

Negotiations

by George Friedman - November 7, 2022

The United States has asked Ukraine to be open to negotiations with Russia, according to a report that was likely carefully leaked by U.S. officials. Since no one in the U.S. administration is denying the report, it's meant to be taken seriously by the Ukrainians. (Considering that the U.S. is not asking them to negotiate but only to be open to negotiating, it is nicely deniable.) Meanwhile, on Nov. 15, Chinese President Xi Jinping and U.S. President Joe Biden will both attend the G-20 summit in Indonesia. They will likely hold a meeting there, but if they don't, it would send a message about as clear as a post-meeting press release. Russian President Vladimir Putin has also been invited to the summit. He hasn't confirmed if he will attend but initially indicated he would not. His presence would open him to face-to-face hostility, or at least frigidity, from many attendees. Therefore, if Putin decides to come, and for more than the canapes, he would be attending in the expectation of some benefit.

A refusal to meet paints a leader as inflexible and responsible for the tension. A willingness to meet creates an expectation of some progress. If there is none but neither side wants to burn bridges, a cheerily incoherent announcement will be made. If a major breakthrough is announced, everyone will be shocked. The details of any meeting will be worked out to the letter before Biden and Xi meet, and will be carefully leaked to test responses at home.

There are three major and generally hostile powers that may be at the meeting. The U.S. will be there wanting a low-cost breakthrough with Russia and China. The leak about Ukraine would seem to be an attempt to get Putin to the meeting. He hadn't expected the leak so he didn't plan on coming. One question will be whether he changes his mind and tries to end the war over Ukraine's head. As for Xi and Biden, if they can't even sit down and have a drink, it would indicate that at least one side can't even set an agenda for the sake of appearances. And if Putin does come and ignores Xi, we aren't in Kansas anymore.

Let's consider Biden's message. The Ukrainians would willingly accept an agreement only if Russia withdraws from all of Ukraine and pays reparations. On the surface, this isn't going to happen. But without the United States, it would be very hard for them to wage war. And the problem with this war is that it is neither going anywhere nor ending. Russia seems to be weakening, but that's a long way from capitulating. Also the Ukrainian public has a breaking point somewhere, and the war has to end

before then. The message to Ukraine was: You may score more victories or you may not, but your chances of defeating the Russians outright are too low to bet on. At the same time, this war has turned out to be a Russian nightmare, not going at all as Moscow hoped – kind of like most wars. Russia has to want an out that doesn't look like a defeat.

Ukraine, and the United States, can't give on territorial integrity – Ukraine because it's an issue of its very sovereignty, and the U.S. because it has gone too far to allow a hint of weakness. This seems to make an agreement impossible. But there is a deal that might work, and it includes the following:

1. Russia withdraws all forces.
2. The United States withdraws all military support for Ukraine.
3. NATO guarantees not to accept Ukraine as a member.
4. A fund for rebuilding Ukraine is created under the U.N. using donations from NATO members, and would include Russia.

This would not prevent Russia from invading Ukraine again later, but it will be a while before it has the appetite for doing so. I don't know what deals Washington wants Kyiv to consider, but this is a possibility. And if Putin were to come to the meeting, it would, I think, signal something like this.

As I said, if Xi and Biden are in the same building and don't meet, it would indicate serious trouble. But I think both want to be there – Biden to get Putin nervous, Xi to try to shift relations.

Xi has just seen the U.S. performance in Ukraine, and it made him thoughtful. China has massive economic problems, many of which are linked to the United States. He needs more imports and investment from the U.S. As the recent embargo on advanced microchips indicated, the U.S. government has a lot of influence over trade, and its decisions can seriously hit China.

What the U.S. wants from China is a halt to hostile statements on Taiwan and the U.S. Navy's presence, as well as concessions in China's limits on U.S. exports. Beyond gestures, China has little interest in Taiwan. If Beijing was serious about invading, it would have attacked long ago. It didn't because failure was very possible. The U.S. will not end its presence but has no appetite for a war with China.

I think a meeting between Biden and Xi is likely, unless either side wants to look tough for negotiation's sake. But as I have said, a war between the two countries is not likely, and their economic ties are needed by both sides.

As for Putin, I doubt he will attend the summit, as it is not the venue in which he will want to make concessions. But if he does attend, he will be taking the Ukraine report seriously and asking about the terms of a possible deal. I think he will be allowed to claim he won something – even though he didn't. Ukraine will have its country but will fear Russia will strike again. And the Americans will do the usual: make charges against each other.

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