



UKRAINE WAR - THE END STATE

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As the conflict in Ukraine enters its 75th day, while Russia continues to gain territory, at the cost of life and equipment, the end is not very clearly near. When the war began on February 24, 2022, Russia was hopeful of using its favourable force asymmetry to capture Kyiv quickly and put a friendly regime. The same did not happen. There was speculation that during the May 9th “Victory Day” parade, Russian President Putin could declare some kind of victory¹, or alternatively, announce a major bigger assault on Ukraine. Certainly, Putin would like to showcase Russia as a strong and victorious nation. The current action involves heavy and bloody fighting around the Azovstal steel plant in Mariupol, southern Ukraine. Putin had been hoping to claim Mariupol as a key prop in the Victory Day celebrations.²

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The West continues to support Ukraine with funding, military equipment, and intelligence. US officials have said they shared information about the location of the Russian warship Moskva³ with Ukraine prior to its sinking last month, but the decision to strike was their own. While Ukraine has been successful in defending Kyiv and repelling Russian forces, there has been a significant loss of territory in the east and in the south. These areas are of much greater importance to Russia and are a critical part of their endgame requirements. As per the ground position map of May 5, 2022, released by the Institute for the Study of War⁴ (Figure 1), Russia controls significant parts of Eastern Ukraine and dominates most of the Black Sea except Odesa. However, the entire Donbas region is still far from under their control.

Figure 1: Areas of Russian military control in Ukraine

The West imposed sanctions against Russia and they were initially seen as likely to collapse the Russian economy and ground the Russian Armed Forces. This, however, did not happen. After the initial crash of the Russian currency, the Ruble⁵, it not only regained its value but is actually stronger against the dollar than the whole of last year. Russia continues to sell oil and gas, including to Western countries. Its arms sales commitments, including the S-400⁶ to India, are on schedule. Meanwhile, NATO has been revitalised. Sweden and Finland have announced their desire to join NATO. More European countries are eager to spend more on defence. Therefore, the first possibility is that the war is being forced to drag on.

Implications if War Drags On

The West would make attempts to get Russia bogged down. Exactly like what happened to the Americans in Vietnam and later in Afghanistan, or what the Soviets faced in Afghanistan. This would cause economic and human loss to Russia and weaken it in the long term. It would also weaken the all-powerful and autocratic President Putin. But it would also mean great human loss and devastation for Ukraine. Ukraine is not powerful enough to be able to expel Russia from the territories already occupied by Russia, including Crimea occupied earlier. However, Russia may not be able to take over full control of Ukraine. The loss of the cruiser Moskva⁷ and a large number of Mani Battle Tanks (MBT) has caused embarrassment to the Russian war machine. But Putin is unlikely to settle for anything short of getting a Ukrainian guarantee of neutrality vis-à-vis NATO. Notwithstanding that the war was meant to prevent the strengthening of NATO, it has actually helped consolidate it.

After repulsing Russian forces from Kyiv and with cheering European leaders, could President Zelensky also want to keep pushing war to get closer to the West? A divided Ukraine will have a chance to rebuild later with Western help and will become a staunch opponent of Russia in the long run. Ukraine is hoping to settle the war on better terms. However, the loss of life on both sides and the brutality may make things difficult to negotiate. These

nations, which were once closely related, could become adversaries for generations. Yet the world has seen that even after the very long World Wars, adversaries become friends based on new geopolitics. Extended war would also impact global supply chains as Ukraine is the breadbasket of Europe and disruption of Russian natural resources would mean economic chaos and inflation around the globe. Would the West be prepared for such hardships?

There are also some indications that Putin is not a man in a hurry and may be preparing for a war of attrition. Russia has seen through the very long and bloody World War II in which it came back from the brink of defeat. Russia will certainly want to keep most of the Donbas region and the cities of Kharkiv and Mariupol. It would once and for all like to settle the issue of Crimea. The Russia-Ukraine border would remain fortified for some time.

Ukraine's sole aim is to safeguard its integrity and sovereignty. The bulk of its population prefers a liberal democratic free world political system for themselves. Will the West now leave Zelensky and the Ukrainian people to negotiate their settlement with Russia? It is unlikely. This would complicate things further. An extended Ukraine war would be bad for the European economy. The threat of escalation would continue to loom large. Some form of the cold war rivalry might return. The extended war would help the USA have a greater hold over Europe and also sell more armaments. The Ukrainian refugees will also bring a toll on Europe. The world is already divided in its response to the Ukraine conflict. Many feel that the U.S. military industrial complex has been driving the never-ending wars that the USA has been involved in or supporting. Things will remain complicated for longer if the war goes on. The world awaits to see who blinks first: the European fatigue or the Russian economy.

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Is there a Scope for a Deal?

