

By George Friedman

While the Munich Security Conference brought together senior leaders from most major countries and many minor ones recently, none was more significant than U.S. Vice President Joe Biden. This is because Biden provided the first glimpse of U.S. foreign policy under President Barack Obama. Most conference attendees were looking forward to a dramatic shift in U.S. foreign policy under the Obama administration. What was interesting about Biden's speech was how little change there has been in the U.S. position and how much the attendees and the media were cheered by it.

After Biden's speech, there was much talk about a change in the tone of U.S. policy. But it is not clear to us whether this was because the tone has changed, or because the attendees' hearing has. They seemed delighted to be addressed by Biden rather than by former Vice President Dick Cheney - delighted to the extent that this itself represented a change in policy. Thus, in everything Biden said, the conference attendees saw rays of a new policy.

Policy continuity: Iran and Russia

Consider Iran. The Obama administration's position, as staked out by Biden, is that the United States is prepared to speak directly to Iran provided that the Iranians do two things. First, Tehran must end its nuclear weapons program. Second, Tehran must stop supporting terrorists, by which Biden meant Hamas and Hezbollah. Once the Iranians do that, the Americans will talk to them. The Bush administration was equally prepared to talk to Iran given those preconditions. The Iranians make the point that such concessions come after talks, not before, and that the United States must change its attitude toward Iran before there can be talks, something Iranian Majlis Speaker Ali Larijani emphasized after the meeting. Apart from the emphasis on a willingness to talk, the terms Biden laid out for such talks are identical to the terms under the Bush administration.

Now consider Russia. Officially, the Russians were delighted to hear that the United States was prepared to hit the "reset button" on U.S.-Russian relations. But Moscow cannot have been pleased when it turned out that hitting the reset button did not involve ruling out NATO expansion, ending American missile defense system efforts in Central Europe or publicly acknowledging the existence of a Russian sphere of influence. Biden said, "It will remain our view that sovereign states have the right to make their own decisions and choose their own alliances." In translation, this means the United States has the right to enter any relationship it wants with independent states, and that independent states have the right to enter any relationship they want. In other words, the Bush administration's commitment to the principle of NATO expansion has not changed.

Nor could the Russians have been pleased with the announcement just prior to the conference

that the United States would continue developing a ballistic missile defense (BMD) system in Poland and the Czech Republic. The BMD program has been an issue of tremendous importance for Russians, and it is something Obama indicated he would end, or change in some way that might please the Russians. But not only was there no commitment to end the program, there also was no backing away from long-standing U.S. interest in it, or even any indication of the terms under which it might end.

Given that the United States has asked Russia for a supply route through the former Soviet Union to Afghanistan, and that the Russians have agreed to this in principle, it would seem that there might be an opening for a deal with the Russians. But just before the Munich conference opened, Kyrgyzstan announced that Manas Air Base, the last air base open to the United States in Central Asia, would no longer be available to American aircraft. This was a tidy little victory for the Russians, who had used political and financial levers to pressure Kyrgyzstan to eject the Americans. The Russians, of course, deny that any such pressure was ever brought to bear, and that the closure of the base one day before Munich could have been anything more than coincidence.

But the message to the United States was clear: While Russia agrees in principle to the U.S. supply line, the Americans will have to pay a price for it. In case Washington was under the impression it could get other countries in the former Soviet Union to provide passage, the Russians let the Americans know how much leverage Moscow has in these situations. The U.S. assertion of a right to bilateral relations won't happen in Russia's near abroad without Russian help, and that help won't come without strategic concessions from the United States. In short, the American position on Russia hasn't changed, and neither has the Russian position.

The Europeans

The most interesting - and for Stratfor, the most anticipated - part of Biden's speech had to do with the Europeans, of whom the French and Germans were the most enthusiastic about Bush's departure and Obama's arrival. Biden's speech addressed the core question of the U.S.-European relationship.

If the Europeans were not prepared to increase their participation in American foreign policy initiatives during the Bush administration, it was assumed that they would be during the Obama administration. The first issue on the table under the new U.S. administration is the plan to increase forces in Afghanistan. Biden called for more NATO involvement in that conflict, which would mean an increase in European forces deployed to Afghanistan. Some countries, along with the head of NATO, support this. But German Chancellor Angela Merkel made it clear that Germany is not prepared to send more troops.

