

George Beebe: Iran War Weakens Ukraine & Europe Remains Irrational

George Beebe is the former CIA Director for Russia Analysis and currently Director of Grand Strategy at the Quincy Institute. Beebe discusses why the Iran War incentivises Ukraine and the West to put an end to the war, yet the Europeans remain determined to keep the war going. Read Responsible Statecraft: <https://responsiblestatecraft.org/> Follow Prof. Glenn Diesen: Substack: <https://glennDiesen.substack.com/> X/Twitter: https://x.com/Glenn_Diesen Patreon: <https://www.patreon.com/glennDiesen> Support the research by Prof. Glenn Diesen: PayPal: <https://www.paypal.com/paypalme/glennDiesen> Buy me a Coffee: buymeacoffee.com/gdieseng Go Fund Me: <https://gofund.me/09ea012f> Books by Prof. Glenn Diesen: <https://www.amazon.com/stores/author/B09FPQ4MDL>

#Glenn

Welcome back. We are joined by George Peavy, a former CIA director for Russia analysis and currently the director of grand strategy at the Quincy Institute for Responsible Statecraft. I'll make sure to leave a link in the description. And yes, as always, thank you for coming back on. It's my pleasure, thank you. I wanted to ask you—as we now see the war in Ukraine and the war in Iran—it's becoming more and more interlinked, it seems. Especially if we look at the reports today from, I think it was the Wall Street Journal, saying that because of the weapons shortage, there have to be some difficult decisions about whether to divert American weapons away from Ukraine and toward the war in the Middle East. But again, I guess the consequences of the Iran war on the Ukraine war, and also for Russia, go far beyond this. I was wondering, how do you see this? To what extent does the war with Iran impact the strategic balance between Russia and NATO in Ukraine?

#George Beebe

Well, I think it has a number of effects. First of all, it definitely affects how many weapons we have available to provide to Ukraine. Now, of course, the United States made a change under the Trump administration, where we've been providing military aid to the Ukrainians through Europe. So the Europeans are actually purchasing American weapons and then, in turn, transferring those to the Ukrainians. But we simply don't have enough of some key weapons systems to provide.

#George Beebe

For Ukraine's needs. And I think the most acute problem comes in air defense. That was a problem even before the Iran war. The Russians, through their missile, drone, and glide bomb attacks, were putting extreme strain on Ukraine's air defense capabilities and drawing down the reserves of air

defense missiles that we could provide to help them defend themselves. But with the operation in Iran, the longer this goes on, the result is going to be an absolute emergency situation for Ukraine's air defense capabilities. And that, I think, bodes very ill for Ukraine—its battlefield prospects won't last very long if this war continues.

So that gives Ukraine, I think, a battlefield reason to seek an end at the negotiating table sooner rather than later. The other thing this war does, I think, is it really interferes with the strategy that the United States, Europe, and Ukraine have long had—to try to squeeze Russia's energy earnings internationally and, in so doing, incentivize Russia to compromise and agree to end this war on terms that are at least perceived as equitable and reasonable, rather than a capitulation of Ukraine to Russia's terms. And because the international energy situation is approaching a crisis point as a result of the war with Iran, that strategy of trying to keep Russian energy off the international market is just not viable, and we're already seeing this.

The Trump administration first indicated to India that we would not object to Indian purchases, as we did several months ago. The Trump administration has provided at least a short-term relaxation of sanctions against Russian energy sales more generally. I think it's almost inevitable that that one-month relaxation is going to move on to two months, then three months, and probably become permanent, simply because the pressure on international oil markets is so great and the U.S. economic situation looks so precarious that we can't afford to continue that old strategy of trying to squeeze Russia's energy earnings under these circumstances.

And that also, I think, is another reason for Ukraine to seek a compromise sooner rather than later. The other thing this does is, because of the increased oil prices, Russia is benefiting from a short-term windfall of energy earnings. That, in turn, means their ability to sustain this war economically is that much greater—at least over the short term, as a result of the war in Iran. So the Russians aren't under any particular economic pressure right now to cut this war short, and it's very likely they won't be for some time to come.

#Glenn

Well, I thought for this reason there could be a silver lining, or at least something positive to come from this war. That is, when we're losing a war, the way it's usually resolved is by shifting focus to something else. We often seem to focus on only one thing at a time. We had Russiagate, and then that seemed to end with COVID, and then COVID ended when Russia invaded Ukraine. So it seemed like there could be an opportunity to bring this war to an end. But even now, as we face this massive crisis with shortages of energy and fertilizers, you'd think that would create huge pressure—not just on Ukraine and the U.S., but also on the Europeans—to put an end to this war.

