

Peace Accords

by George Friedman - December 6, 2022

Russia has accepted Washington's invitation to engage in peace talks over the war in Ukraine. Both, of course, have reservations. Russia's is that it needs to continue to hold territory in Ukraine, America's is that it needs to make sure Russia surrenders its territory in Ukraine.

It would seem, then, that peace is unlikely, and that the talks are therefore useless to begin with. But that is not the case. Any bargain over a serious matter starts first with a gut check – an attempt to see how deeply the other side is committed. Bargaining begins with each side making demands that are so unacceptable that they anger the other party. It's a position that makes a deal impossible. Both sides know as much and understand well that their own positions are going to be rejected. More important is how they are rejected. If the response by either side is "Your proposal means that there can never be peace, and our intelligence has compromising pictures of your partner," then that's instructive. Personalizing the offer with vile insinuations provides excellent guidance, and will likely receive a reply of massive air attacks.

In this case, the United States offered to negotiate without mentioning its core demand: that Russia withdraw. Moscow replied by openly stating that Russia is prepared to withdraw from all of Ukraine save two important areas. The Americans tried to imply that Russia's "withdrawal" is neither a withdrawal nor in the forefront. Russia's response was that a complete withdrawal is a nonstarter. But since two areas were mentioned, one close to Russia, another in south Ukraine, both are extremely difficult for the U.S. to cede because of the political consequences.

All wars end. Some end in the devastation of the enemy, and some end with the exhaustion of one side. Others end with one side unable to continue the war because it sees no way in which to impose such costs on the enemy that it can continue fighting. Forces are not crushed so much as drained, with little hope of continuation.

The current situation is more complex. The war in Ukraine is ongoing, and neither side is crushed or exhausted. Neither has concluded that victory is unreachable. The Ukrainian army itself is divided between Ukrainians and Americans; Ukrainians continue to fight, however wearily, while the Americans send money and equipment without incurring casualties. Put differently, they have very different skin in the game. Ukrainians are fighting for their country, so any inch lost is agony.

Washington simply wants to keep Russia away from the eastern border of NATO. It's not an existential situation. The same can't be said for Ukraine.

The logic here is for the Russians to attempt to break the Ukrainian army, since extreme casualties might force them to collapse or sue for peace. The strategy for Ukraine is to meet every Russian advance with a counterattack, supplemented as it is by massive U.S. firepower. In the end, the war will be determined by the depth of forces on each side as well as their willingness to fight and die.

All of this suggests a war of attrition. Think World War I but without trenches. The Russians initiated combat, and any admission of failure would threaten the government. Ukrainian concessions would be tantamount to an end of the country, or at least an abdication of its independence. From the American point of view, continuing the war is better than defeat, since U.S. security guarantees to other allies would be on the line. (For this reason, I don't think Washington will involve itself too much in the fine print.)

Under these circumstances, it would appear that the war cannot end. But each country has an imperative not to be broken and not to capitulate. And no one, save the Americans, can walk away. Reality is the ultimate gut check. Ukraine and Russia will posture until the end, even if neither knows exactly what its breaking point is. Each hopes the other is approaching that breaking point, and each wants to avoid reaching it first.

It is this mutual fear of failure that drives each to a negotiated settlement, however contemptible and belligerent that process will be. The opening gut check is followed by an emerging reality of how much you can play and how much your enemy can play, two variables that are considered every day by leaders and soldiers alike. Unthinkable concessions then become thinkable. The hazier this is, the more each side will be frightened that they will suddenly break.

Volodymyr Zelenskyy wants an independent Ukraine, Vladimir Putin wants to be president of Russia, and the U.S. wants to end the war without American casualties. None is as confident as he appears.

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