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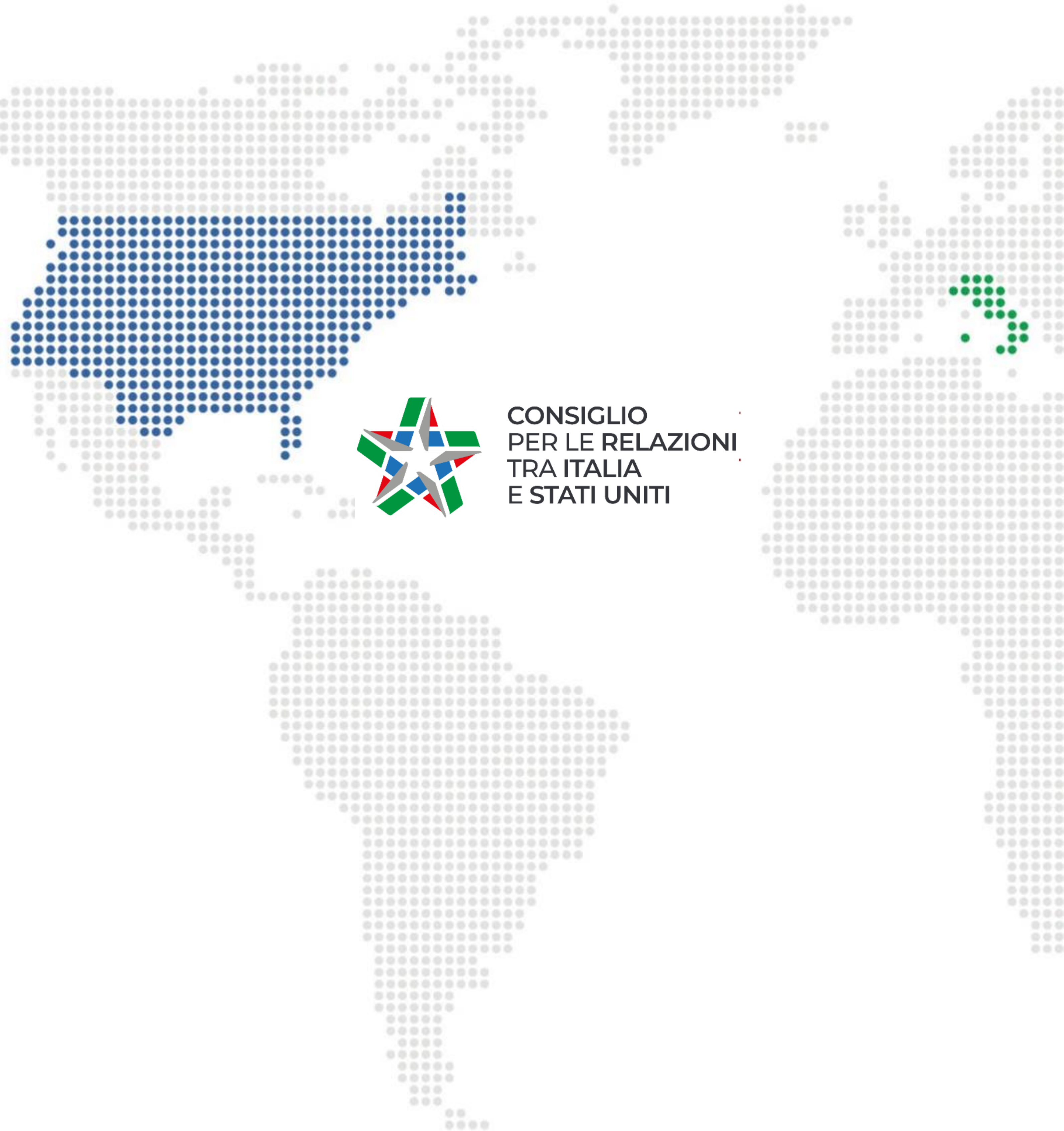

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ONLY CHINA CAN STOP RUSSIA

(Project Syndicate – Mar 7, 2022)

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As the Communist Party and its advisory body gather in Beijing this month, there has been little or no mention of the Ukraine war – a silence that is all the more deafening given China's deep-rooted sense of its unique place in history. With its unabashed great power aspirations, modern China may well be at a decisive juncture.

NEW HAVEN – With war raging in Ukraine, China's annual "Two Sessions" convey an image of a country in denial. As the Communist Party and its advisory body gather in Beijing this month, there has been little or no mention of a seismic disruption in the world order – an omission that is all the more glaring in view of China's deep-rooted sense of its unique place in history. With its unabashed great power aspirations, modern China may well be at a decisive juncture.

