling for internal purges and the elimination of a “fifth column” – meaning the overt opposition to Putin (which has now all but disappeared). He also called for the eradication of a “sixth column”, allegedly recruited from among Putin’s “inner circle” and said to represent “pro-American” positions (which of course is now also inconceivable, not that this protects anyone from denunciation since Dugin assigned this label broadly to anyone who, in his view, espoused liberal ideas in any form).⁵⁵ In the same vein, he expressed his view on the war in Ukraine which he described in 2022 as a “religious war in the deepest and most direct sense of the word”. This rhetoric is as much aligned with that of Karaganov as his portrayal of the West as the “civilisation of the devil” and the contrasting exalted image of the Russians: “Russians are not a nation. Russians are a spiritual vocation, a choice, a response to the deep call of existence. To be Russian is to be called to the final battle at the end of time, to stand with God against the devil.”⁵⁶

But how can the critics express their scepticism?

In the wake of the full-scale invasion, the opponents of Russia’s war in Ukraine were confronted with the decision of whether to “stay or go”. Those who decided to stay were then faced with a second dilemma: they either had to fall in line with the war narrative or remain silent, as open criticism was no longer possible. Consequently, many were left with just one option – to seek out alternative realities.

Andrey Kortunov exemplifies a worldview that stands in stark contrast to that of the bellicists, without him explicitly confronting or criticising it. From 2011 to 2023, Kortunov served as Director General of the RIAC, but resigned from the post at the initial stages of the war and has since held the role of Academic Director. He was succeeded by his former deputy, Ivan Timofeev, who since 2014 has gained recognition as an expert on sanctions policy and whose outlook, while not fundamentally different from Kortunov’s, is more open to a broader range of perspectives (among other things, Timofeev also serves as Programme Director for the Valdai Club).

⁴⁹ Alexander Dynkin, О Формировании Нового Мировопорядка По Модели “Север — Юг” (On the formation of a new world order based on the “North-South” model), 28 November 2023, <https://russiancouncil.ru/analytics-and-comments/comments/o-formirovani-novogo-mirovoporyadka-po-modeli-sever-yug>.

⁵⁰ Karaganov, loc. cit., note 46.

⁵¹ Karaganov, loc. cit., note 30.

⁵² Указ об утверждении Концепции внешней политики Российской Федерации (Decree on Approval of the Concept of Foreign Policy of the Russian Federation), 31 March 2023, <https://kremlin.ru/events/president/news/70811>.

⁵³ For instance, Andrey Kortunov states that “the popular concept of Russia as *state-civilization* remains rather general and arguably declaratory”, lamenting that “the notion of *Russia’s values* different from the values of the West remains vague and ambiguous” (Andrey Kortunov, Beyond the Conflict in Ukraine: Towards New European Security Architecture, 7 May 2024, <https://russiancouncil.ru/en/analytics-and-comments/analytics/beyond-the-conflict-in-ukraine-towards-new-european-security-architecture>). Along similar lines, see also Ivan Timofeev, A State as Civilisation and Political Theory, 18 May 2023, <https://valdaiclub.com/a/highlights/a-state-as-civilisation-and-political-theory>.

⁵⁴ Karaganov, loc. cit., note 30.

⁵⁵ Alexander Dugin, Это моя война! (This is my war!), 2 June 2014, www.dynacon.ru/content/articles/3274. Along similar lines, see also Alexander Dugin, Глобальная сеть либералов (Global Network of Liberals), 27 October 2014, www.dynacon.ru/content/articles/4128. These are but a few examples from a whole host of similar statements.

⁵⁶ Alexander Dugin, Русская Идеология и цивилизация Антихриста (Russian ideology and the civilisation of the antichrist), 8 November 2022, <https://izborsk-club.ru/23532>.

It was also Timofeev who, shortly after the start of the Russian aggression, posed the (self-)critical question of why virtually all Russian – and indeed Western – experts (including the author of this article) had considered the attack almost inconceivable. This is all the more pertinent, given that all his negative predictions, outlined in an article published on 25 November 2021, have actually come to pass, yet with seemingly no deterrent effect on the Russian leadership.⁵⁷ As a result, he comes to the pessimistic conclusion that the Kremlin's political calculations remain opaque – and, as expected, his overall assessment is negative, too: “The bottom line is that the costs far outweigh the benefits.”⁵⁸ In light of this experience, it now seems as plausible as it is imperative to assume – beyond the case of Ukraine – a nonchalant, even excessive aggressiveness by the current Russian leadership, hence the *worst-case* scenario rather than a *best-case* scenario of rational decision-making.

Such overt criticism of the war is no longer voiced – neither by Timofeev nor by Kortunov. Instead they emphasize risks, missed opportunities and possible alternatives to the official course of war. Thus, Kortunov, for example, articulates the exact opposite of Karaganov's war optimism, which frames the war as a missionary pursuit of a new world order: “In all probability, times lie ahead that are darker and more dangerous than even those that ended in Perestroika and ‘new thinking’ or in the final collapse of the socialist system globally and the Soviet Union regionally.” In Kortunov's view, an arms race, sanctions and technological decoupling are the adverse consequences that are already evident today.⁵⁹

Kortunov thus does not view the war as a confrontation with the West – let alone a defensive battle; nor does he see it as the outcome of Russia's failed European integration efforts. Rather, he views it, not unlike Garbuzov, as the (for the time being) final stage of the collapse of the Soviet Union: “Therefore, the real collapse of the USSR is only taking place today, literally in front of our eyes, and the states that have emerged in the post-Soviet space have yet to go through all the challenges, risks,

and pains of imperial disintegration.” The fact that this process of disintegration has (once again) erupted into violence is, according to Kortunov, largely attributable to Russia's inability “to find an effective model of social and economic development that would be perceived as a role model in neighboring countries” – unlike Germany (and to some extent also France) in the EEC in the 1960s and 1970s. The fact that Russia is now seeking to compensate for this by military means prompts Kortunov to remark sarcastically: “Any rational cost-benefit analysis would suggest that the Kremlin has a lot to lose, but not much to gain by trying to reconstruct Ukraine by military means.”⁶⁰

Alongside his repeated disparagement of Russia's overly simplistic criticism of NATO expansion in the past, for Kortunov it becomes clear that the war does not serve as a foundation but rather constitutes an obstacle on the path to a new global order – a view that also stands in stark contrast to that of the bellicists. In his view, the war is paving the way for a “new consolidation of the West” with the result that: “If the consolidation of the West continues in the coming years, it will inevitably push back the prospect of a mature multipolar world, for a long time. In this renewed unipolarity, Russia will be thrown back to the positions it had 30 years ago, just after the collapse of the Soviet Union.”⁶¹ Here, too, Lukyanov adopts an intermediary position, expressing scepticism as to whether this consolidation will prove sustainable, given that “despite the demonstration of unity, there are manifest and significant differences within NATO”. In his view, the crucial factor here is that “the balance of forces is clarified in the most traditional way – on the battlefield. And until it is clarified, there will be no full understanding of NATO's functionality for the coming years.”⁶² Given the bomb Donald Trump planted under NATO with the dramatic start to his second term of office, Lukyanov's vision of disintegration appears – at least for the time being – more accurate than the consolidation diagnosis.

In light of all this, forecasts regarding Russia's future status also vary greatly. For bellicists like Karaganov, it is

⁵⁷ Ivan Timofeev, War Between Russia and Ukraine: A Basic Scenario?, 25 November 2021, https://valdaiclub.com/a/highlights/war-between-russia-and-ukraine-a-basic-scenario/?utm_source=newsletter&utm_campaign=252&utm_medium=email. At the time, he concluded, for instance: “The scale of NATO's military build-up on Russia's western borders is likely to devalue any control that Russia may be able to gain over Ukraine. We will be dealing with these consequences for decades to come.” And he summed up as follows: “In other words, the costs of a possible war far outweigh the benefits. The war is fraught with significant risks to the economy, political stability and Russian foreign policy. It fails to solve key security problems, while it creates many new ones.”

⁵⁸ Ivan Timofeev, Why Experts Believed an Armed Conflict with Ukraine Would Never Happen, 4 March 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/why-experts-believed-an-armed-conflict-with-ukraine-would-never-happen>.

⁵⁹ Andrey Kortunov, The end of diplomacy? Seven Glimpses of the New Normal, 28 February 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/the-end-of-diplomacy-seven-glimpses-of-the-new-normal>.

⁶⁰ Andrey Kortunov, Moscow's Painful Adjustment to the Post-Soviet Space, 1 April 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/moscow-s-painful-adjustment-to-the-post-soviet-space>.

⁶¹ Andrey Kortunov, Consolidation of the West: Opportunities and Limits, 31 May 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/consolidation-of-the-west-opportunities-and-limits>. With the observation: “It may turn out that the bet on the fall and imminent demise of the West is illusory, and Russia will turn out to be the weak link”, Timofeev is beating the same drum. Ivan Timofeev, No Time for Fatalism, 27 April 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/no-time-for-fatalism>.

