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Commentary #32

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Sanctions for Sale: Rubio's Athens Doctrine and the Lesson Moscow Learned

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Sanctions for Sale: Rubio's Athens Doctrine and the Lesson Moscow Learned

On 7 October 2026, US Secretary of State Marco Rubio, speaking in Athens with the ancient Acropolis in the background, told Europe that power rests not only on strength but on “the credibility that you are willing to use it”.¹ Two days later, on 9 October, President Donald Trump announced, after a telephone call with Vladimir Putin, that Russia would supply diesel to American and global markets.² The US Treasury issued a temporary general licence allowing the sale, supply and import of Russian diesel until 7 April 2027. **Forty-eight hours were enough to turn a doctrine into a disclaimer.** Governments often use different language when addressing the public versus negotiating behind closed doors, so simply calling US recent actions inconsistent would not be enough for analysis. What makes this case significant is the combination of three circumstances. The deal was made by a president who had signed a sweeping Russia sanctions law three weeks earlier. It was offered to Moscow at a moment of Russian weakness, not strength. And it was announced less than four weeks before the US midterm elections of 3 November. Read together, these facts send Moscow, and every other adversary of the West, a simple message: American sanctions are not a policy but a price, and the price is set by the President himself, according to the electoral calendar.

The Doctrine: Power Measured in Credibility

The Athens speech was not a return to liberal internationalism. It was a manifesto of national power. “Under President Trump, the United States has made its choice,” Rubio said. “We choose the unapologetic pursuit of national power.” He regretted that “the word ‘nationalism’ became a dirty word”, criticised the West for transferring its decisions “to global bureaucracies”, and called on Europe to “awaken from its long slumber”.

Yet the speech also set a standard against which its authors can be measured. Rubio described the ancient Greeks as realists who “understood that nations have interests”, and argued that statecraft requires “the ability to wield force when prudence and diplomacy fail” and “the credibility that you are willing to use it”. His moral hero was “the man who is bound by his word”. Transatlantic friendship, he assured his European audience, “should not be zero sum”.

What the speech left out was equally telling. Russia, Putin and Ukraine are not named anywhere in the text; the only adversary identified is Iran. In a speech delivered in Europe, in the fifth year of Russia's full-scale war against Ukraine, during a trip whose agenda included displacing Russian energy in European markets,³ **such silence is not an oversight. It is a signal and** two days later it was confirmed.

The Deal: Relief Delivered at Moscow's Weakest Point

The first circumstance is the law. On 18 September 2026, Trump signed the Lindsey O. Graham Sanctioning Russia and Iran Act. It extends sanctions to Russian officials, banks, energy companies and shadow-fleet vessels, and directs tariffs of up to 100 per cent on the largest buyers of Russian oil and gas, to be imposed within 30 days of enactment. Any waiver requires a written certification to Congress that it is in the national interest, together with a report explaining its basis. The diesel licence was issued 21 days after signature, before the deadline for the Act's central tariff provisions had even expired. The regime was suspended for a key Russian export before its main enforcement tool had been tested once.

The second is the battlefield. Moscow banned diesel exports by producers on 8 July, after Ukrainian drone strikes on its refineries caused shortages at home, and later extended the ban.⁴ According to the International Energy Agency, Russian refinery output in June fell by 30 per cent year on year, to its lowest level in more than two decades. To deliver under the deal, Moscow has to reopen exports it had closed to protect its own market. Washington, in other words, did not extract a concession from a strong Russia. It

offered a market to a weakened one, and converted a shortage produced by Ukrainian military pressure into Russian export revenue. Zelensky's reaction was precise: "Gifts to Putin will not bring peace or any benefit to the civilized world."

The third is the price. The announced volumes are modest: 300,000 tonnes at once, 500,000 tonnes in November, then one million tonnes, with up to three million more "within a short period of time". The first tranche amounts to roughly 2.2 million barrels. A week earlier, the G7 had agreed to release 100 million barrels from strategic reserves to calm the same market.⁵ The later tranches depend on refinery capacity that Moscow controls and Ukraine targets.

The economic benefit of the deal is therefore small and uncertain. Its political benefit lies elsewhere.

