

CONVERSATIONS

WITH BILL KRISTOL

BILL KRISTOL:

Hi, I am Bill Kristol. Welcome back to *Conversations*. I'm very pleased to be joined again, amazingly, I looked it up for the 5th time since the war in Ukraine began, by Fred Kagan, who's been an invaluable guide to understanding the war as it's gone through its different phases. Fred is a senior fellow at the American Enterprise Institute, runs its Critical Threats Project and is a major contributor to the Institute for the Study of War, ISW's daily updates on the situation in Ukraine, which are must-reading and I'm sure all of you are reading already, but you can read them for free by just subscribing to ISW. So Fred Kagan, thanks for joining me again.

FRED KAGAN:

It's great to be back with you, Bill.

BILL KRISTOL:

We last spoke in September. We were, I think, hopeful that the aid package would move soon and you had an analysis of the war that slightly wasn't dependent on that, but assumed that that might happen, didn't happen and now, it's finally happened. Where do we stand? How much of a price have we paid, have the Ukrainians paid for not having the aid they could have had for the last five, six months? But, how does the war stand on the ground?

FRED KAGAN:

So the Russians began of their own offensive operations as the Ukrainian counteroffensive wound down in the fall. And as the likelihood of renewed US aid dropped, the Russians began really leaning into their offensive operations because they saw an opportunity. It's not clear to me if the Kremlin decided that it actually had broken our will, or certainly Putin thought that he might have. And I think that that did encourage him. But mainly I think the Russian military and the Kremlin saw an opportunity in what was going to be a dip in availability of Ukrainian resources and leaned into that. As the Ukrainians began seriously to run out of ammunition, artillery, and air defense interceptors, mainly in the late winter, the Russians really started leaning into their offensive operations. And, they launched offensives all up and down the eastern side of the line from the Kupyansk area near Kharkiv Oblast, down to the Donetsk city area and Avdiivka.

The Russians did a bunch of things that allowed them to take advantage of the reduction in Ukrainian available munitions. And it's important not to underestimate the Russians here. It's important not to overestimate them, but it's important not to underestimate them. They did make a number of important tactical adaptations, and one was that they mass produced and kitted out their bombs with these glide bomb kits, and they developed the tactics to have their fighter bombers take advantage of the loss of Ukrainian air defense over the front lines. As Ukraine ran out of interceptors and concentrated them around Kyiv, Ukrainians had to pull it back from the front line, and the Russians started using glide bombs against Ukrainian frontline units at a scale that we've never seen before in this war. At the same time, as Russian artillerymen had

anywhere from six to 10 to one advantages in shell count over their Ukrainian defenders, and the Russians put those advantages to good use. And, they would use the glide bomb attacks to just pulverize Ukrainian defensive positions and they would use their artillery to do the same.

They adapted their tactics a little bit, and that's what allowed them to take Avdiivka. And that is what has allowed them to push west out of Bakhmut, and to continue the attacks around Avdiivka and elsewhere along the line, as the Ukrainians have entered a period where they just don't have anything to shoot back with. And, we've had...

BILL KRISTOL:

So, really was serious, the cut off of the aid, I mean, it wasn't just like on the margin.

FRED KAGAN:

No.

BILL KRISTOL:

A little bit of, they had to adjust one or two things.

FRED KAGAN:

No, it was just—

BILL KRISTOL:

It was just the Russians got better, though, that—

FRED KAGAN:

Yeah, it's devastating. It was absolutely devastating. We've seen reports in various western outlets interviewing Ukrainian soldiers and they would say, "Russians would send 10, 12 tanks at us." "We would have one or two rounds to shoot at them and after that, it was machine guns." "And, you're not stopping tanks and armored vehicles with machine guns." And the bombing really has been devastating and that's because the Ukrainians ran out of interceptors. If you remember that brief flurry, when the Ukrainians were shooting down some Russian fighter bombers around Avdiivka, that showed that the Ukrainians, when they have, our long-range air defense can keep the Russians away from the lines. But as they ran out of interceptors, they had to ration and pull back from the front and that opened us up. So that's created a situation, where the Russians are making what we call, incremental tactical gains, particularly around Avdiivka.

And, that's because the Russians managed to collapse the Ukrainian pocket that the Russians had created there. And the Ukrainians were not as well-prepared as they might've been to hold the subsequent defensive line and the Russians have been leaning into that or reinforcing that effort. The Russians are going to continue to gain ground there. I'm not that alarmed about it right now, because there's not that much out there. So, the Russians have to go pretty far before that really becomes a significant breakthrough, other than just gaining territory. What I'm more alarmed about is the Russian drive west from Bakhmut toward the town of Chasiv Yar, which is a linchpin to what we call the fortress belt. There's a belt of cities in Eastern Ukraine, the southernmost of which is Kostiantynivka, and then Kramatorsk, which some people have heard about, Slavyansk, which the Ukrainians defended against the Russian drive in 2022. And Chasiv Yar is among those.

It's not clear that the Russians won't be able to take Chasiv Yar, that would be very significant and that would put them in a good position to challenge that fortress belt for the first time since 2022. Fighting's paused around there for now, but I think we're going to see a renewed Russian offensive. So the bottom line is that we've got two major Russian drives going on right now, one of them is making ground, but it's not ground that matters a ton at the moment. The other of which is a little slow right at the moment, but it's more operationally significant. So the phase we're in is, we're rushing to get supplies to the Ukrainians, Ukrainians are going to rush to get it to the front line. I think the Ukrainians will be able to stabilize the line relatively soon in the coming weeks for various reasons that I could go into. As the materiel begins to arrive, I think the Ukrainians will be able to weather this particular drive without losing too much more. Chasiv Yar being the big question mark. But then, we're onto the next challenge and the next—

BILL KRISTOL:

What's the timeframe of these phases now? So this is a sort of May, June thing, what you've been describing?

FRED KAGAN:

Well, I think if the Ukrainians haven't been able to stabilize this particular set of drives within the next couple of weeks, I think we'll have a problem. I think it's going to take... President Biden only signed the bill into law on Wednesday, so it's not even been a week Tuesday.