⁶² Fyodor Lukyanov, Десятилетия назад Россия и НАТО исходили из невозможности прямого столкновения. Это уже в прошлом (Decades ago, Russia and NATO assumed a direct clash was impossible. This is now in the past), 13 July 2023, <https://russiancouncil.ru/analytics-and-comments/comments/desyatiletiya-nazad-rossiya-i-nato-iskhodili-iz-nevozmozhnosti-pryamogo-stolknoveniya-eto-uzhe-v-pro>. More specifically: “Those of these countries that border Russia feel the threat emanating from Russia. For the rest, Russian expansionism is a frightening image, a bogeyman, but not a seriously perceived danger” (Fyodor Lukyanov, Пора сохраняться? Еще нет [Is it time to persevere? Not yet], 14 July 2023, <https://russiancouncil.ru/analytics-and-comments/comments/pora-sohranyatsya-eshche-net>).

quite clear that once the war is – as expected – successfully concluded, “Moscow’s position in the world will be qualitatively strengthened: Russia will assert itself as a country capable of substantially changing the general balance of forces on the international stage and determining the direction of world politics.”⁶³ Kortunov, on the other hand, anticipates precisely the opposite, irrespective of the war’s outcome: “In any case, Russia will face a relatively lengthy period when the country has to reduce its activism in foreign policy, even in areas that used to be its priorities. At the same time, Moscow will increasingly have to perform the role it is not used to in Eurasia, that of a ‘minority stakeholder’ achieving its objectives within coalitions with stronger partners.”⁶⁴ Lukyanov, too, expresses concern that “Russia is now reaching the limits of its true power” and, as a result, its recent global activism – in the Middle East, for instance – will have to be scaled back.⁶⁵ In sum, he states: “A year after the fateful decisions, we still can’t say for sure whether what is happening to Russia is a move up or down in world politics. Actually, it is possible that the best option for the country would actually be to move sideways, from explicit confrontation to reliance on self-development. But no one seems to be prepared to let Russia do that.”⁶⁶

Considering the fundamentally different visions of the future, the prospects of reaching an understanding on the future European order are even worse. This agreement is something Kortunov seeks to achieve, not least because, much like during the Cold War, shared interests do still exist today: “The most evident convergence of interests is in reducing risks of an uncontrolled escalation and the likely costs of the continuous political and military confrontation.” In light of this, Kortunov advocates an incremental approach, beginning with the restoration of communication. This could be followed by confidence-building measures to improve transparency and predictability, the goal being “to restart the process that they launched together almost forty years ago”⁶⁷ – in other words, the very process that today’s bellicists consider to be an abomination. And for precisely this reason, they have devised an entirely different response to the current crisis.

Nuclear blackmail

In his declaration of war, broadcast to the Russian public, Putin expressed his conviction that he could use overt nuclear threats to deter the Western supporters of Ukraine from further involvement: “No matter who tries to stand in our way or all the more so create threats for our country and our people, they must know that Russia will respond immediately, and the consequences will be such as you have never seen in your entire history.”⁶⁸

According to the Center for Strategic and International Studies in Washington, between 24 February 2022 and mid-July 2023, Moscow issued a total of 234 threats, more or less explicitly referencing Russia’s nuclear potential.⁶⁹ Not only did these threats fundamentally contradict the commitment reiterated by the five permanent members of the UN Security Council as recently as 3 January 2022, to never seek to wage a nuclear war.⁷⁰ They did not even have the desired effect of deterring the West from intervening in Russia’s dismemberment of Ukraine. This was something Dmitry Trenin was not happy about at all.

In an interview with Fyodor Lukyanov, published in September 2022 – albeit only in Russian – under the revealing headline “Bring back the fear!”, Trenin presented the nuclear response to the Western ignorance and disrespect he himself had identified. In the interview, he referred to the oft-cited rhetorical question Putin posed at the 2018 Valdai Annual Meeting:⁷¹ “Why would we want a world without Russia?”, a clear signal of the growing appetite for risk – and the fearlessness that Trenin now accuses the West of. Given that peace is based on fear “and nothing else”, Trenin believed that the US in particular needed to be taught that nuclear weapons could very easily become “an effective element of deterrence in the specific Ukrainian situation [...] in order to convince the United States that a strike would also follow on U.S. territory. Because a strike on Ukrainian territory would not, in general, stop anyone, a strike on European territory would not be seen as critical, as critically dangerous. A strike on U.S. territory is a different matter.” And in order to lend these reckless suggestions some moral authority, he elevates Russia’s aggression to an existential question of the country’s fate “in the most fundamental

⁶³ Karaganov, loc. cit., note 39.

⁶⁴ Andrey Kortunov, Restoration, Reformation, Revolution? Blueprints for the World Order after the Russia-Ukraine conflict, 11 May 2022, <https://russiancouncil.ru/en/activity/workingpapers/restoration-reformation-revolution-blueprints-for-the-world-order-after-the-russia-ukraine-conflict>.

⁶⁵ Fyodor Lukyanov, We have a conflict of ideologies, which doesn’t provide for a compromise, 24 June 2022, <https://nop-society.ru/interview/tpost/f6e5zojtz1-fedor-lukyanov-u-nas-mirovozzrencheskaya>.

⁶⁶ Lukyanov, loc. cit., note 27. Elsewhere he added: “And for Russia, with its huge resource, logistics, transport, and geo-economic potential, lasting peace is the most beneficial. Because it is impossible to bypass Russia in normal conditions, and it is not necessary, because it is unnatural” (Lukyanov, loc. cit., note 44).

⁶⁷ Kortunov, loc. cit., note 53.

⁶⁸ Address by the President of the Russian Federation, 24 February 2022, <http://en.kremlin.ru/events/president/news/67843>.

⁶⁹ Project on Nuclear Issues CSIS PONI, <https://nuclearussiaukraine.csis.org/#about>.

⁷⁰ Following the established formula: “We affirm that a nuclear war cannot be won and must never be fought” (The White House, Joint Statement of the Leaders of the Five Nuclear-Weapon States on Preventing Nuclear War and Avoiding Arms Races, 3 January 2022, www.whitehouse.gov/briefing-room/statements-releases/2022/01/03/p5-statement-on-preventing-nuclear-war-and-avoiding-arms-races/).

⁷¹ At the time, when asked about this, he put his earlier statement into a broader context of deterrence, concluding: “And we as the victims of an aggression, we as martyrs would go to paradise while they will simply perish because they won’t even have time to repent their sins” (Vladimir Putin Meets with Members of the Valdai Discussion Club. Transcript of the Plenary Session of the 15th Annual Meeting, 18 October 2018, <http://valdaiclub.com/events/posts/articles/vladimir-putin-meets-with-valdai-discussion-club>).

sense of the word”.⁷² In the months that followed, Trenin saw Russia’s nuclear target shifting from the US to Poland, which he perceived as the “main rear base of the Ukrainian conflict from the very beginning”.⁷³ This was apparently also intended to minimise Russia’s risk of a possible US retaliation, especially since Article 5 of the NATO Treaty, including the American nuclear umbrella over Europe, was “largely a political myth anyway”.⁷⁴

At that time, Karaganov – who would soon take the reins when it came to issuing threats of nuclear war – was still quite relaxed. If Russia had not been in the possession of nuclear weapons, he argued, “we would have been attacked a long time ago. And they still serve as a psychological fuse against a large-scale war.”⁷⁵ He also described the use of nuclear weapons as a “direct path to hell”. Although he, too, saw America’s extended nuclear deterrence as 99 percent untrustworthy, he nevertheless conceded: “Another thing is that one percent still remains, and it means hundreds of thousands of casualties on our side and a possible escalation to a general thermonuclear war. The psychological barrier that has kept mankind from major wars will be broken. So we must do everything possible to prevent it from coming to this.”⁷⁶

Yet in mid-2023 Karaganov as well Trenin pushed these reservations firmly aside. Karaganov’s awakening happened in June 2023 when he once again engineered a fundamental turnaround. In an article that was subsequently discussed under the title “A difficult but necessary decision”, he sharpened Trenin’s suggestions, lending them broader public appeal. From that point on, Karaganov began advocating the launch of a limited nuclear strike so as to prevent a larger war, as he claimed, but above all to put the West in its place as: “It becomes increasingly clear that a clash with the West cannot end, even if we win a partial or even a crushing victory in Ukraine.” The West, he argued, must be forced into a “strategic withdrawal”⁷⁷, something that can only be achieved with the help of nuclear weapons, “the result of divine intervention. God handed a weapon of Armageddon to humanity to remind those who had lost the fear of hell that it existed.”

In Karaganov’s opinion, it clearly follows that Russia has “to make nuclear deterrence a convincing argument again by lowering the threshold for the use of nuclear weapons set unacceptably high, and by rapidly but prudently moving up the deterrence-escalation ladder”. Much like television presenter and unrelenting war propagandist Vladimir Solovyev, who regularly urges Ukrainians living in possible Russian target areas to relocate, Karaganov likewise proposes, as a means of escalation, “urging our compatriots and all people of goodwill to leave their places of residence near facilities that may become targets for strikes in countries that provide direct support to the puppet regime in Kiev. The enemy must know that we are ready to deliver a pre-emptive strike in retaliation for all of its current and past acts of aggression.” This would then mark the final rung of the escalation ladder, although, unlike in 2022, Karaganov now asserts that any risk of “nuclear ‘retaliation’ or any other kind of attack on our territory” can be reduced to an “absolute minimum”. If, contrary to expectations, the calculation should fail, Karaganov proposes further escalating the conflict along the current trajectory – by “striking a series of targets in a number of countries in order to bring those who appear to have lost their minds to reason”.⁷⁸

Karaganov’s remarks do indeed position him in a prominent, highly visible position in the spectrum of Russian academic opinion, surpassed only by the orgiastic rituals of destruction that dominate the riotous programmes broadcast on Russian television – where, since the start of the war in 2022, cities like London, Paris or Berlin are frequently obliterated with nuclear weapons or where Russian troops are given a liberation mission up until the Atlantic. This essentially reveals one thing: his intellectual and moral bankruptcy. This is something he shares with Solovyev, who not surprisingly gave him his own exclusive television interview on his weekly talk show (where he otherwise only recycles the same old faces).

