

What Russia Wants / Summit Coming? / India, Brazil Fed Up With Tariffs

An assessment on the recent meeting between Mr. Witkoff and Vladimir Putin, Mr. Trump's pronouncements of a coming summit meeting, and the US tactic of playing out its friends and foes equally against each other. Our Shop: <https://neutralitystudies-shop.fourthwall.com>

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Hello everybody, Pascal here from Neutrality Studies, and today I would like to discuss with you some of the newer developments between Russia and the US, and also the US strategy of using ever more tariff threats in order to put pressure on the global system—either to deal with Russia or to increase the amount of money that the United States can squeeze out of its trading partners. But let's maybe start with the visit that happened between Mr. Vitkov and Vladimir Putin.

So yesterday, on August 6th, Mr. Vitkov met with Mr. Putin, and he did so reportedly for three hours, which is a very extensive period of time, especially for a meeting with a head of state by someone from Ukraine—by somebody who is not a counterpart. But it shows that Vladimir Putin definitely attaches a lot of value to Mr. Vitkov and to the fact that Mr. Vitkov is the personal envoy of Donald Trump; that he is not just an ambassador of the United States, not just a representative, but the direct liaison to Donald Trump. Hence, it is apparently, in the view of Mr. Putin, appropriate to spend a lot of time in order to discuss.

And as we know Mr. Putin—and I will show you this later as well—he probably also used the time to extensively recapitulate the entire affair, because that's something he has been doing time and time again: going back to the history of the conflict. So one part of the long time spent with Mr. Vitkov might be explainable through Mr. Putin's own affinity for the history of the conflict. Now, yesterday we were still waiting for the reaction from Mr. Trump, because Mr. Vitkov would, of course, first go back to Washington and then brief Trump directly—or brief him while on the airplane, but brief him after the fact. And Mr. Trump actually didn't give us very much, other than that he thinks there was progress made again.

Now, "progress made" and this empty rhetoric from Washington mean nothing. And we know about the Trump administration by now: it can change its assessment and its rhetoric and its speech acts over the course of a night, or even less. But at this point, Mr. Trump is even hinting at the possibility that we might see a meeting between him, Mr. Zelensky, and Mr. Putin. I must say, we have no confirmation about this from the Kremlin, and I honestly don't—I doubt it. I doubt very much that

this was in any way, shape, or form part of the discussions with Mr. Putin, because we have several times Mr. Putin on record who said very clearly, before a meeting between the leaders makes sense, you need to discuss the details.

The leaders are there in order to agree on the framework, but the details need to be solved first. So I interpret this as another one of these statements that is meant more for domestic consumption in the US and in Europe than as an actual plan for what can happen with Russia. It's also part of something that is very annoying to me, which is this public display of every single step of diplomatic rapprochement, where the United States is basically conducting everything out in the open. Instead of giving us details of the content, we are always getting headlines about what the next steps are and how likely it is that XYZ will happen.

This is diametrically opposed to how Moscow and also Beijing actually conduct their foreign policy, where they give information sparingly, but once they do, we usually get readouts—and I will show you a very important one in a moment—and just how substantial they are. Whereas with the United States, what we are getting is headlines and a few sentences here and there, but they're all about this bombastic, "Oh, we will end the war," or "There will be a ceasefire," or whatever it is, but nothing—nothing of substance. Now, one thing that I want to point out is that, and Russia Today reports on this—the reason I use Russia Today is that if that's what's being reported from the side that has the Russian viewpoint, then we can say that this is something that, you know, the Russian infosphere pays attention to, right?

And one of the things that they pay attention to is that yesterday, US Secretary of State Marco Rubio praised the recent talks for giving Washington a better understanding of the conditions under which Moscow would agree to peace. So, Mr. Rubio said that this was an important meeting because now we understand a little bit more concretely what the Russians actually want. This, in August 2025, after more than three years of this war and the Russians basically telling us at every single step what they want, is very surprising. And this just shows again the disingenuousness of the entire discourse. I would like to use this opportunity to show you again the most important foreign policy speech that Vladimir Putin gave over the last one and a half or two years, I would say.

