

How the Ukraine War Will Likely End

by George Friedman - April 5, 2022

As we consider how the war in Ukraine will end, we must first understand how it began. Russia invaded for geostrategic reasons – having Ukraine as a buffer state safeguards Moscow from invasion from the west – and for economic reasons, which have often gone overlooked. The transition from the Soviet Union to the Russian Federation wasn't exactly lucrative. It may have increased total wealth, but Russia remains a poor country. Its gross domestic product ranks just behind South Korea's, a respectable placement but hardly where a superpower should be. And in terms of per capita GDP, Russia ranks 85th, nestled between Bulgaria and Malaysia.

Economic statistics rarely tell the whole story, of course, but in Russia's case they fairly accurately present a country that is poorer than it appears, masked superficially by a top layer of the superrich elite. Life in major cities like St. Petersburg and Moscow is luxurious for the wealthy and bearable for the rest. Life in the countryside is something else entirely.

Individual regimes can't be solely blamed for Russian poverty. The size of the nation, and the difficulties in areas such as transport associated with its size, makes Russia difficult to govern. From the time of the czars, it has been the state rather than shared economic prosperity that has kept Russia together. Often this has been achieved through the security services, which are tasked with maintaining state power, not with building an economy. It's little wonder that the country that boasted the Okhrana also produced a president who cut his teeth in the KGB. Rightly or wrongly, Russia's size and inefficiency tend to demand a strong hand.

This has created an expectation that the state will be strong even if the people are poor. There was pride in the czars and in Stalin – the so-called “man of steel.” But for a ruler to govern Russia, they must demonstrate strength. The intellectuals in Russia speak of democracy and human rights. The people want protection against invaders from without and against impoverishing chaos from within.

Over the years, President Vladimir Putin has made various gestures at improving Russia, but he learned in the KGB that without a strong hand Russia is ungovernable. And he knew that there are two types of strength: The kind that makes other countries tremble, and the kind that keeps homegrown “enemies” in check.

From Belarus to Kazakhstan, Putin has tried, in the only way he sees fit, to rebuild Russia brick by

brick. Ukraine is the biggest brick. He believes he had to take it. Russia was becoming restless. Dissidents were being arrested, and foreigners were dismissing it. Strategy and power forced him to act. But the problem was that his instrument of action, the Russian army, was as ineffective as Russia itself. This had not always been the case. As brutal as military service could be, there was a certain pride in it.

The Russian army today seems disorganized, unimaginative and uninspired. The deployment of force, preparation of logistics and command of the battlefields on all levels simply wasn't there. This was a different sort of Russian army, a bureaucratized one, one more afraid of the czar than of losing to the enemy. Putin demanded a rapid defeat of the enemy. But to rule by strength, you must see clearly and strike decisively at the center of gravity.

Ukraine had no center of gravity, only a widely dispersed light infantry force that provided no single point to destroy. Although that may seem like guerrilla warfare, it is not, and Ukraine surprised its enemy with resilience and unpredictability. The attacker can respond with brutal attacks on the population, but that leaves the Ukrainians with no choice but to fight. The Russian army wasn't designed for this war, hadn't planned for this war and has only brutal counter-civilian action to take. And Putin will take it.

The problem, then, is that Putin cannot stop, nor can he reach an agreement with Ukraine that he will keep. Every deal – except for surrender by the enemy – is a revelation of weakness on the part of a weak country and a weak ruler. The only alternatives are ineffective action because the force he sent to war was the wrong force from a country that didn't have the right one.

He can reach a genuine cease-fire, but if he does, he's finished. Not being able to defeat the Ukrainians, and held in contempt by others, destroys the myth of his power. Continuing the war endlessly reveals the same thing. As this goes on, Putin's primary task is to pretend that the defeat is not happening because anything less than victory is a defeat. Every agreement must end in betrayal, and as it happens with guerrillas, they get stronger the longer the war drags out.

A crucial question is whether Russia has strategic reserves. The army has been in the field for over a month, in weather that is still cold, at the end of a logistical line that is problematic. It has been fighting a highly motivated, mobile light infantry force familiar with the terrain. It cannot go on indefinitely. Russia has to rotate its forces. Strategically, it must send more. Instead, it is executing a bloody withdrawal. You don't fight for the same ground twice unless you have to.

This means that Putin's war plan is shattered. The resistance has been effective and his troops need

a relief he cannot provide. Putin will feint in other directions – perhaps in the Baltics or Moldova – but he lacks the force to fight on another front. He can't sustain this war easily, especially in the face of NATO soldiers who have so far stayed out of the fray.

Even so, I cannot predict what a leader will do in the end. But for now, it's clear to me that Putin will cling to power and blame everyone around him. But every day the war goes on, Putin gets weaker. Ukraine should not be able to resist, NATO should not be united, American economic warfare should not be so powerful. Putin is growing more desperate. He has mumbled about nuclear weapons, the sign of utmost desperation. But he knows he and anyone he may love will die in a nuclear exchange. Even if he is prepared to commit suicide rather than capitulate, he knows that the order to launch must go through several hands, and each of those hands knows that the counterstrike will kill their loved ones. Therein lies the weakness of nuclear war: Retaliating is one thing, initiating another. Putin trusts few people, and he doesn't know how reliable anyone would be in this situation – nor what the Americans might do if they saw preparation for a Russian launch.

If Putin gives up his position, he is compromised, and perhaps lost. The buzzards are circling. So he must continue to fight until he is forced out and someone else not responsible for the disaster takes over and blames it all on Putin. I think that this can't end until Putin is pulled from the game.

Obviously, I am moving here away from geopolitical analysis into the political. The former tries to minimize individual influence while the latter emphasizes it. That gives my forecast an inevitable imprecision. But given the situation on the ground, and given Russian internal dynamics, it does seem that all the forces coming to bear on Putin dictate a certain direction. The war will end, but the war is evolving in a way that creates unique pressures on the Russian political system, and, because of the nature of the system, that pressure pivots on Putin.

This is not the only outcome. Ukraine might collapse. Russia might collapse. The Russian army may devise a strategy to win the war. A settlement that is respected might be reached. All of these are possible, but I don't see much movement in any of these directions. A political end is what I would bet on, with the Russians taking the short end of the stick. I wouldn't have thought this on the first day of the war, but I think this is likely the shape of the last day.

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