The Electoral Clock

The deal cannot be understood without the US electoral calendar. Americans vote on 3 November. Diesel reached a record of \$6.52 a gallon on 22 September.⁶ In the September Strength In Numbers/Verasight poll, 52 per cent of Republicans and Republican-leaning independents disapproved of Trump's handling of prices, the first time a majority of his own base had done so in that series. A Reuters/Ipsos poll conducted on 17–20 September put his overall approval at 32 per cent; among Republicans, approval of his handling of the cost of living had fallen to 44 per cent, from 70 per cent in January.

The decisions of the preceding week follow this pressure closely. On 5 October, at a rally in Grand Island, Nebraska, Trump signed an order allowing tax-free red-dyed diesel, normally reserved for off-road use, to be used on public roads until 31 December.⁷ GasBuddy analyst Patrick De Haan put it bluntly: "The president is scrambling ahead of the midterms to do something."⁸ Four days later came the Russian deal, justified in Trump's words: "Lower prices for Americans, especially our Great Farmers, Ranchers, and Truckers, is my Greatest Priority." The groups named are not random. Farmers, ranchers and truckers form the core of the rural electorate on which the Republican majority depends.

The same logic extended to allies. In the days before the deal, Washington pressed European governments to release their strategic diesel stocks, and the European Commission publicly pushed back against what it called US "threats", amid talk of a US diesel export ban. On 2 October, the G7 agreed a coordinated release of 100 million barrels through the IEA, front-loaded with diesel. The same day, Trump declared: "We're not going to be doing the export ban." Five days later, in Athens, Rubio told Europeans that the friendship "should not be zero sum". Europe had just drawn down its emergency reserves to ease American pump prices before an American election.

The electoral clock also explains the most puzzling feature of the deal: its form. Before 3 November, its value lies not in the tonnes of fuel, which arrive late and in small quantities, but in the announcement itself. It is a policy designed for the news cycle. Its costs, however, are not symbolic. They are paid in the credibility of a sanctions law, in Ukraine's leverage on the battlefield and in the trust of Europe.

A Culprit Named in Advance

The most common objection to the deal is that it cannot work. Analysts point to negligible volumes, and even Republican Representative Don Bacon said that "propping up Russia's war economy is terrible".⁹ If the White House knows that Russian diesel will not make fuel cheaper before 3 November, why present price relief as the reason for the deal?

The answer may lie less in the fuel than in the explanation attached to it. On 13 September, Trump told reporters that Zelensky "has to stop knocking out diesel fuel in Russia", and that the global shortage "isn't done by the Middle East, this is done by what's happening with Russia and Ukraine".¹⁰ On 5 October he

repeated the claim: what was driving up gasoline prices was “no longer the Strait of Hormuz”, but Russian refineries “being blown up by Ukraine”.¹¹ On 10 October, a US official told Axios that the deal followed Zelensky’s refusal of “half a dozen” American requests to stop the strikes: “The attacks on the refineries cause pain in Russia, but it causes pain for the U.S., too.”¹²

Read together, these statements build a narrative in three steps. **First**, the cause of high prices is moved from the war with Iran to Ukraine. **Second**, the president is seen to act by negotiating diesel from Moscow. **Third**, when prices do not fall, and new reports of Ukrainian strikes on Russian refineries reach American screens, the culprit has already been named. Kyiv has offered to stop the strikes only if Russia stops attacking Ukraine’s power plants, so such reports will continue. Whether the diesel arrives or not, the deal works as a story, and the story turns the victim of aggression into the reason for the American voter’s fuel bill.

The economic record does not support that story. According to the IEA, oil flows through the Strait of Hormuz averaged only 7.6 million barrels a day in August, 13.1 million barrels a day below pre-war levels. Ukraine’s sanctions commissioner, Vladyslav Vlasniuk, exposed the contradiction with simple logic: if easing sanctions on Russian diesel brings market relief, then “the primary impact to the global diesel market was the Iran conflict and blockade”. Narratives, however, do not need to be accurate to be effective. They need a president to repeat them and an audience ready to hear them.