Yet we see now that the Europeans appear to be advising Zelensky not to take the deal presented by the Americans—that is, to pull out of Donbass and accept neutrality. Indeed, we've even seen attacks during the night on Russian oil facilities on the Baltic Sea, which appear to have drones

either transiting through or originating from the Baltic states. Now, again, there's a lot of uncertainty about this. I don't want to say anything too definite, but at least the Europeans advised Zelensky not to put an end to the war. How do you explain that? Because it looks like the Europeans are the ones who will get hit much harder than the Americans in this coming energy crisis.

#George Beebe

I agree. I think, to a great degree, the Europeans are the big losers in this war in Ukraine because of the disproportionate impact it's having on their energy situation. And they don't have good alternatives. A rational actor in Europe would look at this situation and say, "You know what, we're going to have to buy Russian energy. There really is no other way out of the circumstances we find ourselves in right now." But I think what's actually going on is that the Europeans are looking at the situation and saying, "Well, if we can hold on, if Ukraine can hold on, if we can manage to get through the next several months, the political situation in the United States is likely..."

I mean, I think their calculation is that all of this could greatly undermine President Trump's political situation and lead to growing unpopularity—a defeat in the midterm elections in November. My guess is that what the Europeans are saying is that, rather than make what they regard as a very unwelcome compromise to end the war in Ukraine, they're hoping they can just hold on through the next several months, and then the political circumstances, they hope, will change. Trump would then not have the ability, politically, to drive this peace process and see it through to the end. And then, who knows what could happen? The future is very unpredictable. So I think it's an unwise bet on their part, but I think that's what's going on.

#Glenn

Yeah, well, often when the Europeans look toward the U.S. and the extent to which it engages in this war against Russia, there's always this assumption that the U.S. has all the capabilities it needs—the only thing missing is the will. Which is why they might go for waiting out Trump yet again. But you used the word "rational." If you were being rational, you'd seek to negotiate an end to this war. Do you see the European leaders as being irrational here, though? If so, why? Is it ideology? A lack of political imagination? Do they simply not have any other solutions? How do you explain this? Because I often make the point that I can understand all the different actors. I understand why the U.S. initially went very hard into this war. I understand why they now want to distance themselves. I understand why the Russians see this as an existential threat. I understand why the Ukrainians see this as an existential threat. But I can't ever really make proper sense of the European position.

#George Beebe

Well, I do think this is largely irrational. It's driven in part by wishful thinking—you tend to see what you want to believe. And I think, in part, it's a lack of imagination: that if they do compromise with Russia on big geopolitical issues, on the future of NATO enlargement, that might undermine the

entire European enterprise and bring the European Union into disarray, leading to disunity in Europe in a profound way. To some degree, Russia has been a unifying factor within Europe. When you face a common enemy, that shared sense of threat can bridge a lot of differences that might otherwise be more significant. And I think, to some degree, the Europeans don't want to let go of that threat.

They have a political interest in peace—continuing to see a Russian threat. And rather than trying to manage and mitigate that threat, I think they'd like it to continue because it's politically useful for them in a lot of ways. Also, from their point of view, it keeps the United States in Europe, keeps the United States in NATO. Now, I think a lot of this is an inaccurate perception—a lot of it is seeing what you want to believe. So there's an element of belief, of self-delusion, in all of this. And I think it's going to backfire, frankly. It's an unwise approach. But it's never easy to explain things that appear irrational—that's always a challenge.

#Glenn

Well, how do you see the possibility of how Russia might respond to all of this? Because you hear stories about pressure mounting in Moscow—that they should essentially do what the Iranians have done, that is, to assert their deterrence. They've let their own deterrence slip over the past four years, to the extent that, you know, in the West we can launch missiles into Russian cities and there don't seem to be any consequences.

You gave an interview, I remember, back in December 2021—I think it was for Radio Free Europe—when you warned that a war could come if the Russians saw inaction as becoming more dangerous than action, in terms of the West cementing its position within Ukraine. That this would be their last chance to dislodge NATO. How do you see the calculations in Russia now? Because, on one hand, the Americans are tied up in the Middle East, the Europeans appear willing to escalate, and again, it appears there's all this pressure on the Kremlin that they should start taking a tougher line. Do you think they could, I guess, escalate in a much greater way?