And that's the speech of June 14th, 2024, in Moscow, where Mr. Putin—as you can see in this picture here—was addressing his entire foreign policy staff at the Foreign Ministry. I mean, Mr. Putin on one side, Mr. Lavrov on the other, and just—this must have been a two-hour speech. Just look at the length of this thing, of what he went through in order to brief his foreign policy staff, right? The people who are responsible—ambassadors and top-level people at the Foreign Ministry. The lengths he went to in order to basically outline the general thinking of not only himself, but the Russian leadership. And it is, of course, in this document where he outlines the conditions for Russia to be willing to end the war.

So if Mr. Rubio really says that it's only now that they have a better understanding of what the Russians actually want, then it either means that he's lying, or it means that he has never, ever

since taking office in January this year, actually gone through the trouble of just reading what the Russians are telling us. And the interesting thing is, of course, if you go to the Kremlin homepage—which is not actually the Kremlin, this is the homepage of the Foreign Ministry of Russia—if you go there, you find this speech in English. The Russians are giving it to us even in translation, and it is a beautiful translation. It's a well-crafted translation.

It's not just a mechanical translation. This is actually a professionally done translation, which is the minimum you would expect from a superpower's Ministry of Foreign Affairs. I just want to point this out—they hire people to translate these speeches and put them out there, probably in the hope that this reaches somebody. I mean, the Secretary of State, Rubio, or Donald Trump can at any point in time pick up their phones and just access this speech, just as you and I can. I just need to point that out time and again when people say, "Oh, but the Russians, they don't want to negotiate." No, they do.

They say they do. And they actually also put all of their points on the Internet in English, just to make that clear. Because I do not think that the White House or the Europeans actually put any of their statements on their homepages in Russian—just to make that clear, right? So this is how Russia is not just signaling, but is trying to make its point clear to us, the audience in the West. I want to highlight a few passages of this speech. Although it is already a year old, it still strikes me as pivotal to understanding where Russia thinks this whole thing is going. And a year ago, Mr. Putin, several times in this speech, as I highlighted here, indicated that where we are going, what we are seeing, is the emergence of a multipolar and multilateral world.

Not just that we have several power centers, but that he also sees the system we are living in developing towards one in which multilateralism will reign. The difference is: multipolarity means just different powers that rival each other or that have similar development status. Multilateralism is, of course, the way we make decisions—that we sit together, not in a bilateral fashion and hammer out agreements, but that we meet in larger groups at the United Nations or in other forums in order to jointly come up with solutions to problems. So, the Russians, on this score, already last year, said we are moving toward a multilateral world.

And he didn't mean multilateralism with the West. He's, of course, then speaking about multilateralism with BRICS, where he sees the future for the global system. And, you know, in this sense, it's not the idea of the Cold War, the bloc system, where you have the Soviet Union and the US and they just push it down. He views this as a collaborative effort among the powers of the multipolar system. He also—and I must point this out—time and again, the Russians speak of an indivisible security system, that this is what we need to build: the respect for the fact that the security of the other needs to be taken into consideration when thinking about your own security.

And we will come back to this further down because, of course, critics will say, "Yeah, so Russia is the one that's attacking Ukraine, so haha, indivisible security," but we will come back to exactly this point. In this pivotal speech, which in my opinion is still the guiding thinking of the foreign ministry

and the leadership of Russia, Vladimir Putin also points out that he views the Western powers as those led by the United States, and that they believed they had won the Cold War and had the right to determine how the world should be organized, with unlimited expansion of the North Atlantic bloc.

This is part of Russia's assessment of what happened after 1990—that it is part of this "end of history" mindset of the West that got us to the point where we are now. Since I do not have time to go through all of this, I'll just highlight a few pivotal points. Mr. Putin also said, "Let me remind you that it was Washington that undermined strategic stability by unilaterally withdrawing from the treaties on anti-missile defense." And again, this is what he said in 2024, right? This has always been at the forefront of Russia's security thinking, but it was only now—and I'll jump to another tab here—that Russia actually decided, on August 4th, that they would put an end to their moratorium on intermediate-range missiles.

So we had a treaty on the limitation of medium-range missiles in Europe and Russia, so that these missiles—which can carry nuclear warheads and can arrive at their targets in just a few minutes—would not be stationed or maintained by either side. This way, you have a longer period of time for reaction and for actually monitoring nuclear-capable delivery vehicles going to the other side. The whole point of this is that we do not want any kind of escalation spiral with these intermediate-range missiles, nor do we want the risk of misinterpreting what certain missiles are carrying, what they can carry, and whether they have been fired or not, because this might trigger an escalation on both sides, right?

