To Hawthorn Family & Friends --

Ukraine and Russia --

Last Friday was "Old Pols Day" at Reagan National (as all Fridays probably are). My wife, Ivy Whitlatch, and I first ran into the legendary **Charlie Cook**, turned out in a suit and tie, which prompted my question, "*Going in for sentencing*?" But he assured me he was rushing off to make another (clearly, highly paid) speech. He will eventually settle back at the new Cook Estate on the coast of Maine, where Ivy and I will visit him and Lucy in a couple of weeks, along with others of the Maine summer crowd, colleagues **Nick Mitropoulos** from Boston and **Jeff Tucker** from Tampa.

We than ran into one of the great people in my life of five decades in this arena: **Graham Allison**, Douglas Dillon Professor of Government at Harvard, long-time Dean of the Kennedy School (and, decades ago, youngest dean in the history of Harvard), author of the still-classic seminal work <u>Essence of a Decision</u> and, more recently, <u>Destined for War</u>. A former Assistant Secretary of Defense, Graham remains one of the world's foremost authorities on nuclear issues and is a frequent advisor to the U.S. government and leaders around the world. The highlight of my year at Harvard was his course on international relations.

His current take on the situation in the **Ukraine** is deeply troubling.

At **BEST**, Graham sees (articulated far better than I can report) a situation in which **Putin "declares victory"** having solidified his hold on the Donbas region and a land corridor to the Crimea which he retook some years ago. That will lead to **years of ongoing confrontations** and threats (not unlike Korea, except this time it's not on an isolated peninsula in Asia but in Eastern Europe).

At **WORST**, Graham believes there is a real threat Putin will use **tactical nuclear weapons** to take control of all of Ukraine, creating a horrible crisis for the US and its nuclear allies to respond.

Graham forecast this a couple months ago when he – gracious as always – made time for coffee in Cambridge with me and our newest Research Director, **Liam Matz.** He said then, shortly after the invasion, "*Putin cannot lose in the Ukraine and survive in Russia. Putin HAS to win in Ukraine if he is going to stay in power in Russia.*" And, even more troubling, he noted any successor could be worse for the United States.

Why does Graham agree with CIA Director Bill Burn's judgment that this is a war Putin cannot lose? Because as Graham puts it, if conditions on the battlefield force Putin to choose between a humiliating loss and escalating the level of destruction, he's giving 5-1 odds he chooses the latter, escalation.

And not that far up his escalation ladder for destructive options would be a **tactical nuclear weapon strike** on a military target or even a small city in Ukraine.

While most observers find the possibility that Putin could order a nuclear strike inconceivable, Graham reminds us that when we say something is "inconceivable," that is a statement about what our minds can conceive – not what is possible in the world. He can actually conceive Putin's ordering a first nuclear strike and then calling on Zelenskyy to accept a ceasefire or wait to see what a Ukrainian Nagasaki looks like.

When the smartest man I know on this subject is – despite his always optimistic nature – deeply troubled, we all should be.

Yesterday's Primaries --

Voters went to the polls yesterday in four states with primaries (Maine, South Carolina, North Dakota and Nevada) along with a special congressional election in Texas and the results were about as predicted:

- President Trump had a mixed day in **South Carolina**, winning revenge with the defeat of a pro-impeachment voting GOP House member, but failing to take out another Trump-critical GOP member.

- I think the biggest news was the special congressional election in the heavily Hispanic – and ONCE heavily Democratic – Rio Grande Valley of **Texas** where Republican Mayra Flores won a district that, like the rest of the Valley, has been trending Republican.

- In **Nevada**, despite his family name former Attorney General Adam Laxalt faced a tougher than expected (at least by others, I've always seen him as a deeply flawed candidate) fight to win the GOP U.S. Senate nomination.

  With 85% of the Nevada vote counted, Las Vegas Sheriff and Trump endorsee Joe Lombardo won the GOP Governor nomination, with 38% of

the vote. Former U.S. Senator Dean Heller ran third, with only 13% of the vote, continuing the miserable showing by former senators (See: "Sessions, Jeff" in Alabama). Does this mean **Iowa** U.S. Senator, 88-year-old Charles Grassley is in trouble? Back in **Nevada**, Democrat Governor Steve Sisolak leads Lombardo by 12 points in pre-primary polls, but will have a tough fight.

- **Maine's** governor's race will pit former GOP Governor Paul LePage – a Trump-like pit bull of a governor – against Biden-like "steady and calm" Democrat Janet Mills in a possible predictor of the 2024 Presidential re-match.

The primary we're personally watching with the greatest interest is NEXT Tuesday in **Alabama**, where the now-Trump-endorsed Katie Britt is set to swamp Mo Brooks (who had Trumps initial endorsement before he withdrew it) in the Alabama GOP Senate Primary . . . which is tantamount to election, since November's election in an all-red Alabama is a mere formality.

The Big Picture --

About 10 days *ago* _we taped a short piece for Hawthorn clients sharing our current perspective._

In addition to noting this is sure to inspire cynical emails from my "friends" about how desperately Hawthorn needs better (and younger) on-air talent (I started in radio, not television, for obvious reasons), I would also note this already grim – for Democrats – analysis was taped BEFORE recent reports of:

- inflation at a 40-year high,
- gasoline at a national average of more than $5/gallon for the first time in history,
- a drop in retail spending in May,
- rising interest rates,
- weakening consumer confidence, and
- continuing further declines in the Predsident's job approval and GOP leads on the generic congressional voting question.

John