While it is not entirely clear who is calling the shots and who is merely following orders in this scenario, what is quite evident is that, with his nuclear rhetoric, Karaganov

⁷² Dmitry Trenin, Верните страх! (Bring back the fear!), 26 September 2022, <https://globalaffairs.ru/articles/vernite-strah>.

⁷³ Dmitry Trenin, Мысли о немыслимом: зачем Россия отправляет ядерное оружие в Белоруссию (Thoughts on the unthinkable: Why Russia is sending nuclear weapons to Belarus), 5 April 2023, <https://russiancouncil.ru/analytics-and-comments/comments/mysli-o-nemyslimom-zachem-rossiya-otpravlyayet-yadernoe-oruzhie-v-belorussiyu>. At the same time, he called for a move away from the “non-proliferation approach adopted by the US towards Iran and North Korea” (Dmitry Trenin, Специальная военная операция на Украине как переломная точка внешней политики современной России [The special military operation in Ukraine: A turning point in contemporary Russian foreign policy], 30 November 2022, <https://russiancouncil.ru/analytics-and-comments/comments/spetsialnaya-voennaya-operatsiya-na-ukraine-kak-perelomnaya-tochka-vneshney-politiki-sovremennoy-rossii>).

⁷⁴ Trenin, loc. cit., note 20.

⁷⁵ Karaganov, loc. cit., note 9.

⁷⁶ Sergey Karaganov, Это надо прямо назвать Отечественной войной (It should be called a patriotic war), 26 September 2022, <https://profile.ru/politics/sergey-karaganov-eto-nado-pryamo-nazvat-otechestvennoy-vojnoj-1167557>.

⁷⁷ This entails at least two elements, which Dmitry Trenin describes in more detail elsewhere: (1) a rapid end to the war in Ukraine on Russian terms, as: “Taking into account economic, social, psychological and other factors, Russia needs to win in a relatively short time – up to two years – in the future.” And (2) for the purpose of “geopolitical deterrence”, the prevention of a “hostile presence along the entire perimeter of Russia’s borders”. This would, however, extend to the borders of what is sometimes referred to as the “near abroad”, where Russia would have to create a “belt of security and cooperation [...] that would allow it to develop freely and successfully and actively interact with its neighbors”. This is, quite frankly, a Brezhnev doctrine mark 2.0 (Dmitry Trenin, Стратегическое сдерживание: новые контуры [Strategic deterrence: New contours], 1 July 2024, <https://russiancouncil.ru/analytics-and-comments/comments/strategicheskoe-sderzhivanie-novye-kontury>).

⁷⁸ Sergey Karaganov, Применение ядерного оружия может уберечь человечество от глобальной катастрофы (The use of nuclear weapons could save humankind from global catastrophe), Profil, 13 June 2023, <https://profile.ru/politics/primeneniye-yadernogo-oruzhiya-mozhet-uberech-chelovechestvo-ot-globalnoy-katastrofy-1338893>. Trenin explicitly agrees, in reaction to the article, with the following comment: “The main adversary should be sent an unambiguous – and no longer verbal – signal that Moscow will not play at giveaway and according to the rules established by the opposing side” (Dmitry Trenin, Украинский конфликт и ядерное оружие [The Ukrainian conflict and nuclear weapons], 20 June 2023, <https://globalaffairs.ru/articles/ukraina-yadernoe-oruzhie>). See also Dmitry Trenin, США играют в ядерную русскую рулетку — и доиграются (The U.S. is playing nuclear Russian roulette – and they are being reckless), 26 June 2023, <https://ria.ru/20230626/ruletk-a-1880366981.html>.

is perfectly positioned to assist the Kremlin in sharpening the nuclear threat towards the West. Hence, he was given the opportunity to moderate Putin's appearance at the Petersburg Economic Forum in June 2024, where he – and Putin – were once again eager to rhetorically press the nuclear button. But beyond Putin's verbal statements, Moscow also officially tightened the nuclear screws: by “de-ratifying” the nuclear Test Ban Treaty, deploying tactical nuclear weapons in Belarus, conducting demonstrative military readiness drills and, most recently, in mid-November 2024, by lowering the threshold for nuclear first-use in Russia's nuclear doctrine.⁷⁹ Previously, the threat to Russia's “survival” was considered the only acceptable reason for using nuclear weapons. Now, among other things, a “critical threat” to its sovereignty and/or territorial integrity – including threats to Belarus, its ally – would suffice.⁸⁰

It is equally obvious that Karaganov, with Trenin by his side, is pursuing his nuclear fantasies with a zeal that borders on obsession. Between mid-2023 and late 2024, hardly a week passed without one of them advocating a rapid ascent of the escalation ladder's 20 to 24 steps (as identified by Karaganov) to nuclear first-use against various NATO targets. The most notable development to date was the joint publication of a book by Karaganov, Trenin and Admiral Avakyan with the telling title “От сдерживания к устрашению”, which roughly translates into English as “From deterrence to intimidation”. This book is allegedly based on an expert assessment prepared for the Kremlin.

In the course of this, there was also a notable proliferation of potential targets, with Karaganov explicitly naming Frankfurt, Poznan, Bucharest and – in one instance – even the Reichstag in Berlin, though the latter would be targeted by a conventional attack.⁸¹ And should the US refuse to back down, its military bases would also come under threat: “Tens of thousands of American servicemen will die. Because of bases spread all over the world, Americans are two orders of magnitude more vulnerable than we are.” When asked what military advantage such a strike might

yield, however, Karaganov was only able to come up with the perfunctory response: “I don't fully know that. And nobody knows that. But I think NATO will fall apart and they'll all run in different directions.”⁸²

Apart from its focus on NATO and Poland, the aforementioned book, which contains some very explicit recommendations for escalation, devotes particular attention to Germany. According to the authors, Germany's involvement in Ukraine is quite clearly an attempt to “seek political and (indirect) military revenge for the Nazi Germany's defeat at the hands of the Soviet Union”. The book goes on to state: “As for Germany's possible attempts to acquire nuclear weapons (directly or through the EU) or get broader access to U.S. nuclear capabilities, Moscow should make it clear that it will definitely not tolerate that and will stop such attempts by force, up to the complete destruction of this country, which has brought so much trouble to Europe and the whole world.”⁸³

That said, – and this is remarkable given the current climate in Russia – Karaganov's original article, while eliciting explicit approval, also sparked at times quite fierce protest. Lukyanov and Timofeev's criticism was relatively moderate, however. Both essentially agreed with Karaganov's assessment that the nuclear factor had failed as a deterrent in the case of Ukraine. But they rejected his conclusion that this could be resolved through a preventive nuclear attack. In Lukyanov's words: “The game of nuclear peek-a-boo is a gamble. But if it fails, the net damage will be multiplied by any hypothetical benefits.”⁸⁴ While Lukyanov confined his response to (moderate) criticism, Timofeev went a step further, proposing an alternative to Karaganov's “highly dangerous” remedy – a continuation of the war of attrition: “Continue to live with the ‘bleeding wound’ of a hostile West and Ukraine. But understand that confrontation with Russia is also a ‘bleeding wound’ for the West, from which resources and political capital are drained.”⁸⁵

The criticism voiced by Moscow's most prominent and knowledgeable nuclear experts – most notably IMEMO's Alexey Arbatov – was far more scathing. Alongside General

⁷⁹ According to Trenin, this is “the final warning” (Dmitry Trenin, На Западе слишком много людей, считающих, что можно вести себя с Россией безнаказанно [There are too many people in the West who believe that it is possible to handle Russia with impunity], 26 September 2024, <https://russiancouncil.ru/analytics-and-comments/comments/na-zapade-slishkom-mnogo-lyudey-schitayushchikh-cto-mozhno-vesti-sebya-s-rossiye-beznakazanno>).

⁸⁰ At the annual Valdai forum in 2023, Putin still rejected such changes when Karaganov pointed to the matter: “I just don't see that we need to. There is no situation imaginable today where something would threaten Russian statehood and the existence of the Russian state” (Plenary session of the 20th anniversary meeting of the Valdai International Discussion Club, 5 October 2023, <http://en.kremlin.ru/events/president/news/72444>). When Karaganov once again raised the issue as moderator during Putin's appearance at the Petersburg Economic Forum in June 2024, he already moved on saying the doctrine was a “living instrument” and he did not want to “exclude the possibility” of “making changes to the doctrine” (Plenary session of the 27th St Petersburg International Economic Forum, 7 June 2024, <http://en.kremlin.ru/events/president/news/74234>).

