

Russia calmly reacts to Trump's ultimatum on the Ukraine war

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On 14 July, during a press conference with NATO Secretary General Mark Rutte, US President Donald Trump announced a new mechanism to support Ukraine. Under this arrangement, European allies would most likely: 1) be permitted to purchase armaments and military equipment (AME) for Ukraine from the US defence industry, bypassing the existing order queue, 2) transfer their own AME to Ukraine and promptly replenish it through purchases from US manufacturers, 3) hand over AME to Kyiv, with the US swiftly filling the resulting gaps in European stockpiles from its own reserves, after which the Europeans would finance the replenishment of US warehouses. This applies primarily to Patriot systems, but also to missiles and ammunition. Trump also expressed his dissatisfaction with the course of negotiations with Vladimir Putin. He announced that if a peace agreement with Ukraine were not reached within 50 days (by 2 September), he would impose secondary tariffs of 100% on Russia, targeting countries that purchase its natural resources. US media later quoted an anonymous White House official suggesting that the US would impose 100% tariffs on trade with Russia, as well as secondary tariffs of an unspecified level on its partners. In addition, Trump spoke favourably about the prospects of the sanctions bill against the Russian Federation currently under consideration in the Senate, while stressing that his ultimatum was independent of the bill and that, from his perspective, it was not necessary.

A day later, on 15 July, Kremlin spokesman Dmitry Peskov described the US President's statements as serious and said that Moscow was analysing them. Russian Foreign Minister Sergey Lavrov made similar remarks, ironically recalling that Trump had previously set various deadlines for ending the war. He also stated that the US leader was under immense, 'indecent' pressure from the EU and NATO, both seeking to prolong the conflict in Ukraine. Meanwhile, Deputy Foreign Minister Alexander Grushko said he was surprised Trump's statements were not directed at Kyiv, arguing that the West was not genuinely interested in supporting a peace deal. Earlier, Dmitry Medvedev, Deputy Chairman of the Security Council of the Russian Federation, called Trump's ultimatum 'decorative', noted the European Union's disappointment with it, and claimed that Russia had not taken any notice. Russian parliamentarians, experts, and propagandist media voiced similar opinions. Their criticism of Trump – for continuing Joe Biden's policies and failing to exert pressure on Kyiv – was combined with the belief that his ultimatum would not influence Moscow's stance and that Trump might once again change his mind.

Although Washington's decisions are unfavourable for Russia, their limited scope and the uncertainties around implementation mean they are unlikely to alter Russia's aggressive stance. The Kremlin appears to believe that once the 50-day deadline expires, the absence of an agreement and continued aggression will not prompt Trump to take any serious action against Russia.

Commentary

- **Trump is increasingly sceptical about the prospects of negotiations with Russia and more inclined to support Ukraine, but this does not amount to a breakthrough.** The US President continues to act cautiously – both in terms of supporting Kyiv and in his approach to Moscow. The declared assistance for Ukraine will not be financed by the US, despite over \$2 billion from the Presidential Drawdown Authority (PDA) under the 2024 aid package for Ukraine remaining unused. The implementation of tariffs targeting Russia and its trading partners has also been postponed, and it is doubtful that the threat alone will persuade Putin to reach an agreement. The scale and pace of AME deliveries under the new mechanism – if it is utilised – will affect Kyiv's military capabilities. Currently, Ukraine's defensive effort is showing a gradual decline in effectiveness, particularly in the area of air defence. Halting and reversing this trend will only be possible if deliveries reach a scale comparable to that of 2022–2023.
- **Trump's declarations have been received in Russia with relief, as they differ from earlier media leaks suggesting much harsher US measures.** These leaks had particularly referred to the President's potential support for the bill under discussion in Congress, which would authorise secondary tariffs of 500% on states supporting Russia, and the possible delivery to Ukraine of JASSM or Tomahawk missiles capable of striking deep within Russian territory. This is evidenced, among other indicators, by a 2.5% rise in the capitalisation of the Moscow stock exchange observed immediately after the US President's remarks.
- **Trump's decisions are problematic for Moscow as they potentially prolong Ukraine's resistance and delay the prospect of normalising relations with the United States.** The Kremlin had apparently hoped for a gradual halt to US arms supplies to Kyiv, to persuade the US President that the failure of peace talks was Kyiv's responsibility, and to decouple the process of political and economic normalisation from the resolution of the armed conflict. However, Moscow was not prepared to make any concessions that would have increased the likelihood of such a stance from Washington.
- **The US President's declarations reinforce Moscow's belief that, despite his harsh rhetoric, he lacks the political will for a fundamental revision of his current stance.** The Kremlin views this position as a US withdrawal from engagement on Kyiv's side in the Ukraine war, along with a desire to normalise relations with Russia and even to resume economic cooperation. Moscow is therefore focused on the fact that US arms deliveries will proceed on a commercial basis – paid for by European states, which the Kremlin believes lack the political will to fund long-term support for Ukraine – and that these supplies will not include the most lethal weapons capable of striking deep within Russian territory. The Russians have also noted the US President's publicly dismissive attitude towards the Congressional legislative initiative aimed at seriously undermining Russia's

budget revenues. Above all, they interpret the decision to delay the imposition of tariffs by 50 days as a sign of Trump's reluctance to increase pressure on Moscow and as de facto consent to the continuation of Russia's offensive operations in Ukraine.

- **The real impact of Trump's threats against Russia will depend on how they are implemented.** Directly targeting trade with Russia would be of little consequence, as its trade volume with the US fell to \$3.5 billion in 2024, accounting for less than 0.5% of Russia's total trade. However, Russia could be harmed by the imposition of high secondary tariffs on other countries trading with it – particularly those importing Russian hydrocarbons, such as China, India or Turkey. Yet Moscow appears sceptical about this possibility, as such measures would undermine Washington's efforts to conclude a trade agreement with Beijing and to develop comprehensive partnerships with New Delhi and Ankara. Consequently, Russia is unlikely to scale back its offensive operations in Ukraine or soften its maximalist conditions for ending the conflict.