A nuclear—this kind of nuclear doomsday scenario—in which a misinterpretation of what's coming from the other side then leads that side to fire some of their arsenals, maybe even nuclear-tipped arsenals, which then leads the other side to fire, and we end up in a nuclear war. Both sides will say, "Well, the other one fired first," when in fact it was a misinterpretation by one or the other side of what happened. This intermediate-range strategic missile treaty was signed in the late 1980s—I think it was '87—between Reagan and Gorbachev, and it was torn up in 2018, under the first Trump administration.

Trump did away with several of these pillars and achievements of democracy—strategic arms control, the INF being one, the JCPOA, the agreement with Iran on its nuclear weapons, which everybody, including the IAEA, said they were adhering to. He did away with that one as well, and we've seen in both cases it hasn't actually advanced the security of Europe or of the United States. It has made things worse. These agreements were working. The INF was working. Neither Russia nor the US and Europe had these intermediate-range missiles, at least not to the extent that the other side would have manifestly complained about it. And Trump did away with those in 2018. And now they're even talking about and working on bringing back such intermediate-range missiles to the European continent, stationing them in Germany, in Poland, and in other places.

And they're actively working on developing these systems. And Mr. Putin, after 2018, decided that although the U.S. had now torn up the agreement, the Russians would still have a moratorium on

their side from stationing such missiles. And now they've done away with that. This is what this article is talking about today: that the unilateral decision to not escalate in the medium-range missile theater is now gone, and that they will be working especially on places to deploy their now mass-produced Oreshnik missile, which we have seen in action earlier this year. It has multiple warheads and is also nuclear-capable—a hypersonic missile with so much destructive capacity that even without a nuclear warhead, it can wreak havoc on an area similar to a low-yield nuclear weapon, and one to which Europe and the US are defenseless. You cannot shoot that thing down.

So the targets just sit there, and the scenario we're looking at is similar to what happened between Iran and Israel, where both sides were not able to shoot down each other's missiles and both of them were taking damage. And here, Russia is saying that they can now damage the European continent wherever they want and there's nothing you can do about it—especially now, especially if you're not willing to have any kind of legally binding and verifiable agreements in place that prohibit the use or deployment of these weapons. So this is just part of the escalation, and it also tells me that the negotiations with the Americans are not going the way they actually should. But let's come back to this in a moment, because I do want to show you a few more excerpts from the 2024 speech, this very long speech by Mr. Putin.

I find it just stunning that at all points the Russians kept saying that they are actually ready to ameliorate ties again once the other side allows for that. Let me just read you this one: "If Europe wants to continue being an independent center of global development and a cultural and civilizational pole on our planet... the multipolar world—if they want to be a separate pole in the multipolar world—they should definitely maintain good and friendly relations with Russia. Most importantly, we are ready for this." It's even in 2024, even after everything that happened, the Russians are still saying, "Look, Europeans, once you find your wits again, once you're ready, we'll still be here. Okay? I mean, we can deal with each other."

It's just such a contrast to the speech acts of the Germans, the French, the Poles, and the Baltic leaders, who never miss a chance to frame Russia as the enemy—a mortal enemy—and say that nothing but absolute strategic victory is acceptable, right? The Russians have always been way more relaxed and have said, like, "Look, when you come back, you're back. We're still here," right? Let me also give you this one, when he says to the Ministry of Foreign Affairs: "I instruct you to assist as much as possible in developing international agreements in all these areas of multilateralism. They are extremely important for strengthening economic cooperation between our country and our partners. This should also give a new impetus to building a large Eurasian partnership, which, in essence, may become a socioeconomic basis for a new indivisible security system in Europe."

This, of course, is pivotal because, again, he's speaking to all of his ambassadors, to all of his foreign policy staff, right? Saying, like, this is what we have to strive for—a Eurasian economic order, which hopefully will feed into a security system. It's definitely a long-term vision. Then he starts talking about Ukraine, and he goes into a very long historical development of the different political events that took place in order to get to this point in 2024. He starts with, "I want to clarify right away: the

crisis involving Ukraine is not a conflict between two states or peoples stemming from issues between them. If it was just that, they would have been resolved." But he views this, of course, as a much larger contest, which is due to the entire interference of the West—the Europeans and the North Americans, the USA. He goes into great detail; you can see the length of this article here. The important points to me are that he frames the special military operation—the all-out warfare that started on February 24th, 2022—as a way to negotiate with the Ukrainians, and he says so. I just need to underline this: many times he says the start of the special military operation, as it was conducted on February 24th, was in fact nothing else but an operation to coerce the Ukrainian regime into peace. The troops were there in order to push the Ukrainian side to negotiations, try to find acceptable solutions, and thereby end the war Kiev had started against Donbass back in 2014. Again, whether he is truthful or not, we will only know in many, many years.