BILL KRISTOL:

We're speaking Tuesday April 30th. I should clarify for people who might be watching it a little later. But yeah, less than a week after.

FRED KAGAN:

Yeah, it's not even been a week. It takes time. Even if we had everything loaded up on rail cars, it takes time to get them into Ukraine. It takes time to get them to the front line and takes time for that to have an effect. So, I would think sometime in the next couple of weeks, I would expect and hope to see the Ukrainians starting to stabilize the lines against this attack. But, the Russians are also preparing more significant offensive operations. Timing for those is a little bit less clear, we've heard Ukrainian estimates ranging from late May to June or even July, depends on exactly what conditions the Russians are trying to set and what risks they're trying to take.

But the Russians have built up a lot of reserves and they are holding forces in reserve, in preparation for those offensive operations. So I think odds are, sometime in mid to late May, June, we'll see the start of another major Russian offensive operation and the Ukrainians will have to weather that. There are some alarming things or potentially alarming things that we're seeing, the Russians are building a group of forces in Belgorod Oblast, which is the Russian area directly north of Kharkiv. And Ukrainians are talking about Russians preparing to drive on Kharkiv City, again, which they have not done since 2022.

I'm personally skeptical that the Russians are going to be able to put together a large enough force really to threaten to take the city against equipped Ukrainian defenders, but that will draw Ukrainian forces away from other parts of the front and make defending against the whole thing challenging. So, I think we're going to see a series of Russian offensives probably rippling across the front starting in late May and running

through August, September, that the Ukrainians are going to have to receive and stop. So, I think the summer is going to be a Russian offensive summer.

BILL KRISTOL:

So, a rough summer and...

FRED KAGAN:

Yeah.

BILL KRISTOL:

But sounds like you think the Ukrainians, the odds are the front doesn't collapse and they have to give some ground and take casualties, of course, and all that, but not a disaster.

FRED KAGAN:

Yeah. I don't think... I'm really pretty confident the Ukrainians are not going to lose Kharkiv or any major city and that the front is not going to collapse. And we'll see what ground and troops they lose. But I think I'm pretty confident with the aid package coming in, also with things, and we can talk about this more, that the Ukrainians are doing to address their own manpower problems. I'm pretty confident the Ukrainians are going to weather the Russian summer offensive without having really terrible things happen.

BIL KRISTOL:

And this brutal, I guess, bombing campaign against civilian sites all over the place, Odessa and elsewhere, that too, they can and will have to weather, how important is that strategically?

FRED KAGAN:

So the brutality against civilians is, these are war crimes and very serious things. They're not going to break Ukraine will to fight. That's just unnecessary evil. The part of the strategic bombing campaign, because basically what this missile campaign is, is its strategic bombing campaign done with missiles and drones. The part of it that is problematic is the attack on the Ukrainian energy infrastructure, which has been devastatingly effective. And that's bad in all kinds of ways. And also now, of course, the Russians are striking rail facilities and other things to try to hinder the arrival of the aid. I think it's too soon to tell how effective that will be. But hopefully, some of the first aid that's going to be arriving is going to be Patriot interceptors, which can help the Ukrainians defend against these attacks. Because it really has been, I mean, the things that have gotten... The artillery shortages have been very bad, but as the Ukrainians been running out of interceptors, that's what's been terrifying. And it's one of the reasons why I really started hopping up and down about the aid package, I and others. Because if the Ukrainians actually ran out of interceptors, we could be having a Aleppo going on.

I mean, we could actually start to have Russian man bombers over Ukrainian cities and that was a real danger. That's not going to happen with the aid package that we have now. So, I think the Ukrainians will be able to go back to shooting down a higher percentage of the missiles and defending this infrastructure. But the Russians have gotten better, they've gotten better with targeting. They've figured out what kind of

target, what kind of missile packages work, so it's going to be tough. But the inflow of aid will, I think, help the Ukrainians get this back under control.

BILL KRISTOL:

So there'll be a rough summer and we'll know at some point, sounds like what? Whether basically, it's rough, but manageable or rough, but really dangerous, even more dangerous. That's presumably what? Midsummer or...

FRED KAGAN:

August.

BILL KRISTOL:

August.

FRED KAGAN:

I think by August, we'll have a good sense of where this is headed.

BILL KRISTOL:

And even if it's manageable, if I can use that term in a war, but survivable, still the Ukrainians don't have any... still are just playing defense and trying to stabilize the situation, it sounds like—

FRED KAGAN:

Through the summer, yeah

BILL KRISTOL:

Through the summer, yeah.

FRED KAGAN:

...through the summer, yeah. Now, after that, things start to get interesting, because the Russians don't have limitless manpower, they don't have limitless military capacity, they are mobilizing what they're going to mobilize for this year and they're going to presumably hurl it into these offensive operations. And I do think the Ukrainians will hold the offensives, hold the lines. As a defender, you have some opportunities when you've stopped an attack, depending on your own capabilities and your own resources. And on the one hand, you can just wipe your brow, and recover yourself and think about what's coming next. You can also, however, take advantage of the fact that an enemy whose attacks have failed, tends to be disorganized and offer opportunities for counter strokes.

And I think the later we get into the year, the more possible it is to think about Ukrainians conducting counterattacks into stalling Russian offensive operations and starting to regain a little bit of the initiative on the battlefield. This is what the Ukrainians are talking about doing. It's hard to see past the event horizons of the offensives to assess whether they're going to be able to do that or not. There's a lot of variables there. Militarily, in terms of how our military operations work, it's very plausible.

So it's, option number one is that we get into the fall, into the early fall and Ukrainians actually are able to begin conducting some limited counterattacks, maybe very small counteroffensives to take advantage of failing Russian attacks. Or alternatively, the

Russian attacks peter out and the Ukrainians take advantage of what should be getting to the climax of the inflow of this aid package and other European aid packages, as well as addressing their own manpower, challenges as I've said, and prepare possibly for a winter offense, counteroffensive... That would be optimistic. I can see other scenarios possibly more realistic, in which the Ukrainians focus on a spring counteroffensive. But they definitely intend to launch it counteroffensive. And as bad as things look at the moment, it's still very conceivable to see how the Ukrainians could launch a counteroffensive and begin to take back territory, either late this year or into next year.

