U.S. Midterms, the Hybrid Kill Chain and the Bargain over Europe's Security Order

On November 10, one week after American voters handed both chambers of Congress to the Democrats, Russian negotiators in Abu Dhabi circulated an unsigned paper that restates and extends the ultimatum Moscow issued in December 2021: NATO assets back to their 1997 positions, no further enlargement, an end to Western arms for Ukraine, Ukraine's exclusion from the EU's common defense policy, and a pledge by France and Britain not to use their nuclear weapons in defense of other European states. Delegations from France, Germany, the United Kingdom, the EU, and NATO were in Abu Dhabi and outside the room.

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Five days earlier, President Donald Trump's envoy Jared Kushner announced that the peace process would now extend to a "broader European security architecture", the conversation Russia has demanded for three decades and that the United States is now convening. As we argued before, Washington treats the war as a territorial dispute and commercial opportunity, while Moscow seeks a sphere-of-influence order, which is why pressing Kyiv toward capitulation raises risks to Europe-wide security. The midterms have raised a new question: can a Democratic Congress pull American policy back toward honest mediation, or even back to the victim's side? Congress can indeed raise the price of the current presidential course, but the president will lead negotiations for two more years, and Congress's real leverage over the President in foreign policy is limited.



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Why There Is a War and Who Can End It

The war rages for one reason only: Russia invaded Ukraine in pursuit of aims that have never changed. As this journal argued in February 2024, the war can end only when the West and Ukraine defeat Russia's aggression, because talks on Moscow's terms merely freeze the fighting, "rewarding" aggression and setting conditions for further expansion. Russia could have stopped its war of aggression at no objective cost to its national security at any moment. Ukraine could stop the war only by accepting Moscow's terms, which means ending the war by ceasing to exist as a sovereign state.

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Adequate pressure therefore must fall on Moscow, yet since the White House meeting of February 2025, American policy has prioritized a quick ceasefire over support for Ukraine, raising the question of whether a truce without firm guarantees would only give Russia time to regroup. Furthermore, for the past two months, the pressure has flowed entirely toward Kyiv. Speed limits imposed on Ukraine's Starshield terminals overnight on October 13–14 still disrupt its interceptor drones, and on November 16 the American president said he had not heard of them while describing Putin as "backing down a little bit." Kyiv has meanwhile moved as far as a state at war can move: it now accepts a freeze along the current line of contact and refuses only to hand over land that Russia has failed to take. After receiving the American envoys in Moscow on November 12, Putin repeated his territorial demands and ruled out foreign peacekeepers. The party that can stop the war has been given no reason to, while the party that cannot is asked for more.

Almost There: Primakov's Doctrine at the Threshold

Russia wants what it has wanted since the 1990s. As the April 2025 edition set out in detail, its multipolarity is a return to spheres of influence in which power overrides law and sovereignty, built on the three goals of the Primakov doctrine: ending American primacy, restoring control over the former Soviet space, and stopping NATO, with the December 2021 ultimatums as their culmination. Measured against those goals, November 2026 is the closest Moscow has come.

On the first, the United States now treats European security as a file to settle with Russia and has gone to Shenzhen for a first trilateral summit with Vladimir Putin and Xi Jinping on November 19, on the margins of the APEC summit, a meeting Beijing describes as devoted to strategic stability among major powers. On the second, the Russian paper in Abu Dhabi demands an end to any NATO activity in Ukraine, Eastern Europe, the South Caucasus, and Central Asia. On the third, Ukraine's exclusion from NATO has become the American starting point, and Washington has asked Russia to accept the substitute guarantees it proposes for Kyiv. Secretary of State Marco Rubio has said that any guarantee must be something Russia agrees to. Asking the aggressor to approve the victim's protection concedes in practice the veto that the December 2021 drafts were written to obtain.

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Moscow has won the agenda, but has yet to win the outcome. The evidence shows a procedural victory: the format, sequence, and vocabulary of the talks now closely resemble Russian. It does not show a substantive one yet. Ukraine has not capitulated. The EU's foreign policy chief has said Europe will not implement a security deal negotiated without it, and Zelenskyy has warned against a "Yalta 2.0." Russia stands at the threshold: it has obtained Washington's recognition that Europe's order is negotiable, and now needs either Ukraine's surrender or Europe's consent to make that recognition a fact.

