

China and Russia's Strategic Problem

by George Friedman - August 15, 2022

The war in Ukraine, now about 6 months old, is strategically important for a variety of reasons. If Russia defeats Ukraine and takes control of the country, its forces will be on the border of Eastern Europe. A Russian presence on Europe's border would transform the balance of power in the Atlantic, and would thus inevitably compel the U.S. to deploy forces in Europe's defense.

What Russia's intentions were at the outset of the invasion matters little. Intentions change, and strategy must not be optimistic. So what is at stake in the Ukrainian war is the possible resurrection of the Cold War, with all the attendant risks. From the American point of view, engaging Russia through Ukrainian troops in Ukraine is far less risky than another Cold War.

The Cold War did not result in a full-scale war, only the fear of war. Western fears of Soviet intentions outstripped Soviet capabilities. Their fear, in turn, kept NATO together, much to the chagrin of the leaders in Moscow. Neither of their worst fears came to pass, and therefore the collapse of the Soviet Union had more to do with internal rot than external threat. It is not clear that any future Cold War would play out like the last one, but one thing is likely: Given the existence of nuclear weapons, the front line of a new Cold War would remain static, and the status quo on each side would remain intact so long as neither side fragmented. It would be a costly and dangerous outcome, since history need not repeat itself. But the collapse of Ukraine would pose threats that could be contained, however expensively and dangerously. The global pattern would remain intact.

China's vulnerabilities, and its attempts to overcome them, are potentially more dangerous. As with Russia, the core issue is geography. For Russia, the problem is that the Ukrainian border is less than 300 miles from Moscow, and Russia has survived multiple invasions only by virtue of Moscow's distance from invaders – a distance that the collapse of the Soviet Union closed. Russia's obsession with Ukraine is intended to rectify that problem. China's geographic problem is that it has become an exporting powerhouse, and as such it depends on its access to the Pacific Ocean and adjacent waters. The United States sees free Chinese access to the Pacific as a potential threat to its own strategic depth, something fundamental to the United States since the end of World War II. Chinese access to the Pacific is blocked by a series of island states – Japan, Taiwan, the Philippines and Indonesia, indirectly supported by nearby powers such as Australia, India and Vietnam. Not all of them are American allies, but all have common interests against Chinese naval expansion. China

wants to defend its strategic depth by seizing and controlling it. The United States wants to defend its strategic depth by defending it.

The geographic dimension is compounded by an economic dimension. China's economy depends on exports, and the United States is its largest customer. Beijing also needs continued U.S. investment, as its financial system is under intense pressure.

Russia is attempting to reclaim strategic depth, and it went into it knowing full well the financial consequences it would create. In other words, it put up with financial damage in exchange for strategic security. So far, it has not gained strategic security and has absorbed significant financial damage while meting out some of its own to Europe.

China is searching for a strategic solution while avoiding the economic damage that further expansion would likely invite. Its primary adversary on both fronts would be the United States. So China is probing the U.S., trying to understand its potential responses. The response to House Speaker Nancy Pelosi's visit pressed the limits of an invasion of Taiwan. What China learned about the U.S. military is unclear, but it learned that the trigger for American economic actions lies beyond the Chinese demonstration.

America's goal in Ukraine, then, is to deny Russia the strategic depth it wants in order to limit the Russian threat to Europe. With China, its goal is to retain American strategic depth in order to prevent China from threatening the U.S. or obtaining global reach.

The issues are similar in principle, but the stakes for the United States are not. For Washington, the China question is much more important than the Russia question. A Russian victory in Ukraine would redraw unofficial boundaries and increase risks. A Chinese success would create a more global power that challenges the U.S. and its allies around the world.

The consequences of war are always significant. U.S. involvement adds economic costs to the equation. So far, Russia has absorbed the costs. China may not be able to, considering its economy is currently vulnerable. But nations live on economics and survive on safety. In that sense, it would appear that Russia is less interested in negotiations than China is.

Chinese President Xi Jinping and U.S. President Joe Biden are scheduled to meet in mid-November, at a conference in Indonesia or in Thailand. If the meeting takes place, it will be the first since their teleconference in May. Only informal and back-channel talks are happening between the U.S. and Russia. China needs a stable economy now more than it needs command of the seas.

Russia seems able to survive what it has been dealt economically, but it has not broken the back of Ukrainian forces. China is nearer an economic crisis than Russia, and is thus unwilling to risk war with the United States. It will speak, if not settle. Russia's economic and military situation is murky in the long run. The United States is dealing with China and Russia at a fairly low price and can handle both right now. Russia and China must try to raise the cost to the U.S. but can't afford to raise their own.

It is a dizzying equation but not an uncommon one. China needs to reach an understanding with the United States. Russia does not have that need. The U.S. is flexible.

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