

## Q&A

# Stephen Walt on the Underweighted Risks of 2023

A realist POV on the war in Ukraine, competition with China, COVID, and more.

By Ravi Agrawal, the editor in chief of Foreign Policy.

FOREIGN POLICY

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*Last week, FP columnist Stephen Walt gave the Biden administration a B- on its foreign policy in 2022—with an “A” for effort. In part 2 of a Foreign Policy Live discussion with me, Walt looked ahead to 2023 to game out the war in Ukraine, elections in Turkey and Poland, and how protests in China might pan out. FP subscribers can watch the full video interview in the box above. What follows is a highly condensed and edited transcript.*

Foreign Policy: So, this is the interview where one year from now everyone’s going to point to us and say, “Wow, they were so wrong.”

Stephen Walt: I always remind myself that if you look at the last several U.S. presidencies, almost all of them ended up having to wrestle with issues they never anticipated at all. George W. Bush did not see 9/11 coming. Barack Obama did not see the Arab Spring coming. Donald Trump didn’t see COVID coming. So, any attempt to forecast the future is fraught with peril, but I think we can tackle the risk ourselves anyway.

FP: Let’s begin with this: What risk are we underweighting the probability of occurring in 2023? In other words, what is the one thing you think we should be worried about, but we aren’t publicly talking about it much?

SW: I think we are underweighting the possibility of failure in Ukraine. I worry that in supporting Ukraine and in hoping for the best outcome, we are understating the possibility that a year from now, [Russian President] Vladimir Putin is still in power, the Russian military is actually doing well, the Ukrainian forces are at the end of their strength, and this suddenly looks like a much different conflict.

FP: On that note then, what do you think is the most likely outcome of the current war in Ukraine?

SW: The base case for the next year is a stalemate, where neither side is able to make substantial military gains against the other, with one caveat being that Ukraine itself will have suffered more damage and destruction in the process. But if you ask me what I think is the most likely situation, it’s going to be a protracted and hurting stalemate for both sides, where neither is willing yet to compromise and where peace talks, even if they begin informally, indirectly or face to face, find it very hard going because both sides are sufficiently incompatible and are likely to remain that way for quite some time to come.

FP: One thing that isn’t clear to me is how much pain Russia is actually sustaining, and when will economic sanctions really bite?

SW: The amount of pain that the average Russian is suffering is not that great. It’s not trivial, but thus far, partly through continued oil and gas sales, partly through intelligent macroeconomic management, they’ve been able to limit the direct pain. It’s not as though people living in Moscow are suffering the same way that people living in Kyiv are suffering. I don’t see much of a sign that

political pressure is going to force Putin to fold his tent and go home. Secondly, we certainly know the damage that the Russian military has suffered. We also know that they continue to be able to fight. They continue to be able to pound the Ukrainian positions with lots of artillery. They have been able to conduct some operations, including the withdrawal from Kherson, and withdrawal under fire is a very difficult military operation to perform. They were able to do that rather competently as well. I am not willing to believe those who say that the Russian military is teetering on the edge of collapse.

Stephen Walt on How 2022 Changed the World And why the Biden administration gets a B-minus for foreign policy.
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Over the longer term, I think this is going to be a significant setback for Russia that we will look back 20, 30 years from now and say this was a moment at which Russian power peaked and it went into even steeper decline as a result of the consequences of Western sanctions, the consequences of the damage Russia has already suffered. In that sense, the war remains a great geostrategic blunder on Putin's part.

FP: What's your sense of how a Republican House [of Representatives] in the United States might impact funding and arms for Ukraine in the next year?

SW: I don't think they're going to put substantial limits on it. I don't think cutting off Ukraine is a politically marketable slogan for the next year or so, and their control of the House is not so overwhelming that you're not going to get some Republican defections there. I think a much greater issue is going to be the fact that the United States and others have drawn down their own weapons stockpiles, and it's going to make it harder to maintain the same level of support for Ukraine. Even if there's full political support for it, there just may not be enough stuff left in the pipeline, and at some point, the U.S. military will say, "You can't completely disarm us in order to aid the Ukrainians."

FP: There are lots of elections coming up in 2023, including in Nigeria, Finland, Thailand, Pakistan, Argentina, and Bangladesh. I'll pick two others to ask you about: What should we expect when Turkey and Poland go to the polls?

SW: I've learned never to bet on U.S. elections because I only lose money when I do, and I'm not going to bet on either the outcome of Turkey or Poland. But what's interesting about both of these cases is that these are two countries who have been somewhat disruptive members of their various alliances. Turkey within NATO and Poland within the European Union, but to some degree also in NATO as well. And they're both led by governments that have been losing popularity—in [Turkish President Recep Tayyip] Erdogan's case because of his mishandling of the Turkish economy, and in the Polish case for a variety of different reasons. And in both cases, these are governments that in the past have used foreign policy as a way of rallying their base, distracting people from economic problems. I worry that in the run-up to these critical elections, you're going to see the Law and Justice party in Poland doing things like picking a fight with Germany, or in the Turkish case, picking a fight over the Kurds, or Finnish or Swedish entry into NATO—various foreign-policy efforts to distract voters from the fact that the inflation rate is 80 percent. I don't know who's going to win the elections, but I do expect the behavior of both countries to be somewhat erratic on foreign-policy terms because of the domestic political contest that's underway.