⁸¹ The background to these planned targets – and his wrath against Europe – is the biographical detail that Karaganov was added to the EU sanctions list after the publication of his nuclear strike article and has, since then, been denied access to and prevented from reaping the financial benefits of his two apartments in Venice and Berlin. See Proekt (ed.), Advisory Board. A Guide on Putin's Experts, 20 December 2023, www.proekt.media/en/guide-en/putin-advisers; Julian Röppke, Putin-Hetzer verliert Wohnung in Berlin, 28 September 2024, www.bz-berlin.de/berlin/karaganov-putin-wohnung. And for his reaction to this: Sergey Karaganov, Нынешняя ядерная доктрина не выполняет функцию сдерживания (The current nuclear doctrine does not perform the function of deterrence), Kommersant, 11 September 2024, www.kommersant.ru/doc/7059257.

⁸² Rostovsky, loc. cit., note 24.

⁸³ Dmitry Trenin, Sergey Avakyan, Sergey Karaganov, From Restraining to Deterring: Nuclear Weapons, Geopolitics, Coalition Strategy, Moscow 2024, p. 82. The Russian version is not available online but an – unofficial – English translation of the book can be found under <https://karaganov.ru/en/from-restraining-to-deterring>. In relation to NATO, the book states: “Particular attention should be paid to possible strikes on Brussels, the seat of NATO and the European Union, which has been especially hostile towards Russia lately” (p. 81).

⁸⁴ Fyodor Lukyanov, Почему у нас не получится “отрезать Запад” с помощью ядерной бомбы (Why we can't “sober up the West” with a nuclear bomb), 21 June 2023, <https://globalaffairs.ru/articles/otrezvit-zapad>.

⁸⁵ Ivan Timofeev, Превентивный ядерный удар? Нет (Preemptive nuclear strike? No), 19 June 2023, <https://russiancouncil.ru/analytics-and-comments/analytics/preventivnyy-yadernyy-udar-net>. See also Timofeev, Нельзя играть в “конец истории”. Мы же хотим выиграть, а не самоуничтожиться! (We can't play “end of history”. We want to win, not self-destruct!), 28 August 2023, <https://russiancouncil.ru/analytics-and-comments/comments/nelzya-igrat-v-konet-istorii-my-zhe-khotim-vyigrat-a-ne-samounichtozhitsya>.

Vladimir Dvorkin, Arbatov played a key role in what was an unprecedented move: a protest resolution issued by a total of 21 members of the Council on Foreign and Defence Policy (SVOP), which Lukyanov published on the SVOP's official website. The resolution pulled no punches: "To hope that a limited nuclear conflict can be managed and prevent it from escalating into a global nuclear war is the height of irresponsibility. This means that the destruction of tens and maybe even hundreds of millions of people in Russia, Europe, China, the United States, and other countries is at stake. This is a direct threat to humanity in general." It continued: "It is inadmissible to create in society, through pseudo-theoretical arguments and emotional statements in the style of so-called 'talk shows', such sentiments that could push for catastrophic decisions."⁸⁶

Two in-depth articles on the nuclear question published by Arbatov in 2022 and 2023 are equally scathing in their criticism. He bemoans the "targeted campaign mounted by certain professionals in the Russian media" and sums up his criticism of Karaganov's article with the remark: "But most hilarious of all is the dream that 'through all the thorns and traumas' of nuclear warfare one can arrive at a 'bright future' (on radioactive ruins?)."⁸⁷ There is no doubt in Arbatov's mind that any use of nuclear weapons would "in all probability" escalate into a "global disaster" – a scenario that would have devastating consequences for Russia itself: "It would be Russia's worst and irreversible defeat in its thousand-year-long history since it would mean physical elimination of the Russian people, their state, and habitat. Russian leaders repeatedly noted the disastrous nature of this scenario. It would become an incomparably greater disaster than the Mongol invasion, the Time of Troubles (of the early XVII century), the collapse of Tsarist and Soviet empires when Russia had a chance to revive again and again."⁸⁸ Unfortunately, Karaganov and Trenin remain resolute, as seen in their continued relentless pursuit of these activities to this day.

Finland and Sweden – NATO expansion as a "self-fulfilling prophecy"

"Of course, the accession of Finland and Sweden to NATO is bad news for us. At least from the symbolic point of view." This was Fyodor Lukyanov's response to the decision of what had traditionally been two neutral states to join

NATO, a process which was set in motion in May 2022, shortly after Russia's large-scale invasion of Ukraine.⁸⁹ This statement somewhat underplays the situation. The move was in fact a bitter defeat for Russian policy, as Moscow had, in December 2021, proposed a draft treaty calling for the rejection of "any and all" expansion of NATO. This underscores the extent to which Russia's political influence has diminished due to the war in Ukraine – a trend that mirrors its declining influence in the South Caucasus and, more dramatically, in the Middle East.

Given that, since invading Ukraine, Moscow has lost both the diplomatic leverage and military means to prevent Finland and Sweden – unlike Ukraine – from joining NATO, it is left with no choice but to downplay the consequences, while clinging to its fundamental rejection of NATO and its expansion. In fact, Putin's reaction was rather restrained. He emphasised that Russia had "no problems with these states. No problems at all!", adding: "In this sense, therefore, there is no direct threat to Russia in connection with NATO's expansion to these countries." The potential expansion of NATO's "military infrastructure" alone required a response from the Russian side. In the same breath, however, Putin reiterated that NATO itself was a despicable alliance: "Generally, NATO is being used, in effect, as the foreign policy tool of a single country, and it is being done persistently, adroitly, and very aggressively. All of this is aggravating the already complex international security situation."⁹⁰

For the Russian discourse, the more fundamental question was why Finland and Sweden wanted to join NATO, as well as the consequences and especially the question of how to respond appropriately. As usual, opinions are divided.

Only a small number of commentators were willing to admit that Finland and Sweden wanting to join NATO was a direct consequence of the war in Ukraine. Deputy Chairman of the Federation Council Konstantin Kosachev argued that the shift in opinion was solely the result of "media hysteria" in the West. In his upside-down world, it became quite apparent, he suggested, just "how right the Russian side was to see an immediate threat to European security in continuing to try to draw all countries around Russia's perimeter into NATO at any cost".⁹¹ Andrey Kortunov, on the other hand, posed the "uncomfortable" but far more plausible question: "If Helsinki and Stockholm are allowed to relin-

⁸⁶ О Призывах К Развязыванию Ядерной Войны (Calls to launch a nuclear war), Statement by members of the Council on Foreign and Defense Policy, 13 July 2023, <https://svop.ru/main/48156>.

⁸⁷ Alexey Arbatov, Ядерные метаморфозы (Nuclear metamorphosis), 7 August 2023, <https://russiancouncil.ru/analytics-and-comments/analytics/yadernye-metamorfozy>.

⁸⁸ Alexey Arbatov, Украинский Кризис И Стратегическая Стабильность (The Ukrainian crisis and strategic stability), 18 July 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/the-ukrainian-crisis-and-strategic-stability>.

⁸⁹ Fyodor Lukyanov, Правила перестали действовать совсем (The rules have stopped working altogether), 20 June 2022, Business Online, <https://globalaffairs.ru/articles/pravila-pere-stali-dejstvovat>.

⁹⁰ CSTO summit, The Kremlin hosted a meeting of the heads of state of the Collective Security Treaty Organisation, 16 May 2022, <http://en.kremlin.ru/events/president/news/68418>. The Foreign Ministry, however, reacted more harshly, accusing Helsinki of causing "serious" damage to bilateral relations, claiming a direct violation of its contractual obligations vis à vis Russia and announcing, without referring to military infrastructure, "retaliatory steps" (Russian Foreign Ministry statement on Finland's membership in NATO, 12 May 2022, https://mid.ru/ru/press_service/spokesman/official_statement/1812971).

⁹¹ Konstantin Kosachev, Швеция и Финляндия сделали выбор в пользу конфронтации (Sweden and Finland opt for confrontation), 18 May 2022, Parlamentskaya Gazeta, <http://svop.ru/main/41978>.

quish this status without asking the Kremlin for approval, why is Kiev prohibited from doing so?”⁹²

Unlike Kosachev, Lukyanov at least concedes that both countries were “really scared”, though he goes on to say: “We in Russia understand that Ukraine is a special case, and there is no reason to expect that something similar to what is happening there now will be applied to another country.”⁹³ However, this was also true right before the Ukraine adventure. In another twist, Lukyanov attributes the desire to join NATO primarily to a “value radicalization” that has spread in the West, “on the wave of euphoria following the victory of the Cold War, when the ‘right side of history’ approach prevailed”.⁹⁴ Apparently what he means by this cryptic observation is that people have become accustomed to what he sees as an “anomalous period in terms of history of international relations, when Europe came to the conclusion that a balance of the classical type is not needed”.⁹⁵ In retrospect, he links his cherished “balance” to the “Finlandisation” that, in his view, despite “certain restrictions to freedom of action” is a “model for a productive compromise between states with different socio-political systems” which was “advantageous for everyone”.⁹⁶ If you favour Brezhnev’s principle of limited sovereignty for smaller states, this undoubtedly applies – but only then.