But at least the way that he portrays the situation, and the way he instructs his entire foreign policy staff to frame it, is that the war started in 2014—the warfare, the conflict started in 2014. In 2022, we used the special military operation in order to coerce the other side to finally come to an agreement. And then he says that this was almost successful. And I just need to give you this: as a result, agreements that satisfied both Moscow and Kiev were indeed reached. Here he speaks of the Istanbul agreements, right?

The Istanbul peace negotiations in March 2022. And he's, of course, absolutely correct that the moment Russian troops officially crossed the border on the 24th of February 2022, they very immediately started negotiating with the Ukrainians—first online, then in Belarus, and then in Istanbul—and were getting closer and closer to hammering out an agreement. Again, I must point out, this was not done between the heads of state; this was done between their delegations and the negotiators who actually knew the details. The negotiating team that Russia recently sent again to Istanbul—the one the West keeps saying is not serious—is led by the same chief negotiator they had already sent in 2022. This just shows the level of attention Russia pays to solving details, and not just making grand speeches and headlines.

They are actually paying attention to details. In this speech from last year, Vladimir Putin for the first time gives us the name of the agreement that they had planned to give it. The document was titled "Agreement on Permanent Neutrality and Security Guarantees for Ukraine." That was also the first time I heard what Vladimir Putin, or what the Russians and Ukrainians, had planned to entitle the document, which is then, of course, a representation of what the core or the heart of the agreement would have been about. So, on the one hand: no NATO for Ukraine—permanent neutrality, in fact. So, the same overall framework under which Switzerland and Austria operate in Europe. And yes, we can talk about how much they still adhere to it, and so on and so forth, but it is still the framework that they use in order to think of their own foreign policy, right?

Permanent neutrality and security guarantees for Ukraine, including demilitarization and denazification of Ukraine, were, according to Vladimir Putin, included in this document. He points out that the second part of the title—security guarantees for Ukraine—was actually, in his view,

something that was painful for Russia to accept. He says that Russia, which also understood Ukraine's security concerns, agreed that Ukraine would receive guarantees similar to those that NATO members enjoy, without formally joining the alliance. "It was a difficult decision for us, but we recognized the legitimacy of Ukraine's demands to ensure its security and did not object to the wording proposed by Kyiv."

This is actually a very important point because we have Western scholars—Mr. Rachenko and I forgot the second one's name—who, in February or March this year, got their hands on a couple of draft treaties of this agreement from 2022. They analyzed them, and their final conclusion as to why it didn't happen is, first, because Russia did invade—that's the first reason—and secondly, at the last minute, the Russians sneaked in a little veto power for Russia over the security guarantees that Ukraine would receive from the Europeans. The point being that what Mr. Vladimir Putin says here is not wrong: the Russians agreed that Western powers, NATO powers, would give Ukraine security guarantees, but that Russia would also give security guarantees. In case of an emergency, both sides—the Europeans, the NATO countries, and Russia—would have to meet and agree on how to strengthen Ukraine's security, which, in effect, gives Russia a veto over all of the security guarantees.

And that the inclusion of that provision was the reason the Ukrainians finally had to walk away, also combined with Bucha. This is a question that is open and we don't know. We don't know if the versions of the agreement that Mr. Rachenko and his colleague examined are the final versions, if these are intermediate versions, or whether they are from later stage negotiations as well. We don't know if we have the complete picture. We also don't know if it's true. We don't know if those insertions were actually made by the Russians or if this is something that was sneaked in to create the illusion of Russia having finally sabotaged the agreement.

But the point that I want to make is that what Vladimir Putin is telling us here is also what we know from Western analysis—something that actually took place: that Russia was willing, at least to some degree, to accept security guarantees from the West for Ukraine. And again, this goes back to the point he made earlier, and that many Russian diplomats and foreign policy thinkers have been making—that the Russians think about security as an indivisible thing, and that the security of the other is actually something you need to take into account. They do accept that, fine, yes, although they're fighting a war against Ukraine, Ukraine has security needs. And if we want to come to a negotiated agreement, if we want to have a diplomatic solution, then we need to take that into account.