BILL KRISTOL:

Interesting. And we haven't discussed yet, and I will maybe this is the transition, but we can come back to some of the things we've been talking about too, which we're talking about what's happening on the front and assuming, I guess, the current... What should we call them? Rules of engagement, constraints of engagement that have been imposed or just necessary, in terms of what Ukraine's done and stuff. I mean, how important is that? I mean, people talk about it a lot, "If only we had allowed Ukraine to do X, Y, provided them certain weapons that were longer range, not tried to stop them from attacking within Russia and so forth." A, does that all matter that much over the next few months at least? And B, is some of that going to change or should it change?

FRED KAGAN:

Well, let's talk about the issue of sanctuary first. I think it's important for US decision makers and people who are in the policy space to reflect on why we think it's such a good idea to establish the principle that aggressors get to have sanctuary in their own countries as they commit aggression. Why it is that we are taking the position that there's some reason why the Ukrainians should not be striking targets in Russia when Russia invaded them. This is contrary to international law. You are absolutely allowed to attack the territory of a country that has invaded you, and it's contrary to all military sense. Of course, we have the same discussions about Iran.

The Iranians have been killing Americans. And now, by proxy Israelis for a long time they've attacked our Saudi allies, other Arab allies, and we've taken the position that nobody should fire a shot into Iran. Are we going to extend that principle to China, by the way? If the Chinese attack Taiwan, are we going to take the position that we can't hit the Chinese mainland, which would be the logical extension of this? So I actually think we really need to reflect on why we think this is a principle that we want to be defending. In this specific case, I am less enthusiastic about the Ukrainian strikes on Russian energy infrastructure because I think the net effect of that is going to be limited. I'm very enthusiastic about the Ukrainian strikes on Russian airfields. If you think about this, it's kind of crazy. Russians are flying sorties from military airfields to bomb Ukrainian cities.

Ukrainians have the wherewithal, and we could give them more to strike those legitimate military targets, and we've been unhappy about that. That makes no sense at all. The Ukrainians have been doing it anyway, and that's really good to see and I hope that they'll do more of it because they can't stop the Russians from flying, but they can make it harder and that's something that's worth doing. So I would hope that the US administration would rethink its position on Ukrainian strikes, especially on legitimate Russian military targets that have an immediate impact on Russia's ability to attack Ukraine and Ukrainian cities. Because I'd actually think that that is very important, and our hostility to that is pretty indefensible. The Russians are not going to use tactical nuclear weapons in Ukraine because the Ukrainians hit military airfields, and the

Russians are for sure not going to go to war with NATO because the Ukrainians hit angles base two, that's nonsense.

BILL KRISTOL:

The Russians aren't going to use nuclear weapons, presumably if we increase the Ukrainian's capacity to do these things that they are doing anyway incidentally, but in limited ways, right?

FRED KAGAN:

Yeah. I mean, this whole... Look, I don't want to poo-poo the escalation thing. I've never wanted to poo-poo the escalation thing. Anytime you're dealing with major nuclear power that is talking about nuclear weapons, you have to take it very seriously. But first of all, all along as you recall in all of our previous conversations, I've said Putin is not an apocalyptic actor who's going to embrace nuclear war rather than defeat. That's proved to be true. He's not looking at defeat right now anyway. He's not going to use nuclear weapons lightly. And all of the red lines that we've been told were red lines have proven not to be red lines. Doesn't mean none of them will be, but I think we really need to move past this particular extreme fear of escalation and understand we are helping the Ukrainians do something that's unacceptable to the Russians in principle, which is survive, okay? Well, the Russians are living with that because the alternatives are worse for them.

BILL KRISTOL:

And how much of a price have we paid and are we paying for what, I take it, you view and many do as excessive self-deterrence and fear of escalation and not providing certain weapons systems to the Ukrainians. Has it been on the margin? Has it been important? Is it now going forward even more important? How does one judge that?

FRED KAGAN:

There's a lot of sunk risk already and sunk cost in that self-deterrence that is just, it's why we've been a day late and weapons system short this entire war. The Ukrainians should have scores of M1 tanks by now, they don't. That was a whole part of an earlier risk calculation. They should be flying F-16s by now. They're not. Why was that? That was part of this risk calculation. The long-range strike, the ATACMs and things that we're talking about are just the next iteration of our hesitance to provide the Ukrainians with weapons. I think we are providing them with the ATACMs. I think we're going to give them the ATACMs now.

I expect we're still going to have the same restraints that we've put on them about hitting targets in Russia proper, which again, I don't think make any sense. In the case of the ATACMs, I don't know how significant that is because I'm not sure that that would be the optimal use of those systems anyway. I mean, we can't just point to one system and talk about the self-deterrence. This is the part of the reason the Ukrainians are in the problem that they're in is because it was apparent in early 2022—and we wrote this—it was apparent that we were going to have to start sending the Ukrainians tanks.

It was apparent that we were going to have to start sending them correct planes. It was apparent we were going to have to start sending them patriots. We were months, in some cases years behind doing those things, and that has shaped the course of the conflict in a significant way. And the current discussions are just an extension of that. The administration has got to get past this incrementalism that it has had, and we have

to get over our hesitations about providing Ukraine with the weapons of war that it needs.

BILL KRISTOL:

And is the administration getting past it in your judgment?

FRED KAGAN:

It's really not clear. It's really not clear. The administration hasn't said much about what it's going to do differently with this package or whether it's going to do anything differently with this package. This is a much larger package than any previous package. Now, that's largely because it was meant to be passed in the fall and cover the entire period to the election. It's going to be interesting to see what the effect of the delay is because now we're actually going to, in principle, flood Ukraine with what was meant to be a year's worth of weapons right now, but I don't know. It's really been surprising how little the administration has said about what they're going to do and whether they're going to do anything differently, and to me, that's a little bit alarming actually. I would really have hoped for a statement from the administration to make it clear that they are really now serious and that they're really going to lean into helping Ukraine stabilize the lines and liberate its territory, and we are going to do things differently from the way that we've done before. I haven't really heard that.