That audience exists. American support for Ukraine has not collapsed, but it has become sharply partisan. In March 2026, 50 per cent of Democrats but only 11 per cent of Republicans said that Washington was not doing enough for Ukraine.¹³ In February 2026, Republican support for military aid stood at 43 per cent, down from 51 per cent in July 2025, while Democratic support barely moved.¹⁴ The fuel-price narrative is addressed precisely to the part of the electorate where support for Ukraine is already eroding, and to the farmers, ranchers and truckers the president named. **For Kyiv, the danger is not one diesel deal. It is an American constituency taught to see Ukraine’s self-defence as a cost at the pump.**

The Asymmetry of Time

Here lies the deeper strategic problem. Democracies live by electoral cycles; the Kremlin does not. Putin faces no meaningful electoral test and can therefore wait. Washington, by contrast, increasingly measures its Russia policy against the next vote.

This hands Moscow a structural advantage, and it has learned to use it. The Kremlin does not need to win the argument about sanctions. It only needs to wait until domestic costs in the United States rise, and then offer relief at the moment of maximum political vulnerability: less than a month before a national election, when a sitting president needs a headline about fuel prices more than a coherent Russia policy. For Russia, the offer was cheap. It consisted of diesel it could not sell before, in exchange for a licence that required no concession on Ukraine.

The literature on credibility helps explain why this matters. James Fearon’s work on audience costs shows that international commitments become credible when breaking them is costly for a leader at home.¹⁵ The diesel deal reverses that mechanism. When abandoning a sanctions commitment becomes popular at home, credibility does not erode gradually - it collapses. Adversaries no longer need to guess whether Washington will hold firm. They can calculate when it will not.

Realism, or Its Caricature

Defenders of the deal will call it realism, and Rubio himself presented the Greeks as realists, but Classical realism valued prudence, consistency and the long-term calculation of interest. What is being practised in

Washington is something different: transactionalism with a horizon of weeks. This is the subordination of long-term interests to short-term electoral needs. The distinction is essential, because a genuine realist would recognise that the credibility of coercion is itself a national interest. Rubio said exactly this in Athens.

Counting the Cost

Even if the deal lowers fuel prices marginally before 3 November, its consequences will outlive the election.

The first cost is to the sanctions instrument itself. The Graham Act's secondary tariffs work only if third countries believe that buying Russian energy will be punished. Major importers will now reasonably conclude that enforcement depends on American fuel prices, and that Washington itself facilitates Russian exports when it needs to. Secondary sanctions without credibility do not deter. They invite bargaining.

The second cost is the lesson for adversaries. If American pressure can be relieved by raising costs for American voters, then the rational strategy for Moscow, Tehran or Beijing is to export pain to Western electorates through energy markets, supply chains and information operations, and let the electoral calendar do the rest. For those who study Russian foreign information manipulation and interference, this is the most disturbing implication: the deal rewards precisely the strategy Moscow has pursued for years.

The third cost falls on Europe. European governments are asked to spend more on defence, to give up Russian energy at considerable expense and to stand together against Moscow, while Washington relieves its own costs through a bilateral arrangement with the Kremlin and leans on Europe's emergency reserves to lower its own pump prices. This asymmetry will strengthen those within the EU who argue that Europe should not carry the cost of isolating Russia alone. Member states that have long resisted sanctions will not miss the precedent.

The fourth cost falls on Europe's eastern neighbourhood. For Ukraine, Moldova, Georgia and Armenia, alignment with the West has always been a calculated bet against Russian coercion, and the value of that bet depends on Western constancy. Every visible American reversal becomes an argument for those, in Tbilisi above all, who claim that the West is unreliable and that accommodation with Moscow is the safer course. Georgian Dream could hardly have asked for a better gift.

Conclusion

Rubio was right in Athens: power requires credibility. The diesel deal shows that the administration he serves treats credibility as a currency to be spent when the polls turn, not as capital to be protected. The benefit of the deal will be measured in cents per gallon and in days before an election. Its cost will be measured in years.

For Europe, the conclusion is practical. The EU must anchor its Russia policy in instruments it controls, namely its own sanctions regime, enforcement against the shadow fleet, long-term financing for Ukraine and complete independence from Russian energy, rather than in the electoral calendar of its ally. Rubio asked Europe to awaken. It should, not in order to follow Washington, but to become the partner whose commitments do not depend on the price of diesel.

Moscow has learned that American sanctions have a price. Europe must show that its own do not.



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¹⁵James D. Fearon, “Domestic Political Audiences and the Escalation of International Disputes”, American Political Science Review 88, no. 3 (1994): 577–592.