McFaul: You're listening to World Class from the Freeman Spogli Institute for International Studies at Stanford University. We bring you in depth expertise on international affairs from Stanford's campus straight to you. I'm your host, Michael McFaul, the director of the Freeman Spogli Institute.

Today we have a special episode. We're here with Frank Fukuyama, the Olivier Nomellini Senior Fellow at the Freeman Spogli Institute for International Studies and many, many other titles which we're not going to go through.

We're going to talk about your trip to Ukraine. And my trip to Ukraine, as we were both there together.

Fukuyama: Both of us, yes.

McFaul: Let's start with you, Frank. You've been following Ukraine. You've been working on Ukraine. You have lots of alums of your various training programs in Ukraine. The name ‘Fukuyama’ is a really great one to mention in Ukraine. “I work with Frank Fukuyama;” that's another good phrase to bring up.

Fukuyama: As is the name “McFaul.”

McFaul: Yeah, we should go on the road! Fukuyama-McFaul.

But I think this was your first time there since the war, right?

Fukuyama: That's right.

McFaul: Like myself. So, tell us first, what was consistent with what you had been thinking before? And what was surprising or different?

Fukuyama: I suppose what was surprising was how normal Kyiv looked; people are going to restaurants and nightclubs and driving around. Apart from the burned, Russian tanks on display and soldiers everywhere, you wouldn't necessarily know that it's a nation at war.
So in that sense, I think they're deliberately trying to cultivate a sense of normalcy.

What was your impression?

**McFaul:** Definitely the same for the city. Strikingly so. And as you know, it's a beautiful city. It's a great place to be. For my first dinner there that I went to — not a fancy place — but a new boutique-ey Ukrainian restaurant, and it seemed very normal. I completely agree with that.

In addition — not different — in my conversations where I had more personal time to talk with people, I was stuck by the prevalence of the loss of life, of the tragedy, and the stories of different people, including one of our alums, Andriy Shevchenko, who was who was a summer fellow here at CDDRL, the Center on Democracy, Development and the Rule of Law. Frank, you used to run that center; Kathryn Stoner now runs it.

I can't remember, Frank; was he here when you were running it?

**Fukuyama:** Yes.

**McFaul:** Yeah, so you know him well. He told me the story of how his brother was killed, and that makes it much more personal than just reading the numbers. So that was something I felt more palpably being there than before.

**Fukuyama:** Now, you had some great meetings; you met with Zelenskyy and you met with your sanctions committee. How did you gauge the mood of Zelenskyy and people at that level like Andriy Yermak, his chief of staff?

**McFaul:** Yeah. I met with Yermak, and I even did a public talk with him at one of the universities. I met the foreign minister and I met the defense minister, and many other folks, many of I've known for a long time.

I was struck by two things with the government meetings and meetings with some of our parliamentary friends, the people MPs. First was their conviction and their sense of purpose. They see victory as meaning liberating their territory, and there's no there's no gray area, at least as they were talking to me.

I also met people doing really inspirational things. I met the deputy minister in charge of European integration, for instance. I kind of knew her before we met, but this was the first in-depth conversation we’d had.

**Fukuyama:** She’s very impressive.
**McFaul:** Yeah! And she was at the conference as well. And she’s fully on the notion of full steam ahead with European integration. They're not waiting.

You may remember at the YES! Conference that we were at, somebody from the floor — a European government official — said, “After the war is over, you will begin reforms.” And this deputy minister said, “No. We’re reforming now. We're not stopping.” That was impressive to me.

And same with people I met in civil society and parliament. They're critical, but they're also committed to a common struggle. I didn’t sense defeatism at all.

What was your impression on that part as well?

**Fukuyama:** Well, we can get to that because I'm a little bit worried about the situation on the ground. Certainly nobody expressed any defeatism, but there are reasons for concern.

I’m curious about your sanctions meeting because you’ve been running this sanctions group.

**McFaul:** Right, I didn’t talk about that.

**Fukuyama:** You met with Zelenskyy on that specifically. As I saw from the discussion, he made a special appeal. They're expecting that the Russians are storing up missiles and are going to attack the electrical grid over the winter when it gets cold. And he's very worried about that.

**McFaul:** He was, and I'm glad you brought that up.

I would say that’s when he got most passionate in my conversation with him. Sanctions are one of the many fronts of trying to defeat the Russians, and that the goal of sanctions is to speed the end of the war as fast as possible.