BILL KRISTOL:

Yeah. You'd think that the overwhelming passage really at the end of the day of the aid package for Ukraine in both houses would be the occasion for the president to both welcome that, to talk about the bipartisan supports, do his best to liberate as much of the Republican Party and Republican voters for that matter, from let's say the America First side of the party as possible. And then maybe also lean forward further since at this point, I mean a lot of the criticism he was getting from those Republicans, some of it disingenuous, some of it real, I think sincere was, "You're not doing enough," and that was combined slightly weirdly with, and therefore some of them weren't going to vote for the aid, but whatever, but they said it and it was out there. And so I am also very struck by the... It's only a week, but the relative silence of the President and the administration after this big moment, you would think, in what they've described as a decisive inflection point in US foreign policy and in the world's shaping of the 21st century global order and all that.

FRED KAGAN:

Yeah. There's a bunch of important points in there, Bill, that I think are worth teasing out.

BILL KRISTOL:

Please.

FRED KAGAN:

First of all, everyone's focused on the fact that a narrow majority of Republicans voted against the aid to Ukraine.

BILL KRISTOL:

A slight majority of Republicans, if you add the Senate, Republicans voted for the whole thing, so...

FRED KAGAN:

Yeah. I'm being in that the-

BILL KRISTOL:

In the House a majority against. So it's 50/50, let's just say.

FRED KAGAN:

...yeah. But the vote was well over two-thirds of the house and over three-quarters of the Senate, which is a massive endorsement. And there are good reasons to be worried, and there are good reasons to focus on the things that people are focusing on. But in the ordinary course of events, you would look at a vote like that and say, "This is a terrific referendum on American support for aid to Ukraine, to have huge bipartisan majorities in both houses pass a controversial aid bill. It's a really big deal." And how did that happen? Well, it happened because Speaker Johnson took a courageous position. You could criticize him for having taken a long time to get there, and I understand all the caveats there, but at the end of the day, he did take a very courageous decision. He stared down a threat to be fired, dealt with a very, very challenging situation, and made something very hard happen in this massively bipartisan way and in a way that supported the policies that the president of the opposite party in an election year has been demanding.

It would've been a really great time for, in principle, in an ordinary time for the President of the United States to get up with the speaker and do a joint press conference and talk about, and show some unity behind this policy. And I don't know that Johnson would've wanted to do that. I don't know if that would've helped him or what would've helped Biden. I understand all the complexities here, but there was an opportunity there. Johnson kind of took it a little bit, and I think when Johnson talked about himself as he said he was a wartime speaker, that was remarkable, and it was remarkable—

BILL KRISTOL:

That was not noticed enough. He stressed that he was a Reagan Republican and a wartime speaker. If you put those two things together...

FRED KAGAN:

...yeah, and he acted it. He made it happen. And he said, "I'll lose the job rather than lose the issue," and then he risked it. I haven't heard Biden say that he's a wartime president. In fact, I think Biden's trying very hard not to be a wartime president. And I think he really... I mean, again, we can talk about whether it would've been helpful to anything or not for him to do this in the current state of affairs. But in principle, one would've liked to have seen a fairly significant address from him when that bill passed, as you pointed out to me when we were chatting the other day about this, that was an opportunity missed. And I don't know that these things are retrievable, but I do think that we have to not be in the mode of saying, "Okay, phew. We got past the aid vote, now we can move on to other things," because we can't move on to other things.

This remains an incredibly important issue, and I do think that we need to see leadership from the White House and a commitment to what is after all that going to be the signature foreign policy accomplishment of this administration if it is an accomplishment. They've staked the administration on it, and I have to give Biden credit for that, he has. His foreign policy is going to be judged very heavily by this war that he's rightly been leaning into, but he's not leading on it, and I think he really needs

to, and I think Johnson has given both an example and a challenge, and it would be good to see the White House step up to that.

BILL KRISTOL:

Yeah, that's interesting. And both in terms, I think, of the speech and then possible speeches, but also deeds in terms of showing some sign of fresh thinking about, as you say, the overcoming some of the self-deterrence and all that. I mean, I should look up the vote again. I wrote something about this last week, but when Lend-Lease passed in March actually of 1941, so the election was over at that point, a little different. Roosevelt has been inaugurated again for a third term, but it passed by about the same overwhelming Democratic support, some Republican support. It wasn't that different an overall margin. I'm going to assert, it was fine. It was somewhat obviously different in either of the House or the Senate than this bill, and that was a huge moment. Everyone understood it at the time to be a huge moment. He got enough bipartisan support. Roosevelt had worked pretty hard to get bipartisan support, bringing Knox and Stimson into the cabinet and so forth in 1940.

And then Willkie supported it, the former Republican candidate. So we're challenging for Biden with Trump as the leader of the Republican Party, no question. And then Roosevelt gives a very impressive speech four days afterwards on March 15th, 1941, which I came across totally by accident as I was reading up a little on Land-Lease, where he really lays out what's at stake, and there's no ambiguity. People say Roosevelt was very cautious and Machiavellian and leading us into World War II, and obviously there's some truth to that. But this is way before, this is March of 41. This is way before Pearl Harbor. It's before a lot of things. And he's just, "We are in. I mean, we're not in terms of having troops fighting obviously in Europe or in Asia, but we're in with the allies," and he explains that really to people.

And I think that was, my sense is that, and many other things he said and did were very important in getting the American people ready for a very rough war, including a very rough war in Europe, at a Europe First war, not to get into the details of World War II strategy, which you know infinitely more about than I do, but going to war first against the people who hadn't attacked us directly, think about that for a minute. People just take that for granted. You know what I mean? That we were going to invade Europe in 1944 and Asia where there was fighting going on, obviously in the islands, but we didn't just go after the people who attacked us directly. Anyway, just a long way of saying that, I think Biden admires Roosevelt, and he probably should look back at some of what FDR did. But FDR explicitly said, "I was a New Deal president," not exactly how he said it, and now, "I'm a wartime president," that's a little different here. Obviously, it's not World War II, but a little bit of that attitude.