A particularly pointed – and as historically distorted as it is perfidious – interpretation of “Finlandisation” is offered by Timofey Bordachev, another of Karaganov’s close associates and member of the Valdai Club. In his view, Finland’s “prudence” only came about as a result of the dramatic losses suffered between 1918 and 1944, after the “folly of romantic nationalism plunged the country into a conflict with their vast eastern neighbour”. His explanation for both Finland’s and Sweden’s desire to join NATO is similarly extravagant – he claims it is no more than a diversionary tactic intended to distract from the growing social problems in both countries.⁹⁷

The end of “Finlandisation”, once seen as a workable compromise between the East and the West, may be something to regret, like Lukyanov, but the fate of Ukraine reveals that neutrality – contrary to Russian insinuations – is anything but a security guarantee. Moreover, the way Andrey Kortunov

sees it, the ninth round of NATO enlargement vividly illustrates the “continued consolidation of the collective West”, turning the geopolitical situation in Northern Europe “upside down” and, at least for the foreseeable future, marking a return to the “unipolar world of the early 21st century”.⁹⁸ The border between Russia and NATO is now 1,340 kilometres longer, but more importantly, at least according to Kortunov, “the Baltic Sea has essentially become an inland lake for NATO”, effectively making “the Alliance a closed circle”.⁹⁹

The question that remains is how Russia should respond to the situation. Kortunov clearly advocates rapprochement. He draws a distinction between a (confrontational) “Baltic” and a (cooperative) “Scandinavian” NATO model. The latter, exemplified by Norway and Iceland, is characterised by the fact that, “for decades, relations between Norway and Russia were, in many respects, better than those with their neutral neighbour Sweden”. Finland and Sweden have yet to decide which model to follow, meaning Russia’s response is all the more significant. Kortunov’s preference here speaks for itself: “This episode should not be allowed to cast a long shadow over the future of relations with Helsinki and Stockholm and to close the possibility of their restoration not only in the near, but also in the medium term.”¹⁰⁰

The nuclear fan club, on the other hand, has a very different view, arguing that: “Russia’s strategic deterrence in Northern Europe targets the leadership of NATO countries, their ruling classes and societies. [...] Russia should use expert discussions to warn the ruling circles of NATO countries, including newly admitted members, about the obvious, namely that their membership in the alliance does not guarantee their security but, on the contrary, increases the likelihood of nuclear strikes on them.”¹⁰¹

Donald Trump: Wavering between hope and disillusionment – and a new beginning

Trump’s first term of office ended in bitter disappointment for Russia. Despite his open support for Putin at the start, all Russia ended up with was a significantly tightened sanctions

⁹² Andrey Kortunov, ДВЕ МОДЕЛИ НАТО (Two NATO models), 19 May 2022, Kommersant, <http://svop.ru/main/41990>.

⁹³ Lukyanov, loc. Cit., note 89.

⁹⁴ Fyodor Lukyanov, Швеция и Финляндия - пример государств, которые по принципиальным соображениям придерживались линии нейтралитета. Теперь переосмысления не избежать (Sweden and Finland are examples of states that, as a matter of principle, adhered to the line of neutrality. Now a rethink is inevitable), 5 April 2023, <https://russiancouncil.ru/analytics-and-comments/comments/shvetsiya-i-finlyandiya-primer-gosudarstv-kotorye-po-printitsipialnym-soobrazheniyam-priderzhivalis-li>.

⁹⁵ Fyodor Lukyanov, Без нейтральной полосы: что изменит вступление Швеции и Финляндии в НАТО (No more neutral zone: The impact of Sweden and Finland’s accession to NATO), 18 May 2022, Rossiiskaya Gazeta, <https://globalaffairs.ru/articles/bez-nejtralnoj-polosy>.

⁹⁶ Lukyanov, loc. Cit., note 94.

⁹⁷ Timofey Bordachev, Зачем финнам и шведам клетка НАТО (Why Finns and Swedes need a NATO cage), 13 May 2022, Vzglyad, <http://svop.ru/main/41943>. This aligns with his broader assessment of NATO: “The central mission of NATO is to preserve the internal political inviolability of the ruling regimes in the participating countries” (Timofey Bordachev, SCO, NATO and the Fate of International Cooperation, Part 1, 19 August 2024, <https://valdaiclub.com/a/highlights/sco-nato-and-the-fate-of-international-cooperation>).

⁹⁸ Andrey Kortunov, NATO’s Cheek by Russia’s Jowl, 17 May 2022, <https://russiancouncil.ru/en/analytics-and-comments/analytics/nato-s-cheek-by-russia-s-jowl>.

⁹⁹ Oksana Grigorieva, The Price of Abolishing Sweden’s Two Hundred Years of Neutrality, 1 February 2024, <https://valdaiclub.com/a/highlights/the-price-of-abolishing-sweden-s-two-hundred-years>. Even when it came to the expansion of NATO infrastructure, in the shadow of the Ukraine War, the reaction was initially cautious, see Sergey Andreev, Юбилей НАТО-75: что дальше? (NATO at 75: What’s next?), 19 July 2024, <https://russiancouncil.ru/analytics-and-comments/analytics/yubiley-nato-75-chto-dalshe>.

¹⁰⁰ Kortunov, loc. cit., note 92. Professor Konstantin Khudoley of St. Petersburg State University and once Russian co-chair of the Working Group on Politics of the German-Russian Petersburg Dialogue offers a similar argument: “When criticising the decision of Sweden and Finland, it is advisable to refrain from threats, or sharp and rude attacks” (Konstantin Khudoley, Finland and Sweden Joining NATO: The Game Is Afoot, 27 May 2022, <https://valdaiclub.com/a/highlights/finland-and-sweden-joining-nato-the-game-is-afoot>).

¹⁰¹ Trenin, Avakyants, Karaganov, loc. cit., note 83, p. 81.

regime and the first delivery of “lethal” weapons to Ukraine.¹⁰² Given this experience, expectations for Trump’s second term remained consistently muted. The fact that, during his election campaign, Trump had questioned support for Ukraine, contemplated a ceasefire at Ukraine’s expense and raised NATO as a problem was once again met with explicit approval from Moscow. That said, Russia still had its doubts about what would actually come of this after his inauguration.

Nevertheless, Trump undeniably represents the “national” forces that – unlike the ruling elites in the West – some Russian protagonists, including Dmitry Trenin, have pinned their hopes on: “Trump’s victory is a strong blow to the left-liberal agenda of the globalist forces of the political West as a whole. Right-wing nationally oriented forces in Europe, both ruling (Hungary) and opposition (France, Germany), have gained a powerful ally. This, of course, is not the end of liberal globalism, but at least its temporary forced rollback.”¹⁰³

On the one hand, there is hope that this might serve as a catalyst, dismantling the consolidation of the West that Kortunov diagnosed in 2022 – a hope also shared by Andrey Sushentsov, Dean of the (most important) Faculty of International Relations at the Moscow State Institute of International Relations (MGIMO) and Valdai Club Programme Director. Indeed, during the 2024 US presidential election campaign, Sushentsov had already identified, in Donald Trump, a number of hybrid strategies to weaken the Western alliance: “If the U.S. elections give a result that suddenly creates confusion, then the key thing will suffer - trust. I believe that if Russia can influence this, then it is reasonable to think about it.”¹⁰⁴ On the other hand, at the beginning of 2025 and before his inauguration it was still unclear to what extent Trump would adhere to such “national” and “pragmatic” standards in his second term, not least because it remains uncertain how much this “national” concept actually corresponds with Moscow’s interests. Thus, it was the ostensibly “national” forces that pushed for NATO membership in Finland and Sweden or who so vehemently opposed Russia in Poland. When it comes to Orbán, Fico and the like, “national” interests achieved little more than improved relations with Moscow – and even that had its limits.

However, the excitement was all the greater when Trump, barely in office, actually made unprecedented strides to-

wards Moscow. In Lukyanov’s view, this meant that Trump’s return to office had indeed ushered in a “new era of world politics”.¹⁰⁵ And following the initial telephone conversations between Trump and Putin in February 2025, he even spoke of a “rebirth of diplomacy”. While in the past, the US – and the West as a whole – had always just imposed unilateral conditions on Moscow, it now looked as if Trump had “embraced the Russian approach in principle”. However, Sushentsov, among others, cautioned against allowing this “honeymoon period” to obscure the fact that in the “everyday life” that would follow, both sides would “inevitably face some serious disappointments”.¹⁰⁶

Only Alexander Dugin expressed his unbridled enthusiasm from the very outset, unreservedly praising Trump as a staunch opponent of the globalists and the “left-leaning liberal hegemony (Clinton, Neocon Bush Jr., Obama, Biden)”. For Dugin, Trump represented a unique “opportunity”: “I think we should be selective about Trump. Now is the time to finish off the liberals from both sides, primarily the European liberal elites – Trump is their mortal enemy.”¹⁰⁷ But Dugin had been similarly euphoric at the start of Trump’s first term, supporting him “whole-heartedly” because, in Dugin’s words, he was changing the “direction of hundreds of years of American imperialist tradition”, allowing “our leaders to unite and make our countries great again”.¹⁰⁸ As we know, nothing came of this, but that did little to shake Dugin’s confidence in Trump’s conservative-revolutionary instincts – bolstered by his enthusiasm for MAGA ideologues like Steve Bannon, whom he seamlessly assimilated into his own global fascist fantasies.¹⁰⁹

Dugin’s enthusiasm, however, did not meet with unanimous support even in the Izborsky Club. Literary fascist Zakhar Prilepin, for instance, had quite a different view and mocked Trump in his own distinctive, malicious way: “Of course, ‘our redhead, our elephant’, as we say about Trump, is already playing. But he will not play for Russia - calm down already.” He did not expect any kind of positive change for Russia: “Rather, it will be the destruction of all our illusions. Therefore, I recommend parting with misconceptions in advance – nothing good awaits us with Trump at the head of the United States.”¹¹⁰

¹⁰² Hans-Joachim Spanger, *Russland: Das Trauma der Trump-Administration*, in: Christoph Daase and Stefan Kroll (eds.), *Angriff auf die liberale Weltordnung. Die amerikanische Außen- und Sicherheitspolitik unter Donald Trump*, Wiesbaden: Springer, 2019, pp. 123–150.