Over the past year or so, Germany has become somewhat estranged from the United States. Dependent on Russian energy, Germany has been unwilling to confront Russia on issues of concern to Washington. Merkel has made it particularly clear that while she does not oppose NATO expansion in principle, she certainly opposes expansion to states that Russian considers deeply within its sphere of influence (primarily Georgia and Ukraine). The Germans have made it abundantly clear that they do not want to see European-Russian relations deteriorate under

U.S. prodding. Moreover, Germany has no appetite for continuing its presence in Afghanistan, let alone increasing it.

NATO faces a substantial split, conditioned partly by Germany's dependence on Russian energy, but also by deep German unease about any possible resumption of a Cold War with Russia, however mild. The foundation of NATO during the Cold War was the U.S.-German-British relationship. With the Germans unwilling to align with the United States and other NATO members over Russia or Afghanistan, it is unclear whether NATO can continue to function. (Certainly, Merkel cannot be pleased that the United States has not laid the BMD issue in Poland and the Czech Republic to rest.)

The more things change ...

Most interesting here is the continuity between the Bush and Obama administrations in regard to foreign policy. It is certainly reasonable to argue that after only three weeks in office, no major initiatives should be expected of the new president. But major initiatives were implied - such as ending the BMD deployment to Poland and the Czech Republic - and declaring the intention to withdraw BMD would not have required much preparation. But Biden offered no new initiatives beyond expressing a willingness to talk, without indicating any policy shifts regarding the things that have blocked talks. Willingness to talk with the Iranians, the Russians, the Europeans and others shifts the atmospherics - allowing the listener to think things have changed - but does not address the question of what is to be discussed and what is to be offered and accepted.

Ultimately, the issues dividing the world are not, in our view, subject to personalities, nor does goodwill (or bad will, for that matter) address the fundamental questions. Iran has strategic and ideological reasons for behaving the way it does. So does Russia. So does Germany, and so on. The tensions that exist between those countries and the United States might be mildly exacerbated by personalities, but nations are driven by interest, not personality.

Biden's position did not materially shift the Obama administration away from Bush's foreign policy, because Bush was the prisoner of that policy, not its creator. The Iranians will not make concessions on nuclear weapons prior to holding talks, and they do not regard their support for Hamas or Hezbollah as aiding terrorism. Being willing to talk to the Iranians provided they abandon these things is the same as being unwilling to talk to them.

There has been no misunderstanding between the United States and Russia that more open dialogue will cure. The Russians see no reason for NATO expansion unless NATO is planning to encircle Russia. It is possible for the West to have relations with Ukraine and Georgia without expanding NATO; Moscow sees the insistence on expansion as implying sinister motives. For its part, the United States refuses to concede that Russia has any interest in the decisions of the former Soviet Union states, something Biden reiterated. Therefore, either the Russians must accept NATO expansion, or the Americans must accept that Russia has an overriding interest in limiting American relations in the former Soviet Union. This is a fundamental issue that any U.S. administration would have to deal with - particularly an administration seeking Russian cooperation in Afghanistan.

As for Germany, NATO was an instrument of rehabilitation and stability after World War II. But Germany now has a complex relationship with Russia, as well as internal issues. It does not want NATO drawing it into adventures that are not in Germany's primary interest, much less into a confrontation with Russia. No amount of charm, openness or dialogue is going to change this fundamental reality.

Dialogue does offer certain possibilities. The United States could choose to talk to Iran without preconditions. It could abandon NATO expansion and quietly reduce its influence in the former Soviet Union, or perhaps convince the Russians that they could benefit from this influence. The United States could abandon the BMD system (though this has been complicated by Iran's recent successful satellite launch), or perhaps get the Russians to participate in the program. The United States could certainly get the Germans to send a small force to Afghanistan above and beyond the present German contingent. All of this is possible.

What can't be achieved is a fundamental transformation of the geopolitical realities of the world. No matter how Obama campaigned, it is clear he knows that. Apart from his preoccupation with economic matters, Obama understands that foreign policy is governed by impersonal forces and is not amenable to rhetoric, although rhetoric might make things somewhat easier. No nation gives up its fundamental interests because someone is willing to talk.

Willingness to talk is important, but what is said is much more important. Obama's first foray into foreign policy via Biden indicates that, generally speaking, he understands the constraints and pressures that drive American foreign policy, and he understands the limits of presidential power. Atmospherics aside, Biden's positions - as opposed to his rhetoric - were strikingly similar to Cheney's foreign policy positions.

We argued long ago that presidents don't make history, but that history makes presidents. We see Biden's speech as a classic example of this principle.

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