I want to be clear: the world has done some important things on sanctions. We can go through that list. And I think our working group has helped to push the imagination. They've done some things today that people say were impossible a year and a half ago.

But you got to keep pushing. And Zelenskyy’s frustration came from a sense that there’s a kind of malaise and a notion that not more can be done. And Zelenskyy knows that more can be done, and that there are loopholes in the sanctions regime, particularly about technologies.

This working group published a couple of papers documenting those loopholes and we have some fantastic data that our Ukrainian colleagues found. And it’s very clear that places like
Hong Kong and Kazakhstan and Belarus and Georgia are being used as intermediaries to bring Western technology into Russia that then helps them build rockets to kill Ukrainians.

And Zelenskyy’s argument to me was, “Look you’re allowing thousands of dollars to be made by these companies in Europe, but mostly the United States. Then you spend hundreds of thousands of dollars with your Patriot missiles to shoot down the rockets that they’re building with the technologies your companies supplied. This is illogical.” And I think he’s right. It is hard to control technology — you know that better than I — but that was the place in our conversation that I heard the most frustration in his voice.

**Fukuyama:** It’s actually that economic trade-off on the defense systems that really started me thinking and really worrying about the situation. A Patriot missile costs many times as much as the missiles that they’re shooting down.

**McFaul:** Exactly.

**Fukuyama:** And it’s not a sustainable situation. My assumption at the beginning of the counter offensive had been that if Ukraine can really threaten Crimea, then you might get Putin in a position where he’s so worried about losing it that he might be willing to talk about some kind of ceasefire.

**McFaul:** Right.

**Fukuyama:** And that would then take some of the pressure off Kyiv. I think the Ukrainians are doing what they can to take the war to Crimea. As I understand it, a lot of the Black Sea fleet has now left Sevastopol.

**McFaul:** Yes. It’s quite striking.

**Fukuyama:** And they’ve gone off to other ports because the Ukrainians have been quite successful at striking them. But the thing that has really started to worry me is, what if the Russians — even if they lose Crimea — don’t stop? What if they keep shooting missiles?

It becomes a losing proposition to think that the West can continue to supply all these expensive air defense systems. We’re already in a situation where Republicans seem to be increasingly in full revolt against.

**McFaul:** Yeah.

**Fukuyama:** And that’s when it struck me that the Ukrainians have kind of realized that unless they can take the war to Russia itself, this isn’t going to end. The sanctions are fine if you can put pressure on them, but that’s not going to stop them from what they’re doing right now.
So Ukraine is actually beginning to attack targets in Russia. I'm sure we're freaking out about this, but I wonder whether it's not going to come to that at some point.

**McFaul:** I think you're right, Frank. I'm not a military expert, but I listen to them often, as you do too, and as we did in Kyiv. It doesn't seem sustainable to use very expensive interceptors to take out very cheap drones.

The good news on that is that there is innovation going on inside Ukraine, because they understand this, too. The Black Sea fleet attacks have had these pretty incredible results, that without a navy they've gotten the Russian Navy to leave. But they've got a long way to go. It felt to me in talking to people that this hasn't scaled yet.

And so, I do think you're onto something that they have to change the dynamics of the war. I think you were arguing for attacking Crimea a long time ago, if I'm not mistaken.

**Fukuyama:** Yeah.

**McFaul:** So, they are doing that now. But what happens inside Russia? Obviously, there are more attacks than they were before. It makes people nervous in the West, and I suspect in the Biden administration — actually, I don't suspect; I know. But what choice do they have? They've got to do something.

**Fukuyama:** Yeah. I think that's a choice that we're going to be facing, whether to support that sort of thing.

What was your sense of Ukraine’s prospects for NATO? There were a lot of Europeans and other Americans at this conference. There's going to be a NATO summit coming up in Washington next year. How do you think things stand in that front?

**McFaul:** Well, what I want and what I predict are probably two different things.

What I think should happen is at the Washington summit, NATO should invite Ukraine to join and issue a formal invitation.