¹⁰³ Dmitry Trenin, *После инаугурации Трампа должен, вероятно, последовать звонок главе Российского государства* (After Trump’s inauguration, a call to the head of the Russian state is likely to follow), 4 December 2024, <https://russiancouncil.ru/analytics-and-comments/comments/posle-inauguratsii-trampa-dolzhen-veroyatno-posledovat-zvonok-glave-rossiysko-gosudarstva>. Similarly, Andrey Sushentsov: *The Ukrainian Crisis as a Testing Ground for American Strategy*, 17 January 2025, <https://valdaiclub.com/a/highlights/the-ukrainian-crisis-as-a-testing-ground>. He had therefore called for an active intervention in the US election campaign.

¹⁰⁴ Andrey Sushentsov, *Trump 2.0: What Can We Expect from US Foreign Policy after the Elections?*, 5 July 2024, <https://valdaiclub.com/a/highlights/trump-2-0-what-can-we-expect-from-us>.

¹⁰⁵ Fyodor Lukyanov, *Here’s What Trump 2.0 Means For the US and Russia*, 27 January 2025, <https://eng.globalaffairs.ru/articles/trump-2-0-lukyanov>.

¹⁰⁶ Fyodor Lukyanov, *Первое свидание, опасная игра и два плохих пути: Как пройдут переговоры России и США* (First date, dangerous game and two bad paths: How the Russia-US talks will go), *Komsomolskaya Pravda*, 17 February 2025, www.kp.ru/daily/27660/5049034.

¹⁰⁷ Alexander Dugin, *Трам — это возможность* (Trump is an opportunity), 2 December 2024, <https://izborsk-club.ru/26380>. In Dugin’s view, there is no doubt that he is “eliminating” liberalism in the US: Alexander Dugin, *Суверенное сердце и трибунал над либералами* (The sovereign heart and the tribunal over the liberals), 24 December 2024, <https://izborsk-club.ru/26448>.

¹⁰⁸ Alexander Dugin’s Interview with Alex Jones, 10 February 2017, video interview script, <http://katehon.com/article/alexander-dugins-interview-alex-jones>.

¹⁰⁹ Alexander Dugin, *Стив Бэннон — идеологический архитектор трампизма* (Steve Bannon – the ideological architect of Trumpism), 20 February 2025, <https://izborsk-club.ru/26644>.

¹¹⁰ Zakhar Prilepin, *Пусть иллюзии рассеются* (Let the illusions dissipate), 20 November 2024, <https://izborsk-club.ru/26331>.

This was something that the moderate analysts Alexander Dynkin, Ivan Timofeev and Andrey Kortunov took a similar, albeit more nuanced view on – or at least they, too, expressed scepticism at the start. They pointed to limiting factors such as the “anti-Russian democrats, officials and business leaders”¹¹¹, the long-standing “cross-party consensus” on hostility towards Russia¹¹², and to Biden’s prudence compared to Trump’s appetite for risk: “The former tried to outmaneuver his opponents, the latter will try to bully them.”¹¹³

However, Andrey Kortunov, in particular, seized the opportunity to relax the Russian discourse when Trump demonstratively shifted his focus away from Ukraine (and Europe) to Moscow. In a series of opinion pieces between late February and early April 2025, he called for a fundamental reassessment of the Russian narrative, which ranged from the concept of the “collective West” and the dominance of the confrontational “Anglo-Saxons” to the European continental powers and the antagonism between the “collective West” and the “global majority”. He also appealed for the notion of a “historical predestination and fatal inevitability of a bitter confrontation between Russia and the United States” to be abandoned.¹¹⁴ Bearing this in mind, there was no doubt, in Kortunov’s mind, that the diplomatic opening created by Trump’s presidency be used. This stood in stark contrast to the many voices in Moscow, which, even after the clear signs of mutual rapprochement, continued to warn first and foremost about the risks and especially the “trap” set by Trump.¹¹⁵

The litmus test, and this is something all commentators agree on, is the war in Ukraine – even though the Kremlin’s negotiating strategy involves attempts to separate resuming relations with Washington from settling the war. As we know, Trump notoriously claimed he would end the war within 24 hours. Although, once in office, he failed to achieve this, it still remained a priority for White House diplomacy. Until Trump took office, scepticism had prevailed even among those Russian commentators who supported a diplomatic settlement. In Kortunov’s view, therefore, even at the end of 2024, Trump’s position remained “extremely vague”.¹¹⁶ As to Timofeev, he believed a settlement would

essentially only be possible when the “objective conditions are ripe for resolving the conflict, including, for example, the depletion of resource capabilities to wage the conflict or a decisive victory for Russia”.¹¹⁷ At the time, bellicists like Trenin distanced themselves even further, seeing no prospect of Trump yielding to Russian interests – and fundamentally ruling out the US as a mediator: “Moscow has its own vision of resolving the Ukrainian crisis – through the elimination of the causes that led to it. [...] These, by the way, are not questions for the United States, which is required to stop participating in the war in Ukraine in any form. The subject of theoretically possible negotiations with the United States (after its withdrawal from the Ukrainian theater of operations) is the military-political situation in Europe and in the world.”¹¹⁸

This accurately reflects the Kremlin’s position, as articulated in March, April and May 2025 during talks with the US on a ceasefire, where Moscow time and again rejected general ceasefires proposed by the US and Ukraine. This was by no means a matter of mere “nuances”, as Putin insinuated, but rather a principled stance. Citing its pursuit of a long-term solution that would address the “root causes” of the “conflict”, Moscow made it quite clear that, for the time being, it had no intention of accepting any interim solution that fell short of its own war objectives – as declared on 14 June 2024.¹¹⁹ This official line was even upheld by some of the commentators – like Ivan Timofeev – who were generally more open to compromise. Timofeev faithfully reproduced the Kremlin’s entire catalogue of demands and in addition made it clear that any presence of NATO troops intended to secure a ceasefire – as proposed by Paris and London – would be “unacceptable” to Moscow. This hardened position appears to stem from the perceived lack of alternatives for Ukraine and the West, as Trump is aware “that there is no prospect of military victory over Russia”.¹²⁰

Kortunov, in contrast, cautions against the risks associated with such a “wait-and-see” approach – which emanates from the assumption that “time is on Russia’s side” and that a “slow, controlled dialogue – supported by growing leverage on the battlefield – is the smarter path to final negotia-

¹¹¹ Alexander Dynkin, Кадровая политика Трампа внушает умеренный оптимизм (Trump’s personnel policy inspires moderate optimism), 4 December 2024, <https://russiancouncil.ru/analytics-and-comments/comments/kadrovaya-politika-trampa-vnushaet-umerennyi-optimizm>. Dugin, in contrast, blamed these forces for the failure to achieve the promised anti-liberal breakthrough in Trump’s first term (Alexander Dugin, Трамп и новая геополитическая карта [Trump and the new geopolitical map], 21 August 2017, <https://izborsk-club.ru/13895>).

¹¹² Ivan Timofeev, Дональду Трампу вряд ли удастся развернуть ситуацию в сторону компромиссов (Donald Trump is unlikely to be able to turn the situation towards compromise), 13 August 2024, <https://russiancouncil.ru/analytics-and-comments/comments/donald-trampu-vryad-li-udastya-razvernut-situatsiyu-v-storonu-kompromissov>.

¹¹³ Andrey Kortunov, Trump: What Can We Expect? 12 December 2024, <https://russiancouncil.ru/en/analytics-and-comments/analytics/trump-what-can-we-expect>.

¹¹⁴ Andrey Kortunov, Договорняк или разумный компромисс (An agreement or a reasonable compromise), Kommersant, 19 February 2025, www.kommersant.ru/doc/7515949. Ibid., Пора задуматься о новых нарративах (It is time to think about new narratives), Kommersant, 26 February 2025, www.kommersant.ru/doc/7533981.

¹¹⁵ Andrey Kortunov, The Grand Bargain: Can Russia and the US rewrite history?, 24 February 2025, <https://russiancouncil.ru/en/analytics-and-comments/comments/the-grand-bargain-can-russia-and-the-us-rewrite-history>.

¹¹⁶ Andrey Kortunov, Российско-американские отношения после избрания Дональда Трампа (Russian-American relations after the election of Donald Trump), 20 November 2024, <https://russiancouncil.ru/analytics-and-comments/comments/rossiysko-amerikanskije-otnosheniya-posle-izbraniya-donald-trampa>.

¹¹⁷ Ivan Timofeev, Trump or Harris? Moscow Does Not Care, 16 August 2024, <https://valdaiclub.com/a/highlights/trump-or-harris-moscow-does-not-care>.

¹¹⁸ Trenin, loc. cit., note 103.

¹¹⁹ As articulated by Putin at a joint press conference with Alexander Lukashenko on 13 March 2025 in Moscow, <http://en.kremlin.ru/events/president/news/76450>.