History is replete with deals emerging despite gruesome wars. After a bloody WWI, many European powers were willing to make deals with a rising Germany before WWII. Stalin was happy if Hitler were not to look towards the Soviet Union. There have been on-and-off negotiations between Ukraine and Russia. Are Ukrainian successes emboldening their stand? Would be it wiser for both sides to come to a reasonable agreement to reduce losses? Russia is much more powerful, and a nuclear power. Since NATO cannot physically intervene, continued war would mean suffering for Ukraine. The Ukrainian successes and the strength to resist can be used during negotiations.

In 2014, after fighting in Donbas, Ukraine, a ceasefire was implemented. The 12 points of the Minsk Protocol⁸ included decentralised power, adopting the Ukrainian law of temporary self-governance for particular districts of Donetsk and Luhansk Oblasts. The fact that the current conflict started, indicates shortfalls in the Minsk Accord. Russia's most important

requirements are Ukrainian neutrality and the creation of a semi-autonomous zone in Eastern Ukraine, which was implicit in the Minsk agreement. But Ukraine chose to forge closer ties with the West and applied for NATO membership. In February 2019, the then Ukrainian President, Petro Poroshenko,⁹ signed a constitutional amendment committing the country to become a member of NATO and the European Union (EU) as his “strategic mission.” But NATO had yet to begin the process. Russia

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has been under sanctions since it annexed Crimea. Obviously, they did not bite enough then. Maybe the newer ones will. Any deal between Ukraine and Russia would have to have the tacit backing of the West. Russia considers the Minsk accord inadequate. But the slow pace of the current invasion and strong Western resolve will make negotiations tougher. Both sides would need to save face.

Putin’s original plan to overthrow and install a pro-Russian regime seems to have failed. Putin is now open to talks with Zelensky. Both sides have to exploit their bargaining strengths. Russia has occupied significant territory. Putin had spelt his requirements in December 2021.¹⁰ These included a halt to NATO’s eastern expansion; a freeze on constructing further military infrastructure in the former Soviet countries; an end to Western military assistance to Ukraine; and a ban on intermediate-range missiles in Europe. Putin would insist on formalising Crimea as part of Russia. The Donetsk and Luhansk regions would be either annexed or made autonomous by the pro-Russian regime. There could be some give and take in the southern areas near Mariupol. Under all circumstances, Ukraine would have to be neutral, with little or no military build-up. Ukraine joining the EU¹¹ will also be a bargaining issue.

Ukraine’s initial stand will be the full withdrawal of Russian troops from Ukraine and the return of Crimea. Lastly, it would want economic integration with the EU. These would not be acceptable to Russia. Many analysts feel that some of the Russian demands must be met as a starting point. Putin wants Crimea and no NATO entry for Ukraine. The West and Russia together can give some other security guarantees to Ukraine. Any compromise must result in sustainable peace. The starting point could be a ceasefire, holding positions and achieving provisional peace, and begin talking.

Russian Victory and European Geopolitics

After the Soviet withdrawal from Afghanistan and the dissolution of the Soviet Union, the first military action seen by Russia was in Syria in 2015. Despite the U.S. predictions, Russia did not get bogged down in Syria, and in fact, succeeded and became a serious player. The West has again been hoping that Ukraine would become a quagmire for Russia, which hasn’t happened yet. Despite initial reverses, Russia has gained enough territory to be able to dictate terms in negotiations. The planned end-state of Russia was to install a pro-Russian

government in Kyiv. For this, the entire Ukraine would have to be occupied, which currently looks unlikely.

If Russia solidifies control over Ukraine, it would be a victory for Putin. It would also be a signal for a relook at European security. A pro-Russian regime in Kyiv could be even worse. A new cold war between two powerful nuclear sides could begin again to the detriment of all. It would mean European economic and political instability.

Russia's control over Ukraine could also be of concern to some other smaller ex-Soviet republics like Estonia. Russian military strength more than matches the entirety of Europe. Will NATO now have to up their defence spending? The most affected country would be Germany, which has traditionally depended on the USA for security. France and the UK would have to take on a greater security burden, at economic peril. The militarisation of Germany will have its dynamics. Would that also mean a greater U.S. presence back in Europe, including more feet on the ground? Turkey, which is a NATO member in close proximity to Ukraine, will also get sucked into the need for greater militarisation. An immediate problem for Europe would be Ukrainian refugees. This new U.S.-Russia confrontation could extend to West Asia, and Africa, and elsewhere.

Surely, economic sanctions are an important weapon against Russia. But it will hurt both sides and change dependencies. Russia will surely retaliate against economic sanctions. It could be through cyber-attacks or by trying to create fissures among EU members. China and other global markets could be helpful. China and Russia will use this opportunity to increase trade in the Rouble and Yuan. If Russia does not get severely dented, it would expose the West. The re-election of Trump or a strong Republican candidate may change the U.S. policy in Europe again.