FRED KAGAN:

Well... I mean, it's not World War II, but you can see it from here. I mean, I think that the art of getting through this period is not getting to World War III, and I think that this is a part of the problem that the administration has, that they're also trying not to go to World War III, but their articulated theory of that case is we need to avoid provoking aggressors into doing things that will lead to World War III. And of course, that was not Roosevelt's position, and so we're not doing things, some of the things that Roosevelt did that we really should be doing like actually rearming, actually preparing our military seriously for the risk of future war, which we're not doing, and that's very alarming to me because I think that we have a... I think that the administration has a somewhat hyper-sophisticated theory about how to manage escalation and how to handle these crises and work our way through this period without having to be drawn

away from our priorities. I don't think that's the kind of world that we're in right now. And I think our priorities need to reflect the world that we're in. And the world that we're in is a world that's at war and a world where much bigger war is very possible. And I don't think that that war is going to be averted by careful, cautious escalation management at this point. I think we're going to need to help our friends and allies inflict defeats on our enemies and make it clear to those enemies and to potential future enemies that they can't succeed and that we're not going to let them succeed. We're not going to attack them. We don't want to go to war with them, but we're not going to let them defeat our friends and allies and partners. And so this would be a good time to stop.

And so there are all kinds of lessons of the '30s in here as well. We've passed a test, and I do think for all of our aggravation about what's going on, it is important to recognize that the United States of America collectively walked up to the brink of what would've been a catastrophically bad, basically a national suicide pact if we had not passed this aid, if we'd cut this off, said, "We're done here." That would've been a national security cataclysm. And we walked up to that abyss, and we looked into it, and we thought hard about jumping into it. And then we decided not to. That doesn't mean we won't make a catastrophic mistake in the future, but I think it's important for us to recognize that that just happened and for the world to recognize that that just happened.

And now, all of those of us who celebrate the fact that we walked back from the abyss need to lean into helping continue the process of education that helped get us to do that. And that education is about understanding our enemies, understanding what their objectives are, and understanding what we need to do in order to stop them from achieving their aims now in hope and expectation of persuading them not to try to escalate to the point of fighting us directly in years to come. And Speaker Johnson also put this well. He talked about his son and he said, "I'd rather send money to Ukraine now than send my son to fight the Russians in the future." That's the option that we have right now, and we chose the right option this time.

BILL KRISTOL:

I think you're right to really stress the deterrence point, which isn't really the point that's made by the 1940 or '41 analogy. It's more that would be an analogy, but it is a true analogy in the '30s of course, that if we had done certain things much earlier and Britain had and so forth and France, we might have changed the course of history. And so for Ukraine, it's 1940 or '41 and we need to help them win. But for us in a certain weird way or the broader world of democracies and free nations and anti-dictators, it's maybe more like mid-late '30s. And it's a deterrence question, not just a gearing up to fight question. But of course the two are very closely related since you don't deter unless you gear up to fight as you just pointed out.

FRED KAGAN:

Yeah, absolutely.

BILL KRISTOL:

Yeah, so he has to say, "I'm a wartime president, but I'm also a president who is deterring much bigger and more dangerous wars by doing what we're doing now," right? I guess that shouldn't be too complicated a message to get to people. I don't know.

FRED KAGAN:

No. When Johnson says, "I'm a wartime Speaker," he knows we're not fighting. What he's saying is the world is at war and the wars affect us, and we have to be a part of this effort to help our partners fight and win the wars that they're fighting. And we need to do that because they're fighting our common enemies. And if they're successful, we are much less likely to have to fight. It's a very straightforward argument to make actually. And we're not hearing that argument enough from the White House actually.

BILL KRISTOL:

Yeah, maybe they'll pick it up from you. That was very well said. It's very straightforward, but it takes a little thinking. But as you say, it doesn't require huge convolutions. But let's talk about that, the world at war. That isn't, I would say, the attitude here, not just in the White House, but maybe even among a lot of foreign policy types. There are different wars going on. People are alarmed. They don't think it's back to 20 years ago. They're not foolish in that way or 10 years ago, whatever, I don't think. But they still don't quite see. I'm curious what you have to say about both Europe in particular, which has been right there, and which on the one hand gets criticized by Americans, on the other hand, it's praised by some Americans. And then we can get maybe to the broader question of what does it need to say. And I think you said it very well that it's a world at war. But maybe Europe first would be useful.

FRED KAGAN:

The debate and delay in the provision of U.S. aid has really gotten a lot of Europeans to get religion and to understand that they really need to think about what the world looks like without America. I think you can go too far in drawing this out because they looked at what the world might look like without America, but no one was giving up on America actually coming through, and we ultimately did, which was important. And I think that that's important in a couple of ways because I don't know what the European commitment would have continued to look like if we actually had decided that we're done here.

BILL KRISTOL:

Right.

FRED KAGAN:

And I think it's important not to just make a straight-line extrapolation of where they would've gone if we had made a catastrophically bad decision.

BILL KRISTOL:

Or where they will go if they think we're going to make that decision after November 5th. I think a little bit of alarm is healthy, but if America gives up, I don't know if they really can step fully step up, right?