Two documents – the joint Sino-Russian cooperation agreement, signed on February 4 at the opening of the Beijing Winter Olympics, and the Work Report, delivered on March 5 by Chinese Premier Li Keqiang to the National People's Congress – encapsulate China's disconnect. The wide-ranging statement on Sino-Russian cooperation spoke of a "friendship between the two States [that] has no limits." It featured an almost breathless accounting of common interests, as well as commitments to addressing climate change, global health, economic cooperation, trade policy, and regional and geostrategic ambitions. The West was put on notice that it faced a powerful combination as a new adversary in the East.

Yet a mere 29 days later, it was largely business as usual for Li, who presented what is by now the annual Chinese boilerplate prescription for development and prosperity. A familiar list of reforms stressed China's ongoing commitments to poverty reduction, job creation, digitization, environmental protection, meeting demographic challenges, disease prevention, and a wide range of economic and financial issues. Yes, there was a widely noted tweak to the economic forecast – with a 2022 growth target of "around 5.5%" that, while weak by Chinese standards, was actually slightly stronger than expected – and some hints of likely policy support from fiscal, monetary, and regulatory authorities. But this work report was notable in saying as little as possible about a world in turmoil.

Yet China can't have it both ways. There is no way it can stay the course, as Li suggests, while adhering to the partnership agreement with Russia announced by Xi Jinping and Vladimir Putin. Many believed that Russia and China had come together in shaping a grand strategy for a new Cold War. I called it China's triangulation gambit: joining with Russia to corner the United States, just as the Sino-American rapprochement 50 years ago successfully cornered the former Soviet Union. The US, the architect of that earlier triangulation, was now being triangulated.

Yet in the span of just one month, Putin's horrific war against Ukraine has turned this concept on its head. If China remains committed to its new partnership with Russia, it faces guilt by association. Just as Russia has been isolated by draconian Western sanctions that could devastate its economy for decades, the same fate awaits China if it deepens its new partnership. This outcome, of course, is completely at odds with China's development goals just enunciated by Li. But it is a very real risk if China maintains unlimited support for Russia, including tempering the impact of Western sanctions, as a literal reading of the February 4 agreement implies.

The Chinese leadership appears to sense this untenable dilemma. After Russia's invasion of Ukraine was met by uncharacteristic silence from the Standing Committee of the Politburo, the top seven leaders of the Party, China has since underscored its time-honored fallback principle of respect for national sovereignty. At the Munich Security Conference last month, Foreign Minister Wang Yi stressed this point, along with China's long-standing insistence on non-intervention in other states' internal affairs – an argument that bears directly on Taiwan.

But, at the National People's Congress on March 7, Wang dug in his heels, insisting that "China and Russia will … steadily advance our comprehensive strategic partnership." It is as if Putin knew full well when he went to Beijing in early February that he was setting a trap for China.

Xi now faces a critical decision. He has the greatest leverage of any world leader to broker a peace deal between Russia and Ukraine. To do that, he needs to send a strong message to Putin that Russia's brutal invasion crosses China's own principled redline on territorial sovereignty. That means he will need to register a strong objection to Putin's efforts to rewrite post-Cold War history and resurrect Imperial Russia. To negotiate an end to the devastating conflict that Putin unleashed, Xi will need to put his February 4 partnership commitment back on the table as a decisive bargaining chip. Russia's prospects are bleak, at best; without China, it has none at all. China holds the trump card in the ultimate survival of Putin's Russia.

Xi's own place in history may be on the line, too. Later this year, the 20th Party Congress will convene in Beijing. The major item on the agenda is hardly a secret: Xi's appointment to an unprecedented third five-year term as the Party's General Secretary. China watchers, including me, have long presumed that nothing would stand in the way of this well-telegraphed outcome. But history, and the current events that shape it, have an uncanny knack of shifting the leadership calculus in any country. That is true not only in democracies like the US but also in autocracies like Russia and China.

The choice for Xi is clear: He can stay the course set by his February 4 agreement with Russia, and be forever tainted with the sanctions, isolation, and excruciating economic and financial pressures that come with that stance. Or he can broker the peace that will save the world and cement China's status as a great power led by a great statesman.

As the architect of the "Chinese dream" and what he believes is a great nation's even greater rejuvenation, Xi has no choice. My bet is that Xi will do the unthinkable – defuse the Russia threat, before it is too late.

PUTIN'S POTEMKIN MILITARY

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While defense spending accounts for a significant share of Russia's economy, the sum itself – an estimated $60 billion in 2020 – is rather modest, especially by "great-power" standards. In its war against Ukraine, Russia's military is putting the country's economic weakness on full display.