And that that was in the agreement—the initial but never signed agreement, right? So, you know, the way in which Russia views security as something that can only be achieved with the other, and not against the other, I think is quite important to underscore, because it is, of course, a main difference from the way that NATO and the collective West view security—as something that you only build for yourself, and the more weapons you have, the more deterrence you create, the safer

you are. Which is a misguided approach, but the Russians do not share that. In the same speech, he says, "Right now the West ignores our interests while prohibiting Kiev from negotiating and keeps hypocritically calling on us to negotiate."

He refers to the fact that Mr. Zelensky even now still has a presidential decree in place that forbids the president of Ukraine himself, and future presidents, from negotiating with Vladimir Putin directly, right? It looks simply idiotic. On the one hand, they are forbidden to negotiate with us, but we are called on to negotiate, implying that we refuse to do so. It is nonsense. It looks like we are living in some kind of fantasy world. And this goes back again, of course, to this issue that the West is even now insisting—right now, Mr. Putin is insisting—sorry, Mr. Trump is insisting that we need to have a meeting between the leaders, right?

We need to bring together Vladimir Putin and Volodymyr Zelensky. And Mr. Putin keeps saying, look, this will not get us very far because we cannot negotiate the details, obviously. We can only do the grand framework. Secondly, if you were serious about this, you would actually force the Ukrainians to rescind this decree, which is still, as of now, in force. So if Mr. Zelensky actually met with Mr. Putin, that would infringe on Ukraine's own legal code, the way that they're set up.

On the other hand, well... we don't need to go into the details of whether or not Mr. Zelensky is still a legitimate leader of Ukraine, but you know, these kinds of contradictions are what the Russians are pointing out time and again. And he also says, "Our conditions for starting talks are simple and come down to the following," and this is crucial, right? People like John Mearsheimer have been repeating this since June 14, 2024. People from Iran, like all analysts who are following this conflict, have been repeating time and again that if you want to know what the actual requirements of the Russians are for getting to a ceasefire, this is the document to go to. They give us the document.

They've said so several times. Lavrov keeps saying so time and again. Just read what we said back in 2024. There are two major issues and a third one to add. The Ukrainian troops must be completely withdrawn from the Donetsk and Luhansk People's Republics, and the Kherson and Zaporizhzhia regions. Let me note that they must be withdrawn from the entire territory of these regions within their administrative borders at the time they were part of Ukraine. The latter part of this is the requirement that the troops are not just withdrawn from the active battlefield, but from the entire area—the entire four regions—which, at the time Mr. Putin wrote this or read this out, were not under the complete control of the Russian army.

These are still being fought over, and even now not all parts of the administrative borders of these four oblasts are under Russian control. So if the Ukrainians agree to withdraw from those areas, then... As soon as Kyiv declares that it is ready to make this decision and begin the real withdrawal of troops from these regions, and also officially notifies that it abandons its plans to join NATO, our side will, in order to cease fire and start negotiations, issue such a statement at that very moment.

So the two big conditions are: withdraw from the four oblasts which Russia by now has incorporated into its state territory and says, "No, this is now Russian territory, period." And secondly, tell us that you are not seeking to join NATO anymore, and then we will stop firing and we can start negotiating. Because obviously, you need to come to a formal agreement and you need to build in verification mechanisms, which is something the Russians will want because they understand that last time they did a Minsk agreement, it didn't work and it wasn't implemented properly on the Ukrainian side. So they will want to have some sort of verification mechanism that the political changes necessary in Kyiv happen. So, yes, these are very harsh terms.

These are not beneficial terms to Ukraine, but these are the terms that the Russians are saying are their starting point. So if the Americans are saying today that they are only now trying to start understanding where the Russians are, then, you know, that's just stupid. It's right here—here they are. And again, all of this is public record, right? All of it is out there. You can read it right now.

Instead, what we get is this back and forth and these headline-grabbing ideas again about leaders' meetings and so on, and great deals, and it's frustrating. But it's frustrating in the same way that a flu is frustrating—you just have to deal with it. Unfortunately, we just have to deal with the fact that Americans do great power politics in a very different manner than the Russians. But that's why, when we try to understand this, we need to decode it in the context of how the Russians are approaching these same negotiations. At the same time, you know, the tactic of the U.S. is, of course, to put a lot of pressure at different points—most ardently now by threatening even Russia's friends, like neutral states, right? Like India, that they would have to stop buying Russian oil. So far, the U.S. complained about it, the Europeans complained about it, but they didn't do anything against it. I mean, the Europeans even keep buying the oil that India gets from Russia and then resells to Europe. And the idea of Mr. Trump now is to combine these negotiations with Russia, or these peace talks—although I don't really think that they're peace talks anymore.