FRED KAGAN:

Well, they can't step up right now. I'm sorry. They are stepping up. They can't offset an American retreat fully now, but we are seeing a lot of initiatives that I would never have expected to see in principle. We are seeing Europeans digging through their own arsenals to get weapons to Ukraine, spending their own money to get weapons to Ukraine. We're beating up on the Europeans about their defense budgets. They do need to increase their defense budgets. I would note parenthetically that all of the states that actually border the Russian sphere are spending more than 2% of GDP on defense. So,

if anyone is going to take the position that we're only going to defend NATO countries that are spending more than 2% of GDP, then that actually covers all the countries that would actually be attacked. But the Germans are increasing their defense budget, the French are spending, the British are talking about what they're going to do and getting a bit more serious about that. But beyond that, they're spending money on weapons for Ukraine. And I think as we talk about spending money on defense budgets, we need to factor in the expenditures on weapons provisions to Ukraine. It's not the same per se as building up their own militaries, but it is building up their defense industrial bases. And this is a very important thing. We all have allowed our defense industrial bases to atrophy, and this goes back to the '90s and the peace dividends where it was US policy to try to get our defense contractors to merge and to downsize because it was peace dividend. At the time, I thought that was a bad idea, and I've thought it was a bad idea ever since because we need to have the capability to surge, which we don't now have. And we see that across the board with all of the systems that the Ukrainians are using rapidly. The Europeans similarly allowed their defense industrial bases to atrophy and weaken, but now they're building them up again. And just as the package that the Congress just passed is a massive stimulant to the American defense industrial base, since well over half of that money goes to US defense industry.

So the aid packages to Ukraine are also stimulants to the European defense industrial base. And we're seeing combinations of the European defense majors like Rheinmetall investing in lines and making acquisitions and positioning themselves to be able to support and sustain Ukraine over the long term. We're also seeing smaller companies and new joint ventures, including with Ukraine emerge. Ukrainian companies are doing joint ventures with European companies to create a defense industrial base that will be able to sustain Ukraine at a much higher level over the long term. That's very important because as you look at what is the off ramp for US support to Ukraine, this is part of the off ramp. Part of the way that we get to a point where Ukraine continues to get what it needs and the American taxpayer doesn't have to shell out tens of billions of dollars every year, is that we get the European defense industrial base mobilized, and we get the Europeans serious about paying for helping Ukraine, and that process is underway.

So the urgency of the aid is because only the US has enough stocks and enough capacity right now to deal with the immediate emergency. That'll be true next year as well. But if current trends continue, in out years, we should start to see the Europeans and the Ukrainians themselves able to provide a much higher proportion of what Ukraine actually needs to defend itself independently of the United States, which would be good for everybody. And that is a positive development that we've been seeing, and that is a result of the Europeans realizing that they are really at threat and it's much better for them for the Ukrainians to hold the threat where it is than to look at the alternatives. And Europeans are changing their policy. Are they doing enough? No. Germans are still Germans. We're still making various different decisions.

We have rising right-wing nationalist populist parties across Europe, in many cases, not rising entirely coincidentally, and in some cases having some assistance from those who would benefit from having them in power, but in many cases, just tapping the same sort of nationalist extremist roots that are happening here and elsewhere. That's a threat. That could derail this kind of activity. And then of course, Europeans will have to make the hard decisions about what sacrifices they're willing to make with their welfare states and their social safety nets and various other things in order to turn fully around. I don't expect that to happen instantly, but it's happening a lot faster than I would've thought. And so I think there's a lot of hope for optimism there.

And of course, just stretching Europe out of shape, our Asian allies also get this. So the South Koreans have been leaning into thinking about how within the parameters of

their constitution they can help, the Japanese have been leaning into thinking about how within the parameters of their constitution they can help, the Taiwanese have been thinking about that, the Australians have been thinking about... The Australians have been sending money and weapons. The free world generally has come to understand that this war is a pivotal conflict, and that the free world really needs to win. And so the free world has been stepping up, and I think there's grounds for optimism there.

BILL KRISTOL:

Yeah, I think that's really well said and interesting. I've been struck... a year ago when I was in Europe a few times, I tried to make the argument that, look, think ahead. Ukraine could be an important partner in preserving the peace. It's not just that we're helping a poor country that's suffering terribly from a totally unjust aggression against it, and they need our help. That's true and was true and is true, and they are suffering a ton, but they're a big country and they're an impressive country as we've seen. And I kind of feel like in the Europeans I've spoken with, that's beginning to penetrate, partly just with the Ukrainians are producing a lot of stuff and turned out to be ahead of their, quote, more advanced European partners and adapting to certain things and producing certain things. But yeah, we're still only part way, and coming to grips with that aspect of the world that we're living in to think of Ukraine that way, not as a little country that we're helping out. It's not Kuwait against Saddam or Iraq or something like that.

FRED KAGAN:

No, that's a really important point, Bill. If you picture a successful outcome to this war, and I'm going to, for purposes of the discussion, define successful as the Ukraine has some of its territory back, but not all of its territory back. The Russians have accepted that they can't win and therefore have effectively accepted that they've been defeated, and we have a strong independent Western-aligned Ukraine that isn't a member of NATO, but that both NATO understands is an important partner in Ukraine, will always look to NATO as an essential partner, any Western-oriented Ukraine will, regardless of its membership status. What do you have then? The largest and most powerful army in Europe after Russia's will be Ukraine's.

And that army will be a danger to any future Russian military project. And this is one of the things that we've looked at with the ISW team. We looked at the scenarios for a Russian invasion of the Baltics if Ukraine is successful or if Russia wins the war. And if Russia wins the war, it's very hard for me to see how we defend the Baltics. If Ukraine is successful, I would not want to be the Russian planner who has to think about how to attack the Baltics with the second-largest army in Europe right in his rear. Ukraine won't be a member of the Alliance. If I were with the Russians, I would not be comfortable assuming that the Ukrainians would watch. This is a potentially very powerful check on any future Russian aggression, would be a strong, independent Western-oriented Ukraine. It is worth investing in because it significantly increases the likelihood that we will be able to deter a future Russian attack, not just for all of the moral sort of Russians-understanding-how-tough-we-are reasons, but for hard, practical, military reality reasons of how much the Russians would have to allocate defending against a possible Ukrainian attack in support of NATO if the Russians attack NATO.

BILL KRISTOL:

That's really interesting. And it sounds like you don't think that the actual admission of Ukraine to the Alliance is crucially important. De facto can be, as it were, part of it

without being officially the 30-whatever member, 33rd member or whatever it would be.