#George Beebe

Well, I think it's possible. And I think there are those in Moscow making the argument that the United States is not actually agreement-capable, that Trump can't be trusted. They look at the performance of Trump's envoys with Iran—who are the same envoys the Russians are dealing with on the Ukraine settlement process—and see what appears to them as bad-faith negotiations with Iran. And they wonder, can we trust Trump and his envoys to negotiate in good faith with us? So that's one of those elements of doubt among opponents of a compromise in Russia—people saying, look, we should just go all out, win this war, and reestablish deterrence. I think that's part of what they're arguing right now.

I think they're also saying, "We've got a window of opportunity. The United States is distracted—it doesn't have the capacity to both wage a war in Iran and supply Ukraine with what it needs. Europe

doesn't have the economic wherewithal to support the Ukrainians under these circumstances. So let's seize this window of opportunity." Now, although that view exists in Moscow, I don't believe it's the unanimous opinion. As far as I can tell, Putin isn't there yet. And I think the reason is that he doesn't want to give up the possibility of détente with the United States—of normalizing relations, of entering into negotiations over European security and strategic stability.

These are all very important goals for Russia. It advances Russia's position in the world to have a normalized relationship with the United States. It allows Russia a lot more geopolitical room for maneuver vis-à-vis China, helps ensure that China isn't simply going to become, you know, the dominant partner of Russia while Russia is left as a subordinate junior. And a lot of those big European security issues for Russia can't be resolved just by, you know, taking the rest of the Donbass or even seizing Odessa and turning Ukraine into a landlocked rump state. So I don't think Putin wants to give up on the possibility of a deal to end the war in Ukraine and all of the improvements in the U.S.–Russian relationship that he expects would flow from that.

Now, what would change his mind, I think, would be a belief that an improved U.S.–Russian relationship is simply not going to happen regardless—that Trump is so weakened, or that Trump really isn't intent on a real normalization of the bilateral relationship. In that circumstance, I could see the Russians saying, "Well, we're only giving up something that isn't going to happen anyway. So let's win this war and really use the military capabilities that we have but have been reluctant to bring to bear, because we didn't want to close the door on normalization with the United States." I don't think Putin is there yet. But could he get there? Sure. I could see that happening. And I think we're going to find out the answer to that in the next few months.

#Glenn

Yeah, I don't think there's necessarily any pressure to pick one path or the other just yet, because even if Trump is a bad-faith negotiator, as long as Russia doesn't let diplomacy influence its strategy on the battlefield, it could still pursue the diplomatic path even while continuing to make advances there. But another way this war in Iran could affect the war in Europe is that NATO itself is coming under great pressure. You probably saw the press conference where Trump was answering questions and making the point, more or less, that NATO would regret not joining the campaign against Iran. It almost sounded like an announcement of a divorce coming in the future—like, "Just wait a few months, you'll see, remember this." What do you think? Could this be used as a way to untangle the U.S. from NATO, or is that not really in his interest? Is it more just to put on the pressure?

#George Beebe

Well, I think there already was, in the transatlantic relationship, growing distrust and tension between Washington and its European allies to varying degrees. But I think the Iran war has really exacerbated those pre-existing tensions. And I think we're in a situation where Trump turned to the

NATO allies and said, "We need your help. You benefit disproportionately from oil that's shipped through the Strait of Hormuz. You should come help us open the strait." And the answer he got from our allies was basically, "No, not our problem." So I think the perception in the White House is, what good are these allies?

Why are we providing all this security support to them, which has underwritten their safety for so many decades? And in our time of need, they're not coming to our assistance. This is a one-way relationship, and we're not benefiting. Now, I think from the European perspective, they look at the situation and come to almost the opposite conclusion. They see what the president has done vis-à-vis Iran as putting Europe in peril. They believe that Trump has, to a large degree, created a crisis over the Strait of Hormuz because of a lack of foresight, a lack of adequate planning, a lack of envisioning things that were obvious to a lot of experts for a long time as potential consequences.

And having created the crisis, he then turns to Europe and says, "Help bail us out of this situation. Put your ships and your soldiers in peril in so doing." And by the way, he's created an extraordinary energy crisis—an economic crisis—for Europe. So what good is America's protection in all of this if you're not actually enhancing European security? You're undermining it. To me, this has the makings of some very, very serious strains in the alliance that aren't going to go away, and probably will get worse over time.

