

Forecasting Russia

by George Friedman - July 5, 2023

The points below are drawn from my book, “The Next 100 Years,” which was published in 2009. In the points that follow, I try to explain how I reached these conclusions.

The United States in particular tends to first underestimate and then overestimate enemies. By the middle of the 2010s, the United States will again be obsessed with Russia. There is an interesting process to observe here. The United States swings between moods but actually, as we have seen, executes a very consistent and rational foreign policy.

In the long run, the United States dismisses enemies but, as tension rises, vastly overestimates them. Consider this cycle with China. Distance breeds a sense of security. The greater the contact, the greater the American tendency to underestimate itself and overestimate the opponent. Intimacy causes the United States to magnify problems. It also generates massive military spending to catch up to the enemy, which tends to shy away from direct combat.

It will matter a great deal where the fault line lies. If Russia’s resurgence is to be a minimal crisis, the Russians will dominate Central Asia and the Caucasus and possibly absorb Moldova, but they will not be able to absorb the Baltic states, or dominate any nations west of the Carpathians. If the Russians do manage to absorb the Baltics and gain significant allies in the Balkans, like Serbia, Bulgaria, and Greece – or Central European countries such as Slovakia – the competition between the United States and Russia will be more intense and frightening.

Russia’s need to move westward is hardwired into Moscow’s fears of attack by the West. Its interests span the area from the Balkans to the Baltics. But its primary interest must be to its west, to and past the Carpathian Mountains, the direction from which wars come. The U.S. interest is command of the seas – an interest that entails blocking the rise of major European navies. Russia has the distant potential to field a significant navy in the Atlantic and Pacific oceans. The United States therefore sees Russian defense as potentially offensive and is thus compelled to respond, primarily using allied ground forces for major combat while it controls air and naval forces.

In the end though, it won’t truly matter. Russian military power will be severely strained confronting the fraction of American military power that the United States decided to wield in responding to Russia’s moves. Regardless of what the rest of Europe does, Poland and the Czech Republic,

Hungary and Romania, will be committed to resisting Russian advances and will make any deal the United States wants in order to gain its support. The line therefore will be drawn in the Carpathian Mountains this time, rather than in Germany as it was during the Cold War. The Polish northern plains will be the main line of confrontation, but the Russians will not move militarily.

The idea guiding this forecast is that the nations most threatened by Russian power would ally with the United States to block Russian advances toward and beyond the Carpathians. For Russia, strategic depth is fundamental. Forecasting, then, requires diving into the imperatives of a nation. Russia's fundamental imperative is to create distance between itself and the potential enemy west of the Carpathians.

The causes that ignited this confrontation – and the Cold War before it – will impose the same outcome as the Cold War, this time with less effort for the United States. The last confrontation occurred in Central Europe. This one will take place much farther to the east. In the last confrontation China was an ally of Russia, at least in the beginning. In this case China will be out of the game. Last time, Russia was in complete control of the Caucasus, but now it will not be, and it will be facing American and Turkish pressure northward. In the last confrontation Russia had a large population, but this time around it has a smaller and declining population. Internal pressure, particularly in the south, will divert Russian attention from the west and eventually, without war, it will break. Russia broke in 1917, and again in 1991. And the country's military will collapse once more shortly after 2020.

Demographics will cause Russia to fail. Europe and America also have demographics problems, but they are able to overcome them through technology. Russia's technological prowess grants great advances in very limited areas, not in the broad spectrum needed. The United States brings to bear massive technologies that it shares with its allies. Russia must fight the type of war it fought in the past. In 1917, its exhaustion of manpower caused the government to collapse. In 1991, the Soviet Union collapsed partly because it was unable to compete with American military technology. Similarly, the war in Ukraine has imposed on Russia a primarily conventional conflict requiring large numbers of troops, which have incurred high casualties. I predicted the collapse of the Russian army because of its inability to create technology and field a large and trained military force. I am predicting the next phase of the collapse that began in 1991. Obviously, the Russian military is resilient, but then again, the U.S. entered the war overestimating Russian power.

The second essential variable is, as always, constraints. Russia can achieve its imperative by moving its border westward, thereby putting more distance between itself and its enemies. But it is

constrained by the size of its population and the vast number of men needed to initiate and sustain combat.

There are two keys to forecasting: a ruthless, objective understanding of imperatives, followed by an equal comprehension of constraints. It demands, in other words, an understanding of what Russia must have and raises the question of why it doesn't have it. Forecasting is for the simple-minded. The most obvious things are the most useful.

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