FRED KAGAN:

Look, I think your point about Ukraine is not a small country, and it needn't be a ward of the West. It can be an active, major contributor to Western security means that I am not satisfied with the notion that the long-term solution to Ukraine is to bring it into NATO so that Article 5 can protect it. If we brought Ukraine into NATO, the reason to do that would be so that Ukraine can protect against the likelihood of a test of Article 5 by deterring a Russian enthusiasm for adventure. I think Ukraine can do that without being a member of the alliance. I also think that bilateral security guarantees with the major European partners, probably good enough, apart from NATO membership. I would love to see Ukraine become part of the alliance. It's hard for me to see that happening as long as Orban is running Hungary, or Erdogan is running Turkey, other factors.

But there's a whole other conversation we can have some time about the fetishizing of Article 5 that we've got going on here. Article 5 isn't a magical veil. Article 5 is as strong as the Russians think our commitment to do anything about it actually is. Helping Ukraine win the war would be a strong statement that would make Article 5 stronger, whether Ukraine has anything to do with the alliance or not.

BILL KRISTOL:

And the opposite.

FRED KAGAN:

Absolutely.

BILL KRISTOL:

Yeah, I totally agree with you. I've been, of course, pro-NATO in that respect, but want to stress the importance of Article 5 and not let people just denigrate it or throw it out because someone's not spending 2%, someone's spending 1.9% of GDP on defense or something like that. On the other hand, I agree the fetishizing of it has become... It's almost like a magic thing that... The key isn't the magic, the key is doing what's needed to actually deter. And to actually win first and then to actually deter, I guess, and in the actual war that's happening, a very large war, incidentally. I do feel like one thing, and this will get us maybe to I think what should be our final topic, which is the World War global character of this thing, but I feel like the argument that you argued very strongly against in previous conversations and elsewhere that we have to pull back from Europe so we could be serious about confronting China.

I feel like that argument's not gone very well for them for the last year or so. First of all, the Asians... None of our Asian allies believe that Japan and Taiwan and so forth. And secondly, it just seems at some point ridiculous to say, "Well, we just lose the massive war that's happening in a place where we've planned for it to happen and where we have weapons systems that were literally built to deal with the situation." What were our tanks built for? Probably for a ground war in Europe, right? But if we don't do any of that, we're going to be great fighting some war against China, I don't know, without these tanks incidentally, I assume. And with other things, I'm all for built up in Asia too, obviously, and we're doing some of that... But so I just want to use that as A, do you agree, but also as a transition to sort of thinking about how much do you think

people are thinking about how should they think about the global character of the world at war that we're facing?

FRED KAGAN:

Well, look, on the narrow argument, yes, an argument against aid to Ukraine was that somehow we need to keep our powder dry and be ready to fight the war with China, and therefore we should be prepared to give up on Europe. We argued those on our side, argued that on the contrary, if you want to deter China, helping Ukraine defeat Russia is the best way to do that. Conversely, allowing Russia to win encourages Xi to attack. I would say our argument prevailed, and more people were swayed by the logic of what we had to say than by that logic of those who were saying that we should abandon Europe. Myself, it's always been straightforward, because it's not just Europe or Asia, it's... Dropping aid to Ukraine in order to be ready to fight China is saying, "We're not prepared to spend money to fight Russia, but we're prepared to spend blood to fight China." Because no one imagines seriously that Taiwan defends itself without US forces involved.

And so there's an asymmetry in the test of will, money versus blood. And then there's a whole bunch of other additional complexities, including the fact that Ukraine is actually a sovereign legitimate state the United States has a treaty with. We don't even recognize Taiwan as an independent state. That doesn't denigrate Taiwan's independence and sovereignty in any way, but it's an interesting position to take. So, that argument happily failed. I'll see if it's revived. It is being revived again a little bit. I actually saw a headline bizarrely saying this aid package ignores the China threat. So the amazing thing about this aid package, by the way, is that it doesn't ignore the China threat. It sends billions of dollars to Taiwan and it also encompasses the TikTok ban, both of which are massive defeats inflicted on China, almost *en passant*, with almost virtually no discussion or debate or argumentation.

If I were Xi Jinping, I would be pretty unhappy about that. But the aid package actually does address the China threat directly as well as indirectly, and I think that that's also important. And it's important because we are actually now facing a global entente of anti-American states, and that is: Russia, Iran, North Korea and China. Where Russia, Iran and North Korea are actively supporting one another with military equipment and military technology, sharing lessons from the Russia war. North Koreans have provided upwards of 3,000,000 artillery rounds to the Russians as well as rockets and missiles that the Russians are using. The Iranians of course, have provided the Shahed drones. And the Iranians are benefiting in turn from watching how the Russian drone and missile packages operate against Western systems.

One of the things we argued at ISW and CTP was that the Iranian attack on Israel mirrored some of the Russian drone and missile packages that they fired at Ukraine, which looks very much like the Iranians. And we know that there are some Iranians with the Russian forces watching how they're doing this are trying to learn and adapt the lessons that the Russians are learning. The IRGC-controlled media is now claiming that the Iranians have a version of the Russian Lancet drone, which is a loitering munition. But we've seen the Iranians claim that they have weapons that they don't actually have before, so I'll believe it when I see it actually work. But it would be an interesting concrete example of the Iranians actually gaining that kind of capability. We don't know exactly what the Russians are giving the North Koreans other than cover by vetoing the renewal of the North Korean sanctions monitoring program at the United Nations, which is a big deal, and a major Russian break on that issue.

I think it's very likely that the Russians are providing missile technology and know-how to the North Koreans, which is very alarming since the North Koreans, among other things, are trying to develop intercontinental ballistic missiles that can hit us and do various other things. The Russians are certainly giving them cash, which is a big deal. And I think the Russians are giving them food and other supplies. These relationships are growing. And the ISW and CTP both just reported out on a real intensive flurry of public discussions between Russian, Iranian, North Korean and Chinese officials leading up to an event in St. Petersburg where they were all present, but which has continued subsequently. This is an entente that is really coming together in a way that should alarm us quite a lot.