¹²⁰ Ivan Timofeev, Без учета требований России вряд ли удастся избежать нового витка противостояния в будущем (If Russia’s demands are not taken into account, we will be unlikely to avoid a new round of confrontation in the future), 10 March 2025, <https://russiancouncil.ru/analytics-and-comments/interview/bez-ucheta-trebovaniy-rossii-vryad-li-udastya-izbezhat-novogo-vitka-protivostoyaniya-v-budushchem>.

tions”.¹²¹ It is precisely this approach which HSE’s Dmitry Suslov, staunchly advocates. From his perspective, Russia could easily afford to “continue the conflict and achieve the objectives of its special operation by military means”; for Ukraine, on the other hand, a ceasefire is the only viable option. But in order to avoid unnecessary complications, Russia would not be well advised to reject the US proposals outright. The willingness to compromise should, however, be tied to two non-negotiable conditions: the suspension of all arms deliveries from the West and the inclusion of the fundamental principles of a peace settlement in any ceasefire agreement.¹²² This aligns with the basic position of Suslov’s boss at HSE, Sergey Karaganov, who had already voiced the bellicist slogan at the end of 2024: “Regardless of who sits in the White House, we need to pursue our line, set our goals and achieve them. Naturally, maneuvering and adapting to certain challenges along the way.”¹²³

In a similar vein, another of Karaganov’s associates, Fyodor Lukyanov, also reiterates that Russia should under no circumstances be swayed by Washington’s siren songs – and he means this on a very fundamental level. Although he welcomes the unexpected “ideological harmony” between Moscow and Washington – and based on Moscow’s demands at that – he is still keen to maintain a distance. Since the world, and especially the “global majority”, is increasingly moving away from Western dominance, Russia’s future is heading in the same direction. A return to “business as usual with the West”, he argues, would only serve to “reinforce the Cold War mindset”.¹²⁴

The “global majority” and China: How Russia plans to put NATO on the defensive

Immediately after Russia launched its war of aggression on Ukraine, the “collective West” – embodied by NATO and its partners in Asia – largely severed relations with Russia. This dramatic shift in the international landscape has become the most defining structural feature of Russia’s foreign relations and has prompted a similarly fun-

damental realignment that combines both defensive and offensive elements. On the one hand, Moscow’s goal is pragmatic – to assert its position by neutralising the economic sanctions imposed by the West and overcoming the political isolation the latter seeks to impose. On the other hand, this – forced – realignment is seen by Moscow as an opportunity, both economically and politically. The formation of tactical coalitions and stable alliances is as important as securing influence and projecting power. To this end, alternative institutions such as the BRICS and the Shanghai Cooperation Organization are instrumental – serving, in Russia’s view, as anti-Western platforms. Yet the opportunities, in particular, are seen quite differently in the Russian debate. And here, one concept – the “global majority” – and one country – China – take on central importance.

The term “global majority” was, as far as can be gleaned from publicized opinion, coined by Fyodor Lukyanov and, over the course of 2022, found its way into Moscow’s official parlance. Since then, the term has been widely used to imply Russia’s stable position in the international community – while also suggesting the marginalisation of the “global minority”, in other words the “collective West”. The term was counterintuitive in that the votes on the war in Ukraine held in the UN General Assembly consistently resulted in disastrous outcomes for Russia. And, at least at the start of the war, Russia had no allies besides Belarus, with Iran and North Korea only later joining forces with Russia to form a veritable “Axis of Evil”. Hence Lukyanov’s observation in June 2022: “As for our allies, this is also a difficult question. Rather, we can say that there are countries that are sympathetic to the reasons for what is happening, although they do not necessarily approve of what Russia is doing. [...] I think there are a majority of such countries in the non-Western world.”¹²⁵ And this “majority” nurtures sympathies and allegiances “because the inhabitants of the former ‘third world’ consider it correct and historically irreversible to oppose the former colonial rulers” – thus introducing another popular topos into official discourse.¹²⁶ As is often the case, Karaganov takes this

¹²¹ Andrey Kortunov, Trump’s deal window: Will Moscow seize the moment? 1 April 2025, <https://russiancouncil.ru/en/analytics-and-comments/comments/trump-s-deal-window-will-moscow-seize-the-moment>.

¹²² Dmitri Suslov, “У нас сильные карты на руках” Как Россия ответит на предложения США по перемирию и каковы перспективы конфликта на Украине? (“We have a strong hand” How will Russia respond to US proposals for a truce and what are the prospects for the conflict in Ukraine?), 13 March 2025, <https://lenta.ru/articles/2025/03/13/d-suslov>.

¹²³ Sergey Karaganov, Бить Ядерным Оружием По Украине Было Бы Ошибкой. Отвечать Надо Сразу По Западу (A nuclear strike on Ukraine would be a mistake. We need to respond to the West immediately), BUSINESS Online, 24 November 2024, www.business-gazeta.ru/article/655229.

¹²⁴ Fyodor Lukyanov, Игра вдолгую: почему Россия не должна поддаваться соблазну закрутить “новый роман” с Соединёнными Штатами (The long game: Why Russia should resist the temptation to start a “new romance” with the United States), Profil, 24 February 2025, <https://profile.ru/abroad/igra-vdolguju-pochemu-rossiya-ne-dolzha-poddavatsya-soblaazu-nu-zakrutit-novyy-roman-s-soedinennymi-shtatami-1665677>. Duma member Vyacheslav Nikonov strikes a similar tone, “Нам Нужно Строить Новый Мир Без Оглядки На Запад” (“We need to build a new world without a backward glance at the West”), SVR Magazin Razvedchik, 18 April 2025, <https://svop.ru/mains/59962/#more-59962>.

¹²⁵ Lukyanov, loc. cit., note 89. Soon after this, Karaganov attributed the term to Lukyanov, while describing what had, until then, been the more widely used term “non-West” as evidence of our “typical Western-oriented mindset and language” (Karaganov, loc. cit., note 39). Later, Lukyanov extended the “global majority” to include the G7 countries, where in most cases the governing parties had such low (approval) ratings that they only represented “the interests of a small section of the population”. In his view, the concept of the “global majority” thus captured “the parallel trajectory of the processes observed in the individual states and on a global scale” (Fyodor Lukyanov, Большинство большинства [The majority of the majority], 25 December 2023, <https://russiancouncil.ru/analytics-and-comments/comments/bolshinstvo-bolshinstva>).

¹²⁶ Fyodor Lukyanov, Справедливость – понятие не универсальное (Justice is not a universal concept), 2 November 2022, <https://globalaffairs.ru/articles/spravedlivost-ne-universalna>. Lukyanov argues that Russia’s role as the “flagship of this decidedly anti-colonial campaign” presents at least two challenges: (1) the “paradox” of Russia fighting to “at least partially restore its former imperial borders” (Fyodor Lukyanov, Неожиданный индикатор перемен. Россия становится флагом антиколониального похода [An unexpected indicator of change. Russia becomes flagship of anti-colonial campaign], 1 July 2022, <https://globalaffairs.ru/articles/indikator-peremen>). And (2) the dilemma – “a task of truly historical complexity” – of having to offer the recipient countries in the Global South “entirely practical benefits of interaction” (Lukyanov, Справедливость ..., ibid.). This especially pertains to development aid, a topic on which Karaganov, in keeping with post-Soviet Russia’s minimal contributions, disparagingly remarked in 2021: “The Soviet Union supported a huge number of countries in the Third World which had committed to a ‘socialist alignment’ [...] These are now on the hunt for new donors, including NATO” (Karaganov, loc. cit., note 9).

further, confidently noting: “As for the fact that we have no allies, we are supported, if not in the UN, in fact by the majority of humanity. The world’s majority. And this is quite obvious.”¹²⁷ This is hardly surprising since, in his eyes, Russia is “[a] liberator of nations, guarantor of peace and military-political core of the World Majority. This is our destined role.”¹²⁸

Although, as Dmitry Trenin acknowledges, there are certainly “complexities, contradictions and even elements of rivalry”, and as a result, relations with Russia also differ, “in general the Global Majority has become the most important and valuable resource of modern Russian foreign policy. The Soviet Union did not have such a powerful potential resource during the Cold War.”¹²⁹ Even before his patriotic shift, Trenin had proposed, in 2021, “closer, including de facto allied relations with key non-Western countries, primarily China, but also with Iran, as well as with U.S. opponents in the Western Hemisphere – Venezuela, Cuba and Nicaragua”.¹³⁰ At the start of the war, however, he was still sceptical about what could be expected from such “close” relations: “In these conditions Russia should not count on substantial assistance and support from non-Western partners – their de facto neutrality, i.e. non-participation in anti-Russian sanctions, will suffice. Basically, it will have to rely on its own strength.”¹³¹

Today, the “global majority” is associated with certain hopes but, as we have seen, it also carries certain illusions. Ivan Timofeev refers to the latter when he critically observes: “There is an illusion that the global majority—the world majority—is a consolidated bloc that wants to free itself from the ‘yoke of the West’.”¹³² We are allegedly the vanguard, and we are looked upon as a beacon of light. I would be only glad if this were true, but unfortunately while working closely with others from world majority nations, I realize that it is not the case. These countries also have different elites, different movements.” A further complicating factor is that Russia is the only major country in direct conflict with the West but “unfortunately, this struggle for rights or for fairer positions is not shared by the global majority currently”. To some extent, this also applies to China, a country that is in many ways indispensable for Russia but also somewhat unsettling: “If we take China, there is

a part of the Chinese elite that is quite solidly integrated into global supply chains and financial transactions; it is not pro-Western, but it is more globalist. There are also a more nationally oriented elites who have their own movements, their own internal competing ideas over the direction of China’s foreign policy.”¹³³

While Moscow sees itself in the driving seat when it comes to the “global majority”, it tends to consider itself in an inferior position relative to China – although, as is the case with other matters of this kind, this is of course not something it will openly admit. For Russia, China is indispensable – as a market for its raw material exports, a supplier of both civilian and war-essential goods, and as an ally on the world stage. The numbers speak for themselves: before the war, China’s total trade with Russia amounted to 139 billion USD, whereas in 2022 it had risen to 190 billion, increasing to 240 billion in 2023 and reaching a record high of 245 billion USD in 2024.