Who Is Afraid of NATO and Why?

Moscow presents its demands as a response to a threat from NATO, and the past five years have tested that claim to destruction. If the Alliance had any intention of attacking Russia, no moment could be better than the present, with the Russian army committed in Ukraine for a fifth year and unable to achieve its goals there. The record points the other way. As we wrote in March 2026, NATO membership has been the dividing line: the Baltic states were never invaded after joining, while Georgia, Ukraine, and Moldova, which stood outside, faced war, annexation, or occupation. Moscow wants NATO to leave because NATO's presence is the one barrier it has never dared to cross. The demand to return to 1997, taken from Article 4 of the December 2021 draft, would effectively strip allied forces from the sixteen members that joined after that date.

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The American answer is a list of five goals: permanent consultations, crisis communications, military transparency, mutual steps to lower the risk of escalation, and a lasting framework. Every item has existed before, in the NATO-Russia Council and the OSCE, and those arrangements ended because

Russia violated them. The proposal's premise, that Europe and Russia have spent thirty years failing to find a framework, turns the violator of an order into a party deprived of one. Europe's architecture is unfinished in a different sense: deterrence fails when allies hesitate, and Europe still lacks clear red lines and the preparedness to defeat a limited, deniable provocation against a member. Europe can fix this only by building up its own defense. A security deal with Moscow would do the opposite, pulling allied forces back from the states that need them most. Europe has made the Russian task easier by arguing over who speaks for it, as the Danish criticism of the Finnish and Norwegian call to Putin on October 27 showed, although Washington praised the call and Kyiv had been consulted, and Russian negotiators now cite the absence of a European proposal as grounds for doubting that there is anything to discuss with Europeans.

Before and After Abu Dhabi

The November 10 and 11 round was the first trilateral meeting since February, but the weeks before set its terms. The European delegations met the Americans before the sessions and stayed outside them. On November 5, Trump met with Putin's envoy, Kirill Dmitriev, and said a deal "might involve all of Europe"; the five goals were published the same day. The two days of talks ended with an agreement in principle on a large prisoner exchange and no movement on territory, guarantees, or a ceasefire. Abu Dhabi produced a prisoner exchange for Ukraine and an agenda for Russia.

> ***The talks stand where the war stands: Russia asks for what it could not take, and the mediator asks the defender what it is willing to give.***

Russia demands the rest of Donbas, Ukrainian neutrality, no foreign troops, and the 1997 line, and offers a prisoner exchange; the German daily Bild adds Finland's exit from NATO, a ban on NATO bases in the Baltic states, and the demilitarization of Odesa and Mykolaiv, though the Kremlin has denied the Finland demand. Ukraine accepts a freeze and rejects withdrawal and recognition. American negotiators have reportedly explored trading the rest of Donbas for guarantees modeled on NATO's, a concession Kyiv refuses. The United States wants a settlement quickly, proposes guarantees whose content nobody has defined, and treats Europe's order as part of the price. Europe insists on a ceasefire, then a peace agreement, and only then wider architecture, and expects a seat at the next round, which Moscow ruled out before Abu Dhabi. In an interview reported on November 16, former American envoy Keith Kellogg floated a freeze along the current line with a demilitarized zone, close to Kyiv's position, which Moscow rejects. The talks stand where the war stands: Russia asks for what it could not take, and the mediator asks the defender what it is willing to give.

The Kill Chain, Reset at a Higher Level

The framework that explains this sequence is Russia's hybrid kill chain, consisting of five steps: weaponize a vulnerability to create a crisis; open negotiations from a position of manufactured strength to impose new realities; escalate and threaten while negotiating; obtain concessions; then secure the gains and search for the next vulnerability.