These countries disagree about a lot of things. They don't share a common ideology, but they do share a common enemy: us. And the thing that they agree on is that we are a major obstacle to their objectives and their plans, and therefore that it's in each of their interests to help the others take us down. That's something that we haven't really seen in a long time, certainly not meaningfully since we managed to split China from the Soviet Union. And it is beginning to look like the World War II Axis in ways that we could start to see similar kinds of behavior. In some respects, it's more integrated than the Axis ever was because the Germans and the Japanese really were not exchanging a whole lot of military technology and weren't doing much other than to both hating us.

These guys are really working together, and that should alarm us quite a lot. And I think this is another reason to understand why what happens in each one of these theaters affects this entire entente. So I've made this argument in a piece where I said, "You can't be an Iran hawk and a Russia dove," and you can't because Putin winning in Ukraine will strengthen Iran and will strengthen North Korea very directly, and not abstractly. Conversely, you can't be a Russia hawk and an Iran dove because the Iranians benefit and grow stronger and have more capability, the Russians will benefit too. And you can't be a North Korea hawk and a Russia or Iran dove either. We have to recognize that this is an entente that aims to take us down, and we have to be resisting every part of it. That's the world that we're living in.

BILL KRISTOL:

And I'm struck by your emphasis on, we can close with this, on the practical coordination among them. Someone like me, I don't really no one enough to judge that stuff, and so it's interesting sort as a intellectual and almost ideological matter you might say, to say, "They're working closely together. It's a different kind of world than we thought 10 or 20 years ago." I think that's true, and I don't think the meetings and the speeches and the votes at the UN and so forth are meaningless either, but I am struck by your emphasis and to maybe just say a word more about that just on how practically important it is. Certainly when you read stuff about the war in Ukraine, it seems like the Iranian stuff is been pretty important. And I don't know how many, 3,000,000 artillery shells, I don't know if that's a lot or a little. It sounds like a lot to me. So you can mock North Korea all you want as kind of this third world horrible backward place, but that's 3,000,000 more than we were living there for a while, right?

FRED KAGAN:

Oh my God, yeah. No, look, 3,000,000 shells is a lot. 3,000,000 shells is maybe half of what the Russians would like to use in a year.

BILL KRISTOL:

Wow.

FRED KAGAN:

No, it's a lot of shells. North Korea is... Look, I used to say truthfully that from Putin's perspective, it should be a warning sign that things are not going well for you when you have to go and ask for the help of a country whose GDP rounds to zero. But look, the one thing the North Koreans do have is tons and tons and tons of stockpiles of artillery shells because that was their strategy for how they're going to deal with the South, is they're just going to shell Seoul into oblivion. And they have been giving the Russians older shells, and that's been an issue for the Russians, which I've been enjoying watching the shells not perform and that kind of stuff, but there's still a lot of them.

The Shaheds make a huge difference because the Russians use the Shaheds in a very sophisticated fashion. They don't just use them as attack drones, because the Shahed is a fixed wing long range drone, and you can put sensors on it too, and they do. So the Russians also use the Shaheds as scouts. On the way to their final targets, they return a lot of information to the Russians since the Russians use them to conduct reconnaissance, do a whole bunch of things, which is why as they integrate them with the missile packages using Shaheds makes the missile packages more effective as well. And so the Iranians have given the Russians, I don't know, hundreds or thousands of these. And then the Iranians have helped the Russians build a factory to produce thousands of these in Russia itself. And these weapons make a big difference. But beyond that, here's a thing that... You probably know this, a lot of your listeners may not be aware of this. The Russians have a major manpower shortage.

So this is not the Soviet Union and Putin hasn't mobilized it the way that the Soviets mobilized in World War II, and he doesn't want to. So the Russians report that they have about a 5,000,000 person shortage in their labor pool. And at the same time, he's mobilizing hundreds of thousands of guys to go fight and taking casualties in the hundreds of thousands in Ukraine. Putin faces a one-to-one choice between having young men fight or having them work in the factories, and he doesn't have enough young men to do both. What he's trying to do is to use Iranian and North Korean, and to the extent that he can get the Chinese to do it, this Chinese labor, to offset his own manpower shortages so that he doesn't have to go to higher levels of mobilization and he doesn't have to make these very hard choices that he's trying to avoid making.

That should alarm us, because what does that actually mean concretely? It means that the Russians are looking to North Korea and Iran to do for them what we're doing for Ukraine, which is to sort of mobilize their defense industry on the behalf of the Russians. But at the end of that, I'm happy that European defense industry is mobilized because that helps us. I'm unhappy the extent to which this war has the Russians helping the Iranians and the North Koreans mobilize their defense industries because that will then give them a capability that they can then turn against us as well. So there's a lot of very concrete stuff going on. And I'm glad that you brought this up because, no, this isn't just a principled Hitler encouraging the Japanese and the Japanese encouraging Hitler, and, "We all hate the West together." No, this is a very concrete program of, in some cases, interoperable military activity.

Because the Russians have been fighting in an interoperable military coalition with the Iranians since 2015. It's been a decade that the Russians have been in Syria fighting alongside the Iranians and their proxies. There's nothing abstract about this. This is a very real entente. I'm calling it entente because there's no formal agreements in the non-alliance system here, so it's an understanding, it's an entente. But it's very real, it's very practical and it's very alarming. And it's something that really should cause us to take a fundamental re-look at the world today, where we think the world is going, and what

we think the United States is going to need to do to defend ourselves and our lives in the future.

BILL KRISTOL:

That's so important. Well, that's a good note to end on. And we'll have to come back and take that more of that re-look in a few months. And we know more about what's happening, obviously on the battlefield as well. But Fred, this has really been very enlightening, both as an update and thought provoking about the future. And so I really want to thank you for joining me again. And we'll have to do it again soon, I hope with maybe better news at the late in 2024. That would be very nice if they've turned the corner, so to speak. But Fred Kagan, thank you very much.

FRED KAGAN:

Thank you so much, Bill.

BILL KRISTOL:

And thank you all for joining us on *Conversations*.