Remember, despite all the propaganda that Putin and his supporters have said, NATO expansion has been stuck since 2008. I was in the government for five years after 2008. I can tell you definitively that there was no push from the U.S. or any other European country for Georgia or Ukraine to join. It was stuck. Putin achieved his goals by invading Georgia; he stopped that momentum. We need to say that honestly and stop pretending that we have been working on this issue. And the Biden administration hasn't moved much either. So, it's been a long time. And they only got incrementally better at the last summit. I think they need to do that in Washington.
But there is a difference between issuing an invitation and membership. And that process typically takes two years. With Ukraine, it could take longer. I think that’s fine. I just think you need the signal that it’s not a question of “if” but “when.” And Putin needs to know that. Putin needs to know that this is not something he’s going to be able to stop.

So that’s my position. My prediction is that things are going to be the same as it ever was, and we’re just going to see more incrementalism. My sense is that it has to do with our domestic politics. If Biden were to announce that, and if Mr. Trump is the candidate in the summertime, he would then say, “You see? I’m the one that kept us out of wars. Joe Biden is the one to drag us in.” So, tragically, I think our domestic politics will get in the way.

**Fukuyama:** Well, it’s not just our domestic politics. I’m in the position of a lot of the European NATO allies feel that, “Yes, we want Ukraine in, but only when the war is over.” And that’s basically an invitation to Putin to keep the war going. And he can do that just by lobbing more and more missiles into Ukraine.

**McFaul:** Literally for forever.

**Fukuyama:** And the war will never end, and therefore, the invitation will never come. And that gives them an out. And that’s another reason why I think this missile issue is really important. What is it going to take to get the Russians to stop that?

**McFaul:** Tell me what you thought, in general, about what you were hearing from the Europeans versus the Americans versus Ukrainians at this conference we were at. I know that’s a big question. But like you say, there were lots of interesting people from all over Europe. Any takeaways from that? How are the debates different?

**Fukuyama:** I’m not as worried about Europe as I was previously. And that’s mostly because of France. Earlier in the summer, Macron really realized that trying to reach out to Putin was just a hopeless task.

**McFaul:** Right.

**Fukuyama:** He’d kind of flipped on that now. He’s been one of the people pushing to include Ukraine in the broader European landscape. In fact, he’s now taken a little bit more forward position than the Biden administration. So that’s encouraging.

This is not something that came up necessarily at the conference, but there’s a big problem now in Eastern Europe because of the farmers and the grain situation. Right a lot of Polish and Romanian farmers have seen their prices drop because of all the Ukrainian grain. This is directly due to the Russians targeting their ability to export this stuff.
The Polish elections are coming up. The farmers are really mad. And Poland — which has been one of the biggest supporters of Ukraine — is now saying some pretty nasty things about Ukraine because of this issue. And so, there's a lot of complicated politics here that unfortunately is going to weaken the very solid front that existed in NATO previously.

McFaul: Right. And the tragedy, of course, is that because Ukraine is efficient in its agricultural production, which is what we all want, they're being punished because of the inefficient farming industry in these countries. I had not been following that debate as closely as I should, and I did not appreciate that all politics are local, and it most certainly is there.

Can I ask you one other question back to the war? Tell me about counter offensives. Everyone has been talking about “the” counter offensive. But one of my takeaways is that the Ukrainians are planning for many counter offensives. Is that viable given the politics we were just talking about, and with a better arms and air support, could we see a different outcome in a counter offensive next year or the year after?

Fukuyama: Well, I hope it won't be delayed until next year or the year after. I think that the Ukrainians have done as best they could, given the fact that they weren't given F-16s and weren’t given ATACMs.

We had this very dispiriting and stupid set of criticisms of them over the summer saying that they weren’t using NATO doctrine and they weren’t concentrating their forces. But NATO has never operated without air superiority. That's their doctrine.

McFaul: That's a good point.

Fukuyama: And we didn’t allow them to get air superiority, so they had to revert to whatever they could do, which was using artillery and infantry.

General Budanov, the intelligence chief, spoke at the conference. And it was interesting because people said, “Well, you’re going to slow down once it starts raining and it gets cold.” And he said, “No.”

And I think that is because they’ve actually discovered that all this heavy armor on the Leopard tanks and the M1 Abrams is actually not that useful, because the technology has changed with the use of these small drones.

McFaul: Interesting.

Fukuyama: You can see everything on the modern battlefield. And you can destroy anything.

McFaul: Like big targets like that.
**Fukuyama**: And so as a result, you know, what they have to do is they send sappers out.