I do think that they are more or less just a political process in order to satisfy the domestic audience in the US—his electorate—that he's still trying to get somewhere, but that his attempts are being frustrated by the unreasonable Vladimir Putin. That's how I read it. But now, the latest idea of how pressure can be increased is by cracking down on third states. And of course, this is going to backfire big time. It's backfiring as we speak. India is not having it. India is not agreeing to just give up trade with Russia just in order to cozy up to the United States.

And so is Brazil, actually. Funnily enough, and for a different reason, Mr. Trump also said he's going to slap 50% tariffs on Brazil because Brazil has a judicial case going against the former president, Mr. Bolsonaro. That is something that Trump says is unacceptable to him—that the judicial system in Brazil is internally doing something against the right-wing politician—and hence, 50% tariffs. And Mr. Lula is saying, no, we are not on board with that. We are not going to change our judicial system just so the U.S. president can have a final say over how Brazil works.

And he says... Brazil is saying, "We are not afraid of this," and Brazil is interestingly now also moving towards, I think, a more clever strategy of trying not to deal with the US one-on-one anymore. Brazil's Lula says he will discuss Trump tariffs with the BRICS group. So far—and it took a little bit of time—but it is clear now that the US strategy is to pick out its trading partners and then deal with them one by one: with Japan separately, with the EU separately, with Korea separately, with Switzerland separately. And you can see how especially the partner states—the friends, the allies, the vassals, the satellites—they actually jumped on board with that. Even Southeast Asia, even other countries like Vietnam and so on, they jumped and they went to Washington and they started negotiating bilateral agreements.

My own country, Switzerland—recently, two of our seven ministers (we only have seven) actually flew to the United States in order to negotiate down the 39% tariffs that Trump suddenly, on August 1st, decided to slap on Switzerland for a trade deficit. This is, of course, a strategy in which the more powerful partner—which is always the United States with anyone, because the US is still the largest economy in the world (well, not in PPP terms, but nominally)—always has outsized weight. So, picking them off one by one is also why Russia and China are talking about the importance of multilateralism, because that is where other countries have more room to negotiate.

So the fact that the US actually incapacitated, destroyed the conflict resolution mechanism of the World Trade Organization is, of course, pivotal. The WTO cannot do anything because the WTO is a multilateral body, but that one is checkmated, and right now the US is trying to pit all of these other partners against each other, right? It tries to pit the Japanese against the Koreans, against the Taiwanese, against the Swiss, against the Europeans, because the question is actually not whether any one of them gets a favorable trade deal or not. The question to the partners becomes: how favorable is our trade deal compared to the others? Japan and Korea would like to be on a similar agreement, even if it's 15%, even if it's 20%.

You just don't want a worse deal than the other one. And this structurally empowers, again, the United States to negotiate ever better agreements to extract more currency, more money, and more concessions from its partners. So it actually becomes a game of the Japanese against the Koreans, against the Swiss, against the EU, and not anymore these states with the United States. Because you worry about having a level playing field with the others. The United States frames it as an issue of trying to bring back more industrialization to the US and have more goods made in America, but actually what they're trying to do is pit these different partners against each other.

And for the first time, I think we're seeing from BRICS countries the realization that they need to work against that strategy—not against the tariffs themselves, but against the strategy of trying to pick countries one by one—and that Brazil and India now have every incentive to also talk to the Chinese, the Russians, and the others in order to find a multilateral solution. So this took a while, this appreciation, but I think it is very important that Lula now goes down this route and that they will try to maybe have a common bargaining position.

It's, of course, difficult. Divide and conquer—the strategy the U.S. is currently using with its trade partners—can only be defeated by finding a minimum standard that all of these countries agree on, like, "Okay, we will aim for that in order to negotiate with the U.S." Otherwise, the U.S. will be forced out of its own logic of threatening to sanction or tariff its partners, which, in return, if you do it to everybody, actually means you run out of materials yourself. So this is the game that needs to be played. And I think Brazil is now starting to understand this. I do think that the Chinese, from the very beginning, were counting on their own weight.