Any Russian victory in Ukraine would mean weakening the USA's global position. Europe getting bogged down would be good for China as their attention would be taken away from the Indo-Pacific. China may support Russia in the economic war against the West to make it a partner against the Americans and the West in the Indo-Pacific. China is a greater threat and cause of global competition for the USA. By taking on an economically weaker and declining power like Russia, the USA has gotten into a "dual containment" situation. This is not of interest to India and others who are concerned about China's aggressive growth in the Indo-Pacific. America's getting embroiled in Europe could embolden China to invade Taiwan. But European markets are very important to China. China's attempts to consolidate the Eurasian region with its Belt and Road Initiative (BRI) will be negatively affected. Under the present circumstances discretion for the West could be the better part of valour. In case of Russian victory, the West must try and extract a good deal from

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the Russians and make concessions elsewhere. Ideally, they must wean away Russia from China so that the West can concentrate on the greater threat of China. They must bide their time till Russia declines further.

Can Russia be Defeated?

The greatest threats to Russia are the strong resolve of the Ukrainian President and its people. The second is the rejuvenation and coming together of NATO and the Western world. All of them are supporting the defeat of Russia. The West's hold over most of the global financial institutions, internet, and social media companies gives them distinct advantages. Ukraine is clearly winning the information war. By not employing the considerable force that Russia has kept as a reserve for possible escalation, there have been some tactical blunders. Quick gains and an early end to hostilities were important. Increasing hostility among the Ukrainian population would be bad for the long-term and could create an insurgency like situation. Many Russian oligarchs and elites who are close to Putin have wealth invested abroad.¹² The Western narrative gives an impression that many Russians feel that Putin has suppressed democracy, and is behaving like a de facto Tsar. Putin may not lose the military war but could lose support. That may be only partially true. Most Russians like a powerful leader who would make Russia a global power again.

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Another dynamic of the conflict that brings complexity is the close family ties between many Russians and Ukrainians. This will affect the morale of many Russians. Clearly, the physical occupation of Ukraine now seems out of the question for Russia. Putting a puppet regime in place is also unlikely. Nor can Putin create a Warsaw pact like 'wall of nations' between NATO and Russia. Russia cannot be defeated, but it can be economically weakened. A weaker economy would impact technology and military power in the long run. Things will become harder. The West will also try to woo fence-sitting nations into their fold. Isolating Russia excessively could backfire on the West, and certainly, it would make an angry and powerful Russia a junior partner of China to the detriment of the West.

The unlikely loss of Russia and the forced withdrawal from Ukraine would have its consequences. Ukraine could join NATO and the EU. A humiliated Russia would seek revenge. Isolated superpower with huge conventional military and nuclear weapon capabilities can be the most dangerous for the world. Getting Russia into the European fold then becomes even more difficult. Russia in China's lap would be very detrimental to the West. Certainly, the West must expose Russia's mistakes and showcase its unity to dissuade China from belligerent actions elsewhere.

Realistic Way Ahead

The late former Secretary of State Colin Powell once said, “diplomacy is listening to what the other guy needs.”¹³ UN secretary-general Antonio Guterres must actively urge the world to unite and end the conflict. A one-on-one meeting between Putin and Zelensky is important. President Joe Biden must apologise for calling Putin a “war criminal”. The USA must realise how it would react if

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someone delivered rockets near its borders with Canada or Mexico. Yes, accepting Ukraine’s neutrality after so much loss of life would mean victory for Putin. Without losing face on either side, the West must support a solution that addresses Russian sensitivities. Russia needs to be given concessions to wean it away from China. Putin wants Ukraine to give up the Donetsk and Luhansk regions. Zelensky couldn’t accept that. It would be a good idea to negotiate for them to be autonomous regions within Ukraine. The Russian bombing has not been able to break the Ukrainian will to defend, which is a plus for Zelensky. Demilitarizing Ukraine is also Putin’s requirement. How will that be met? But suffering is huge. The Russian hold over Crimea would have to be recognised. A regime change in Ukraine may also be necessary. Instead of confronting it, attempts should be made to integrate Russia into Europe. The Kremlin needs to know that improving its relations with the West is an option. It would be a win-win for both sides. A long-term European security treaty may be signed. Russia must then cease all military operations and leave Ukraine. Russia must get a legally-binding security guarantee from NATO. Similarly, Ukraine, Moldova, and Georgia must get similar guarantees from Russia. Belarus should reverse plans to hold Russian nuclear weapons on its soil. NATO countries must reverse plans to increase defence spending. NATO expansion is put on hold. An appropriate way must be found to reintegrate Ukraine’s and Russia’s food and fertilizer production into world markets. The West must now divert attention toward China and the Indo-Pacific.

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