

Remember Ukraine?

by George Friedman - November 21, 2023

Some of you may remember Ukraine. Just a few months ago, it was all the talk. Since then, war has broken out between Hamas and Israel, a potentially game-changing summit took place between the United States and China, and Elon Musk grabbed headlines again. Between the tragic and the absurd, we have somehow managed to routinize the conflict in Ukraine.

Routinizing Ukraine is not unreasonable; the war has trended in that direction. There have been many battles involving advances and retreats. But none of the movements or battles have been decisive, which means Ukraine continues to fight for its survival. None of the fears the participants had about entering the war in the first place are illegitimate. And the stakes – a potential redefining of Europe – technically remain in place.

Wars in which all sides have reasonable fears are the most dangerous. No side can quit, and until one side achieves an overwhelming advantage and imposes a new reality, the war must go on even if the losses are difficult to endure. Absent an overwhelming advantage, compromise becomes necessary, but it can be equally hard. In this war, there are still expectations that Russia will destroy the Ukrainian army and force the U.S. to silence its guns. This has not happened. The primary reason is that Russia is short on troops, and since drafting them into service is extremely unpopular, Moscow has had to improve its recruitment, relying on large bounties for enlistees – some 12,000 rubles (\$137), according to the Atlantic Council – and asking for donations from a sympathetic public to purchase equipment. Mints are a major weapon of war, and it's unclear if Moscow is printing any more money. The fear of inflation is likely a consideration.

Things are difficult for Ukraine too. The army has had little success in the field lately, and Poland has blocked trucks from crossing its border with Ukraine. This is not trivial. Poland has been deeply anti-Russian for years, has been one of Ukraine's strongest supporters, and agreed to be a base for U.S. and European weapon transfers into Ukraine. Poland has not abandoned Ukraine entirely; the source of the border dispute is a perception that Ukrainian carriers are unfair competition for their Polish counterparts. In peacetime, this is a reasonable issue. In wartime, it is not. How much this will affect the Ukrainian economy is unclear, but it will certainly affect morale, and it will likely make the U.S. wonder whether its de facto supply depot will allow weapons to go to Ukraine in the coming months. (For its part, Russia will correctly see this as a sign of weakness.)

It is in this context that U.S. Defense Secretary Lloyd Austin arrived in Ukraine to declare that Washington still stands behind its ally. Though the exact purpose of Austin's visit is unclear, it's never a good sign when an ally has to declare its continued support under unknown circumstances. In truth, Austin is there in his capacity as a Cabinet member and political figure, not a general, and speaking on behalf of his government, he will likely note that Ukraine is in as bad a position as Russia. They are losing options – both in their desired outcomes and in their ability to wage war.

And though I don't have any personal knowledge of the matter, I assume Kyiv will try to negotiate an end to the conflict. I suspect this would not be a problem for many Ukrainians. The end of the war would have to give Russia some increased buffer zone without bringing it too close to the NATO countries on the border with Ukraine. Ukraine will not win, nor will Russia. Clearly there are talks underway at some level between Russia and the United States. Whether my solution has merit is dubious. That we are near the end of the war (expressed in months) is not. Perhaps the world's relative indifference to Ukraine and Russia will send a signal to both.

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