In the Ukrainian cycle, Moscow created the crisis by massing troops on Ukraine's borders and then issued the ultimatums of December 2021, expecting easy concessions as in every earlier round; the invasion of 2022 was the escalation step, but it failed to deliver them. Ukrainian resilience and allied support denied Moscow the fourth step, and for nearly five years Russia has been stuck in the escalation phase of its own chain, raising the stakes without converting pressure into concessions. Each near miss since then, above all the American 28-point framework

of November 2025, has taught Putin that payment can still be extracted at the negotiating table.

The Ukrainian cycle thus remains stuck at escalation, and Putin has wrapped it inside a larger cycle whose target is Europe. Europe's vulnerability stems from incomplete defenses and dependence on an American administration that wants to leave, compounded by the European dispute over who speaks for the continent. Moscow turned that vulnerability into a crisis through 2026 with sabotage and drone incidents across Europe, a strike near the Polish border in September, and the Russian foreign ministry's naming, on September 30, of European arms factories as potential targets. The second step followed in Abu Dhabi. An army that cannot take the rest of Donbas arrived with a paper map of Europe, and the mediator helped manufacture the strength behind it, as the American president spoke of an agreement reaching beyond Ukraine, widening the negotiation agenda in Moscow's interests. The third step runs in parallel: on November 12, Putin restated every demand to the American envoys, while Russian strikes keep getting through air defenses weakened by the Starshield limits.

The new European cycle now stands closer to the fourth step, and has a clearer path to it, than the original Ukrainian chain ever did. Several payments have already been banked without any Russian move in return: the October 16 sanctions waiver, Ukraine's exclusion from NATO as the American baseline, a negotiating room without Europeans, and the recognition that Europe's order is open to negotiation. The principal payments — Ukrainian territory and the 1997 line — remain off the table. The size of the new demand also serves the old cycle: once NATO's own posture is on the table, the surrender of Donbas starts to look like the moderate compromise. This is also why Russia keeps escalating and keeps alive the threat of attacking a NATO member or even using nuclear weapons: Putin understands that he cannot reach his objectives any other way, so he needs ever more room to escalate.

Shenzhen and Berlin: Two Summits, One Hierarchy

The first trilateral meeting of the American, Chinese and Russian leaders produced no breakthrough, as some had expected. U.S. officials had described it as an opening for dialogue, and the joint declaration covered UN reform, fuel supplies and nuclear risks without mentioning the war in Ukraine. The protocol actually said more than the communiqué. Xi broke with decades of practice by greeting Trump personally at the airport, returning the gesture Trump made when he welcomed Xi at Joint Base Andrews in September, and the two stood side by side for the American anthem. Putin, who landed at the same airport earlier, was met by Xi's chief of staff. Before the trilateral, Trump held a formal bilateral of more than an hour with Xi. His conversation with Putin lasted 40 minutes, was unannounced, and a U.S. official called it informal. Moscow tried to look like an equal of Washington and Beijing by landing strategic nuclear bombers in Vietnam as Putin arrived. A state that has to point to its warheads to claim a seat among the great powers is showing that the seat is in doubt.

Berlin was also mostly about appearances. Leaders of the Coalition of the Willing met the same day and agreed to continue providing strong joint support to Ukraine next year, but the meeting produced no new commitments on security guarantees or deploying the multinational force. Its purpose was to establish Europe's place. German Chancellor Friedrich Merz said he was prepared for talks with Russia, provided European countries had a seat at the negotiating table alongside the U.S., Russia, and Ukraine, and British Prime Minister Andy Burnham said Europe has a clear, consistent, and united negotiating position. European leaders presented themselves as stakeholders no settlement of European security can bypass.

Putin went to Shenzhen for the photograph of a new Yalta and got one that ranked Russia third.

That ranking explains the logic of the new kill chain cycle. Throughout the year, Moscow escalated across Europe with an army that cannot take the rest of Donbas, and in the same year the talks moved from Ukrainian territory to NATO's withdrawal and the architecture of European security.