**McFaul**: What are sappers?

**Fukuyama**: They're infantry that clear mines by hand.

**McFaul**: Okay.

**Fukuyama**: It's very dangerous work. In fact, the son-in-law of one of our CIPE friends was actually training as a sapper at that moment.

**McFaul**: That does sound really dangerous.

**Fukuyama**: But it does mean that the counter offensive does not have to stop just because the tanks will get bogged down in the mud because . . .

**McFaul**: . . . they're actually not using them.

**Fukuyama**: They're not using them.

**McFaul**: Interesting. I didn't know that.

**Fukuyama**: They're using artillery and infantry, so the fighting could actually go on at a fairly high level all winter. We'll have to see, I do think that there's still a possibility that if they can get past the second and third lines, then you know, the whole position of the Russians may start to collapse. But they're not there yet.

**McFaul**: They're not there yet.

**Fukuyama**: It's a very tricky and worrisome situation right. And they're running against this American clock of our election.

**McFaul**: Well, let's come back to that. Like, tell us how you read the American clock. Both the drama that we're witnessing with the House, and in the longer term.

**Fukuyama**: I would say that in the short run, because there actually is a bipartisan majority of members of Congress that want to support Ukraine, they're going to figure out — post-McCarthy’s leaving the speakership — how to get another aid bill in. But I do think that once you get into next year and the election campaign, it's going to be hard to increase that level of support.
McFaul: Because Trump will be out there talking?

Fukuyama: Every other Republican now has kind of taken this position up except for Nikki Haley, and a couple of people that are never going to be the candidate. So I do think that there is an American time clock, unfortunately, that’s ticking.

McFaul: That’s hard to hear. Tell us a little bit about some of the people you saw that have been fellows at Stanford and in your CIPE program. What was the mood of those kind of people?

Fukuyama: I think they’re tired. There are a lot of issues that I discussed with several of them. For example, the election: should there be an election in Ukraine? Almost everybody thinks it’s a bad idea.

McFaul: Yeah, I heard the same.

Fukuyama: There are 8 million Ukrainians out of the country. There’s a million of them in the armed forces. Registering all of those people and getting them to vote is going to be an insuperable problem. It’s going to be a huge distraction in the middle of an existential fight for survival.

But in general, I think that so many people have lost relatives and friends or have people at the front that are actively fighting, and they just are really angry. And they’re really not in any kind of mood to compromise.

McFaul: Yeah.

Fukuyama: I didn’t see as any kind of war weariness saying, “Maybe we really need to think about stopping.”

McFaul: Yeah. Frank, I guess that was probably my biggest takeaway, which I can’t feel in Zoom calls and email, which is people are tired. People are worn out and working hard. Some of the domestic politics about debating whether the president’s office is too strong and all that kind of thing was greater than I anticipated, but the main takeaway I got was exactly what you said:

After you’ve lost so much, you want to just keep fighting. You don’t want to negotiate with these people. And I’m using the word “people,” meaning Russians. That’s a very diplomatic word; that was not a word the Ukrainians used very often. And I think that is hard for outsiders to understand. We’re thinking about it in the abstract.
There are so many people in America talking about how “We just need peace. They just need peace.” And there's two things that they don't get about that. 1) After you've lost your loved ones and you've lost so much, the idea of negotiating with Russia makes them angry.

The other part, of course, is they completely leave out of the equation that it takes two to tango. Putin doesn't want to talk. I listen to Putin so you don't have to, and everybody else doesn't have to. I've been listening to him for a long time, many decades now, and the people around him think that time is on their side. And especially before our presidential election, there's just no opportunity to have a peace accord or a ceasefire. And I wish more Americans understood that.

**Fukuyama:** I actually think that the 2024 presidential election in the U.S. is going to be one of the most important elections in our history. World history could go in very, very different directions depending on the way that that one goes.

**McFaul:** Well, on that profound note, we're going to do two things. First, thanks for being here today, Frank. And let's talk about that topic the next time we have you on World Class.

**Fukuyama:** Okay!

**McFaul:** And let's keep talking about Ukraine, of course, because these things are interrelated. Thanks for being here!

**Fukuyama:** Okay. Thank you, Mike.

**McFaul:** You've been listening to World Class from the Freeman Spogli Institute for International Studies at Stanford University. If you like what you're hearing, please leave us a review and be sure to subscribe on Apple, Spotify, or wherever you get your podcasts to stay up to date on what's happening in the world, and why.