#Glenn

I'm wondering if Trump would have informed the Europeans before the attack—whether or not they would join in—if they might have gotten more commitment. Because you saw in the early days of the bombing that the Europeans were lining up to support, especially people like Chancellor Merkel, you know, when they thought it would be more successful than it was. But by not getting their commitment early on, they could wait and see until it began to run into problems. And then, once it seemed like a, well, dangerous proposition, they would decline.

Yeah, I think this could have been a mistake. If he had consulted them early on and gotten their commitments before it all went south, I think he would have been able, especially with Merkel, to get her on board. But what does this mean, do you think, for the possibility of peace now—not just in the Middle East, but with Europe and Ukraine? Because last time we spoke, you said there was still a window of opportunity to end this at the negotiating table, but that window's closing.

#George Beebe

Is it closing still, or is it opening up? No, I think the window of opportunity is still there, but I do think it's closing. I don't think it's going to extend much beyond this summer, quite honestly, because at that point the political calendar changes things, and I'm not sure the window for compromise will stay open much beyond early fall of this year. I still think both sides have incentives. The Ukrainians have a very strong battlefield incentive to get what they can right now

before the situation gets much worse. I think the Russians have an incentive to try to get a deal while Trump is still agreement-capable.

I think Trump needs a win. The Iran operation has been very bad news for him politically and for his foreign policy more generally. In this kind of situation, it makes a lot of sense to try to get a win by bringing the Ukraine negotiations to a successful close. My guess is that the Trump administration is likely to tell the Ukrainians just that: you know, now is the time. You've gotten everything you needed. You're not going to get more. This is as good a deal as you're going to get. Take it now, because the alternatives are going to be much worse.

#Glenn

But why does it have to close then? What are the main reasons you think the window of opportunity for a diplomatic settlement would be over after summer?

#George Beebe

Well, I think the Russians will become disillusioned with the Trump administration's ability to bring this across the finish line. And I think they're going to have growing doubts about whether the United States is actually serious about a normalized relationship, and whether the Trump administration is even capable of normalizing that relationship with Russia going forward. I think the longer this war goes on unresolved, and the longer the war in Europe and Iran goes on, the more doubts the Russians are going to have about those things. So that's part of it.

And then the other part of this is patience on Trump's part. I think we could reach a point where he becomes disillusioned and thinks we're just not going to get the sides to come together. When or if he reaches that point, I don't know—nobody can predict that sort of thing. But I don't think the patience in Moscow and Washington will be infinite. And then, on the Ukrainian side, the dilemma they have is whether they want to play a waiting game and hope that the circumstances in Washington will be more favorable for them six months from now. And that's also the issue with the Europeans.

#Glenn

Last question. There have been some media reports that the Russians are aiding the Iranians, and while I just assume that's the case—it would make sense—it's also something that Zelensky has been pushing very hard to, I guess, direct Trump's fury toward Russia, as opposed to using all these weapons only against Iran. To what extent do you think this could impact relations? Because so far, Trump has seemed a bit dismissive. He probably knows it's correct, but he doesn't want to disrupt the possibility of, well, the diplomatic process. Do you see this possibly escalating out of control, or that the Russians would start sending more heavy weapons? You know, I'm not sure what possible cards the Russians could play, I guess, to return the favor after all the past four years—especially

not so much against the Americans anymore, but more against the Europeans, the Germans, and the British in particular.

#George Beebe

Well, it would be very difficult for the United States to argue that Russian intelligence provided to Iran, which might be used to kill Americans or target our forces, is wrong in principle. The Russians would quite quickly say, "This is exactly what you've been doing to us since early 2022." And I think Trump understands that. The real question is whether the opponents of a compromise deal in Washington and in Europe seize on this issue and hype it in ways that create big political problems—big obstacles to a deal—and create an environment in which Trump has much less room for maneuver vis-à-vis Russia and the endgame of a Ukrainian peace deal.

And that's possible. I think it's already clear there's an awful lot of media attention on this issue, and I don't think that's accidental. The people trying to focus attention on it are doing so because they see it as a way to make a deal or a compromise in Ukraine less likely, and to put obstacles in the path of normalizing the U.S.–Russian bilateral relationship.

#Glenn

Well, there's a lot of pessimism these days, so I'm very happy to at least hear some optimism from your side about the possibilities—the lingering possibility of having some diplomatic path forward. So thank you very much for taking the time, and yes, enjoy your days in Geneva.

#George Beebe

Great.

#Glenn

Thank you very much.