Whether Washington widened the agenda under Russian pressure or for its own reasons, Moscow drew the same lesson: escalation was followed by a larger table and more room for Putin's demands. The same dynamics make the Baltic crisis sketched in January both viable and affordable. If sabotage, drones and threats bought Moscow a negotiation over NATO's posture, a manufactured crisis in a Baltic state after a withdrawal to the 1997 line would cost less and promise more. Europe met in Berlin to claim a seat the United States has not offered, while the transatlantic link remains weak and divided over Ukraine, and declarations of support alone will not become a negotiating role. Europe must turn its commitment to Ukraine into leverage the parties in Shenzhen cannot ignore: the financing that keeps Ukraine fighting, the sanctions regime, and the forces it is preparing for postwar guarantees. Until it does, Europe will be discussed in rooms where it is not present, and the chain will keep searching for its next vulnerability.

What the Midterms Can and Cannot Change

The November 3 election gave Democrats both chambers by wide margins, 56 seats to 44 in the Senate and about 260 to 175 in the House, although the new Congress will not be seated until January 3, 2027. The incoming majority has announced its intentions: an aid package of about USD 15 billion and a rewrite of the Graham Act, the Financial Times reported. Several of Washington's October decisions on Ukraine policy and narrative may have been driven by the election campaign. Facing record diesel prices that economists trace chiefly to the Iran war, the president blamed Ukraine's strikes on Russian refineries and refinery closures in Democratic-led states, called for Zelenskyy to be replaced, and struck a diesel deal with Putin. The electoral motive for blaming Ukraine has expired: after the defeat, President Trump attributed the prices to Iran himself, while the policies adopted in those weeks, the sanctions waiver and the diesel arrangement, remain in force.

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The midterms changed the majority in Congress and left unchanged who negotiates for the United States. For the next two years the talks might be led by the same president and the same envoys, and the Constitution gives Congress no seat at that table. The real question is whether majorities in both chambers amount to a lever over foreign policy, and, more importantly, over how it is carried out. On paper, the tools exist: the budget, sanctions law, oversight, and the Senate's consent to treaties. In practice, each of them runs through the executive. The Graham Act shows the limit. Congress passed it by large majorities, 86 to 11 in the Senate and 262 to 159 in the House; the text itself gave the president a national-interest waiver, and he used it within a month of signing. A new law without a waiver needs his signature or two-thirds of both chambers, and the Act's own vote in the House, 262 of 421, fell short of that; in the new Senate an override would need at least eleven Republicans. Even if a law passes, the administration applies it and decides how hard to enforce it. Ukraine is also not among the new majority's first priorities, and the main levers of foreign policy stay in the president's hands: Congress can constrain him but cannot replace him in diplomacy.

Three instruments remain within reach of the new majority, and they are of unequal weight. The first is the Senate's consent. Any guarantee to Ukraine meant to outlast this presidency must be a treaty, which requires a two-thirds Senate vote, because an executive agreement binds no successor, and the Secretary of State has already pointed to the difficulty of winning that vote. A Senate that insists on seeing the text can prevent an empty guarantee from being traded for real territory. Second is the power to lock in American commitments in law, as Congress did in 2023 when it barred any president from leaving NATO without the consent of two-thirds of the Senate or an act of Congress. The third and weakest is oversight. Hearings and subpoenas cannot reverse a decision, yet they can establish who ordered the Starshield limits and on what grounds the sanctions waiver was certified, and so raise the political cost of the next one.

The developments traced in this article strongly suggest that President Trump's strategy is aimed at a grand deal with Russia on the European and transatlantic security architecture. That course will be hard to change while he is in office, since Congress can slow it and expose it but cannot negotiate in his place. That leaves the outcome where the kill chain has always left it: those being asked to pay. Russia stands closer to the fourth step than at any time since 2021, and it can complete that step only if Ukraine surrenders or Europe accepts a place in an architecture designed in Moscow. Buying a temporary pause at the expense of principle or territory would validate the chain and invite its next round. By Russia's own strategic logic, that round would target NATO itself, because Moscow has never been this close to even a chance of undermining the Alliance's credibility.

Putin also understands that time is no longer on his side, now that the election has made Washington's future position less certain. Europe and Ukraine therefore cannot wait for Washington to correct itself. If they refuse the concessions step, with one voice and in advance, the chain stalls again as it did in 2022; if they do not, the next two years may divide Europe along the 1997 line ■