China is also firmly on Russia’s side in the Ukraine war, primarily out of self-interest, as a Russian defeat would lead to a “qualitative weakening of China’s position”.¹³⁴ As a result, China’s mediation efforts are limited to empty talk primarily intended to mask any appearance of involvement in the war for the international community, something that has not escaped Russian observers.¹³⁵ Only in relation to the use of nuclear weapons has the Chinese leadership publicly adopted a clear position, though even here, Russia’s nuclear proponents are keen to downplay any impression of Chinese opposition. Karaganov, for instance, asserts that: “In-depth discussions with Chinese experts have shown that they are receptive to the thesis of the need to achieve the defeat of the West in Ukraine at any cost.”¹³⁶

The – steadily growing – economic and political asymmetry between Russia and China has, of course, not gone unnoticed by observers in Moscow either. Karaganov, too, is well aware that China’s “economic influence in and on Russia” will continue to grow. However, he reassures himself with the belief that Russia will never become a Chinese satellite, firstly, because it has a long history of defending its “sovereignty” against all manner of invaders, from the Mongols to Hitler, and secondly, because the Chi-

¹²⁷ Karaganov, loc. cit., note 21.

¹²⁸ Karaganov, loc. cit., note 46. As always, Karaganov also provided a detailed account of this optimistic assessment in an HSE and SVOP report, Sergey Karaganov, Alexander Kramarenko and Dmitry Trenin, *Russia’s Policy Towards the World Majority*, Moscow 2023.

¹²⁹ Trenin, loc. cit., note 73.

¹³⁰ Trenin, loc. cit., note 16.

¹³¹ Trenin, loc. cit., note 34.

¹³² This refers to Karaganov, who has repeatedly invoked the enthusiastic liberation of the Global South from the “yoke of the West”; see, for example, *Navigating the Fog: An Interview with Professor Sergei A. Karaganov*, 9 December 2024, <https://english.almayadeen.net/articles/features/navigating-the-fog--an-interview-with-professor-sergei-a--ka>.

¹³³ Ivan Timofeev, *The New Balance of Power, Adequacy of Elites and Western Sanctions and Goals*, 17 July 2024, <https://russiancouncil.ru/en/analytics-and-comments/interview/the-new-balance-of-power-adequacy-of-elites-and-western-sanctions-and-goals>.

¹³⁴ Karaganov, loc. cit., note 76.

¹³⁵ Andrey Kortunov, *KHP не готова активно урегулировать конфликт на Украине* (China is not ready to actively resolve the conflict in Ukraine), 24 July 2024, <https://russiancouncil.ru/analytics-and-comments/comments/knr-ne-gotova-aktivno-uregulirovat-konflikt-na-ukraine>.

¹³⁶ Karaganov, loc. cit., note 37. In the previous year, he had still argued that in such a case, one could not really count on “rapid support” from the “global majority”, then going on to offer words of reassurance: “But in the end, the winners are not judged. And the savior is thanked” (Karaganov, loc. cit., note 78).

nese have a unique civilisation that, unlike the West, they neither wish to nor are able to export. Nevertheless, the issue of power politics remains. This is why Karaganov claims to have argued for a long time that “we have to solve the Ukraine problem, we have to solve the NATO problem, so that we can be in a strong position vis-à-vis China. Now it will be much more difficult for Russia to resist Chinese power.”¹³⁷ That said, Karaganov himself does in fact concede elsewhere that this assertion is not overly plausible, given Russia’s limited room for manoeuvre due to the war: “When we had at least some relations with the West, of course, we had a stronger position, for example, in relations with China. Now, of course, Beijing looks much stronger in our pairing than it did three years ago, when we were still stronger overall.”¹³⁸

For Lukyanov it is therefore quite clear that – in the medium or long term – Russia will have to consider creating a “counterbalance to China”: “No matter how wonderful relations with it may be, it is a huge power with its own tasks, which it will implement consistently and, under certain circumstances, rigorously. This is perfectly normal, as is Russia’s desire to create additional guarantees for itself in the face of China.”¹³⁹ So far, however, no voices can be heard hinting at support for the strategy Trump is supposedly pursuing to drive a wedge between Russia and China. But in any case, according to Lukyanov, everything remains in flux. On the one hand, he postulates the emergence of “two opposing ‘anti-worlds’” battling for a “new global hierarchy”: “In its center are two special military operations: Russia against Ukraine and the West against Russia” – with China as the multiplier. On the other hand, however, he sees the opposing groups as merely “instrumental, created for the war and not stable in the long term”.¹⁴⁰ The same applies to Russia’s pivot to the East, which, although officially declared, has so far yielded “minimal results” because mentally, the Russians are “of course positioned in the other direction”: “We are still sitting on this, although we are already being kicked out of the West, but we cannot believe that this is a serious and lasting way to arrange relations with the East.”¹⁴¹

Conversely, despite NATO reaching out to Asia, fundamentally, it still remains “an organisation of the political West”. This raises the question – also for China – as to whether NATO will continue “to enlarge indefinitely” as it has in

the past, or whether it will restrict itself to a “clear area of responsibility”. This will determine in Asia, as much as it did in Ukraine, whether the conflict will remain a cold war or in fact will escalate into a hot one, as Lukyanov emphasises in line with Moscow’s official war narrative.¹⁴² His conclusions about the war in Ukraine and the conditions for its end – as well as its consequences – are clear: “This is not a territorial conflict, but a conflict which may only end when NATO abandons its main goal and function.”¹⁴³ And with these words, Lukyanov is expressing something akin to a consensus within Moscow’s political class. The only question remaining is whether this will be achieved on the battlefield – in Ukraine and potentially even beyond – or through negotiations. This, however, makes a world of difference.

¹³⁷ Karaganov, loc. cit., note 36.

¹³⁸ Karaganov, loc. cit., note 21.

¹³⁹ Fyodor Lukyanov, Глобальное большинство – на перекрёстке мировой политики? (Global majority – at the crossroads of world politics?), 18 May 2023, <https://russiancouncil.ru/analytics-and-comments/comments/globalnoe-bolshinstvo-na-perekrestke-mirovoi-politiki>. Especially as he writes elsewhere: “The Sino-Russian rapprochement will have the same limits as the Russian-Western one. When Russia starts to feel that there is a chance to lose strategic independence (which is not the case by far yet), it will start to distance itself and seek counterbalances” (Fyodor Lukyanov, Ukraine, Russia, and the New World Order, 14 October 2022, <https://eng.globalaffairs.ru/articles/ukraine-russia-world-order>).

¹⁴⁰ Fyodor Lukyanov, Какими будут последствия введённой Западом против России анти-СВО (The consequences of the anti-special operation campaign waged by the West against Russia), Profil, 28 March 2023, <https://profile.ru/abroad/kakimi-budut-posledstviya-vedushhejsya-zapodom-protiv-rossii-anti-svo-1292902>.

¹⁴¹ Fyodor Lukyanov, Россия как страна здравого смысла – вот это было бы здорово (Russia as a country of common sense – that would be great), 13 February 2023, <https://russiancouncil.ru/analytics-and-comments/comments/rossiya-kak-strana-zdravogo-smysla-vot-eto-bylo-by-zdorovo>.

¹⁴² Fyodor Lukyanov, Trump and NATO: Global Perspectives on the 2024 NATO Summit and America, 19 July 2024, <https://eng.globalaffairs.ru/articles/trump-and-nato-lukyanov>. Fyodor Lukyanov, NATO looks strong but the real picture is very different, 9 April 2024, <https://russiancouncil.ru/en/analytics-and-comments/comments/nato-looks-strong-but-the-real-picture-is-very-different>.

¹⁴³ Lukyanov, loc. cit., note 31.

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The Future of NATO – Country Report Russia

NATO has been a key security pillar of German and European defence policy from the very outset. Since the end of the Cold War, however, it has undergone a series of international transformations and realignments, driven by developments in the global security environment and pressure from its own member states.

While the Russian war of aggression against Ukraine has strengthened NATO's self-perception as a key guarantor of collective security, the change in US administration at the beginning of 2025 raises fundamental questions once again. What role will the US play in Europe's future security, and how might European nations respond to the situation?

This publication is part of a Friedrich-Ebert-Stiftung study entitled "The Future of NATO", which summarises and analyses the ongoing debates on the Alliance and current security challenges in 11 member and 3 non-member states. These country studies form the basis of an overarching publication which seeks to provide possible answers to the unresolved questions and propose potential scenarios for the future of NATO.

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