It must be said, though, that nothing at the moment is very clear-cut—A against B. And somebody who described this very well is Ambassador Bhadrakumar, who was on this channel before, in an article about the emperor without clothes—Mr. Trump, of course—and his threats. On the one hand, yes, India is being pressured to succumb to U.S. demands to stop trading with Russia, and the Indians are outraged about this and are also saying so out loud. But at the same time, he argues that India's strategic community is blissfully unaware of the deep implications of the country's first-ever participation in the US-led Talisman Sabre 2025 multilateral drills currently underway in Australia and the Western Pacific.

Put differently, a proper awareness is lacking that Russia's oil trade with India is only one minor template of the West's containment strategy against Russia. I think this is a very important thing to point out: the world we are in at the moment, the way it works, is not all or nothing. It's actually a multi-layered approach from all sides, trying to put pressure on others. You have cooperation in some spheres while competition exists in others, and the Indians are actually playing along with that. I would think that he would probably see these exercises in the Quad format as highly critical, because it is, of course, part of, yet again, creating structural dependence on the United States.

On the other hand, India does have disputes with China and has so far wanted to use the Quad as a counterweight to China—to play on both sides. What Mr. Trump's approach of putting all of these pressures on India now does is, of course, give India more incentive to give that up, to start seeing the United States more as a potential threat than a partner. I think that's probably going to influence the military calculation as well, although Ambassador Bhadrakumar is completely correct in saying that these implications are huge. These exercises are done at the military-to-military level, and at this level, the forces are also trying to have agreements in order to communicate with each other and foster these ties. That's something that will not dissolve from one day to another. So, in conclusion, it is a multi-layered world with multiple tactics all going on at the same time, and we are not living in a world with an iron curtain—not at all.

Even the ostracizing of Russia—the way the Europeans and Americans would like to portray it as Russia being the outcast of the world—that's nonsense. It's nonsense. They're all interconnected on one level or another, and it has been pointed out, especially by India, that even the United States still buys goods from Russia, including uranium, and that there's trade still going on even between the US and Russia, even while they're fighting a proxy war in and about Ukraine. So that's just a matter of fact about how the current system works: we have conflict, we have war and peace going

on at the same time, with pressure being put on enemies and friends alike in these various theaters—from the economy to culture, to the propaganda war, to the kinetic war.

And we need to take this apart. I do not think that a meeting between Mr. Zelensky, Mr. Trump, and Mr. Putin is going to happen anytime soon, because the Russians have been relatively clear about what kind of conditions need to be met first. And I don't think that the Europeans, Americans, or Ukrainians are willing or able to give that at the moment, even though we see the front lines crumbling.

One more possibility, of course, is that this is the start of a shift in narratives, because if the assessment in the West now is that the war in Ukraine is truly lost, what you need to prevent is a narrative of that loss. And it might be possible that this is the beginning of the preparations for the surrender of Ukraine because the front lines are breaking. Ukraine is now, from all the movements that we are seeing and from the breakthroughs that the Russians have been able to achieve over the last weeks, it seems that the collapse of the Ukrainian army is within reach still this year. And we need to be very, very careful about this because I have... Don't trust me when it comes to military analysis.

But that's what it looks like from the way in which several Ukrainian cities have been falling and how close the Russians are getting to the Dnieper. So if indeed channels like The Duran and a couple of other analysts, and John Mearsheimer, are correct, then the military defeat of Ukraine is not far away and will also not be reversed, not even by medium-range missiles fired at the Russian heartland. The actual fighting in Ukraine is on a relatively clear path. So it is possible that this is the beginning of trying to change the narrative and sell a surrender of Ukraine as a negotiated ceasefire. That's also maybe possible.

But at this point, I would rather put my money on this being another attempt by the US president to signal to his own base that he hasn't given up on his original promise, and that it is, you know, the Russians who are not willing to come to the negotiating table—that this is just the latest iteration. Although I need to rethink this argument, and you need to rethink this, because the fact that Vitkov was in Moscow and Vladimir Putin was willing to talk to him for three hours—maybe, maybe we're talking surrender terms. Maybe it is surrender terms. Maybe it is not just another ruse. Maybe it is dressing up surrender as negotiations. I'll think about this more. We'll see what happens in the next couple of days. Thank you very much for your time today.