FLORENCE – War represents a contest of wills, the German strategist Carl von Clausewitz argued some 200 years ago. On this point, the Ukrainians fiercely defending their homeland seem to have a distinct advantage over the invading Russian forces. But, to win a war, will must be supported by military means – and that requires industrial and economic strength. Here, Russia might have an advantage over Ukraine for now, but it is far weaker than the West it ultimately aims to challenge.

In terms of economic and industrial strength, Russia is a mid-size power, at best. Its manufacturing output is only half that of Germany, and its GDP is about the same size as Italy's. The European Union's combined GDP is almost ten times larger than Russia's. And that is before the new round of punitive Western sanctions begin to take their toll.

Given its large economy, Europe can afford to build credible defense capabilities. For European countries to meet their NATO commitment to spend 2% of GDP annually on defense, they must increase spending by just 0.5% of GDP, on average. If one considers that total government expenditure in these countries currently averages 45% of GDP, this seems entirely feasible.

Even for laggard Germany, the recently announced short-term defense investment of €100 billion ($109 billion) represents only about 2.5% of GDP. Russia, for its part, probably dedicates more than 4% of its GDP to defense – a significant burden for a country that needs to maintain costly infrastructure to link its vast territory.

While defense spending accounts for a significant share of Russia's economy, the sum itself is rather modest, especially by "great-power" standards. Russia spent an estimated $60 billion on defense in 2020, compared to Germany's $50 billion outlay. At that spending level, and given the corruption that pervades Russian governance, building a large modern fighting force able to sustain a prolonged conflict, while maintaining an outsize nuclear force and advancing great-power ambitions globally, would be a truly astonishing achievement.

It is an achievement Russia cannot claim. In fact, it seems that Russia has had a Potemkin military all along. The "Potemkin" term is taken from Grigory Aleksandrovich Potemkin, the governor of New Russia who is said to have constructed fake settlements to impress Catherine the Great during her 1787 journey to inspect the newly acquired Crimea and surrounding territories. But the story of "Potemkin villages" is largely a myth, and historians disagree about what the czarina actually saw on her tour. It seems that, in reality, Potemkin made considerable investments in infrastructure in and around Crimea, but lacked the resources to link the newly conquered territory to the rest of Russia.

The resulting infrastructure weaknesses, together with a failure to build logistical capabilities, severely impeded Russia's ability to defend itself against English and other European forces during the Crimean War 60 years later. Reports that troops in Ukraine today are facing food and fuel shortages suggest that Russia did not learn its lesson. Logistics is always the area most vulnerable to corruption in the military.

Understanding the consequences of the Russian military's lack of resources requires us to look not only at what has happened in Ukraine, but also – and perhaps more importantly – at what has not. For starters, Russia has failed to destroy communications and other electronic-control systems.

It has long been widely assumed that Russia would support any military offensive with "devastating" cyberattacks. But this threat has not materialized, presumably because Ukraine has the support of Western intelligence agencies whose cyberwar capabilities are based on a vastly larger pool of talent and the know-how of US tech giants.

In fact, just a few hours before the invasion began, Microsoft detected – and blocked – malware aimed at wiping data from Ukrainian government ministries and financial institutions. The company subsequently shared the code with other European countries, in order to prevent its further use.

Likewise, SpaceX has sent Starlink internet terminals to Ukraine, in order to offset internet disruptions in the country. Making the satellite-internet system operational in the country will take time, because a large number of base stations must be put in place. But this is a question of weeks, not years.

Another Russian dog that did not bark is the air force, which has not established control of Ukraine's airspace, even though Russia has almost ten times as many planes as Ukraine does. Yes, Russia deployed a barrage of missiles to knock out radar and airfields on the first day of the invasion. But the first volley was not followed by a second, because Russia's stockpile of precision-guided missiles and other expensive ordnance is limited.

Moreover, Russia's pilots appear to have little experience – probably because, like precision-guided weapons, effective pilot training is expensive. And, finally, crucial weapons-delivery systems are not up to date.

Putin could have gone into this war with a large supply of precision-guided missiles or with a large stock of foreign-exchange reserves. He chose the latter. Now that half of those reserves have been blocked by unprecedented Western sanctions, he is probably regretting that decision. Given Russia's limited capacity to ramp up weapons production quickly – especially production of sophisticated weapons systems, which require inputs he can no longer source from abroad – Putin's prospects for sustaining his war in Ukraine seem limited.

In a struggle between two equally motivated opponents, broad economic and industrial strength is decisive. Putin has launched a war from a weak material starting point. He has motivated Europe to start investing in its own defense. He has set Russia on a course of demoralizing economic decline. And, above all, he has motivated Ukrainians to fight fiercely for their freedom.

If the Ukrainians manage to hold out against the initial onslaught, their determination, together with potentially unlimited Western support, could turn the tide of Putin's war – and of Putin's regime.