FP: Do you foresee any big climate change policy movements on the horizon in 2023?

SW: There won't be any big breakthrough in the next year. It's important because we are more likely to see the kind of unpredictable weather events, such as the floods in Pakistan, that suddenly have political consequences for them. So, you can't forecast exactly which country might get hit by a climate change-related event, but I'd be willing to bet a fair amount of money that some country somewhere is going to face an unexpected set of disasters, and then that will then have ripple effects.

FP: Let's look at Israel. How do you think an extremist religious government under [Prime Minister] Benjamin Netanyahu might deal with the Biden administration?

SW: [U.S. President Joe] Biden represents himself quite genuinely as a very strong friend of Israel, and the administration has not been especially critical of the Israeli government despite the increased violence on the West Bank and despite the emerging character of the new government in Israel. They have not been outspoken of it.

With this emerging government, it's going to be a difficult relationship. There won't be a lot of warmth between them. I don't think Biden wants to have a public fight with Israel, because that's not good domestic politics here in the United States, but I don't think you're going to see the affection or warmth that you've gotten at times between some U.S. administrations and some Israeli governments.

The wild card here is Iran because we're not going to get a new nuclear deal. If suddenly the Biden administration is confronted by an Israel that is really worried about Iran's [nuclear] progress, or by Saudi Arabia or the Gulf states that are worried about Iran's progress, and they all come to Washington and say, "What are you going to do about this?" That is going to put the Biden administration in a very awkward position because they're already at odds with Russia and Ukraine, and they're waging an economic war with China.

FP: Zero-COVID has now been lifted in China, largely. Cases are on the rise. Where do you see COVID headed in China in 2023?

SW: Well, I'm not an epidemiologist, but it's going to continue to be a concern for them, compounded by the fact that they have a pretty dramatic economic slowdown, partly pandemic-related, partly an inevitable consequence of the development of the Chinese economy and some mistakes they've made in the past.

The Chinese economy is going to continue to face headwinds in the next year. We are not going to see the world economy suddenly come roaring back in 2023. In that sense, the United States' economy has done relatively well, if you compare it to Europe. But if you start looking at what the United Kingdom is facing, what the continent of Europe is likely to face, what China is facing, it's going to be a slow year, and that's ultimately hard for China, given that it is still pretty dependent on its engagement with other economies.

The final complication for them is we don't know where these demonstrations are ultimately going to lead. They were clearly provoked by widespread anger at the zero-COVID restrictions, which are now being relaxed, but they seem to have had more to them than just that. This became an opportunity for Chinese to suggest that they weren't wildly happy with the repressions that had been intensified under [President] Xi Jinping. I don't think 2023 is going to be a particularly easy year. If Xi thought [that] his coronation as China's unchallenged leader was going to usher in tranquility, I think he's going to be disappointed.

One final point that bears on the situation in China, but also the protests in Iran, is there's some pretty good research done by my colleague Erica Chenoweth showing that civil disobedience of this kind, widespread protests, have become less effective than they used to be. They used to be a quite effective form of forcing political change, but authoritarian governments have gotten better at figuring out ways to diffuse or disarm or suppress these protests. They ultimately didn't work in Belarus. Ultimately, they may not work in Iran. So we're seeing these outpourings of popular protest, but we shouldn't assume that they're as likely to succeed as they might have in the past. It's also worth remembering that the Arab Spring ultimately didn't produce a lot of lasting political change, either.

FP: I want to ask you about where you see the U.S.-China relationship moving in the next year. Does a GOP-led House have any impact? Are there any other twists to the relationship you might want to predict in 2023?

SW: There was a reasonably constructive meeting between Xi and Biden at the Bali [G-20] summit. Obviously, it was not a breakthrough, it was not a sudden detente, but it was a cordial conversation and there were some positive developments of “let’s start to take ourselves out of the icebox and start cooperating on areas where we share interests.” I think the midterm elections are going to have almost no impact here because confronting China is a bipartisan issue. It’s one where most Republicans and most Democrats agree that China needs to be dealt with more forcefully.

My one concern is that I can easily imagine future Speaker Kevin McCarthy deciding to follow in the footsteps of former Speaker [Nancy] Pelosi and saying that he wants to fly off and meet with his counterparts in Taiwan. This is grandstanding. It doesn’t actually enhance Taiwan’s security, but if Pelosi did it, why can’t he?

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