

# Strange Events and the Future of the Russo-Ukrainian War

by George Friedman - July 26, 2022

Russia and Ukraine have signed an agreement to permit the shipping of grain through the Black Sea to world markets. A few hours after the agreement was signed in Turkey, Russia attacked the Black Sea port in Odesa. President Volodymyr Zelenskyy has also fired his security chief to investigate allegations of treason and dismissed his chief prosecutor and other officials – all while a U.S. congresswoman asks President Joe Biden to investigate Zelenskyy's chief of staff for his alleged ties to Russia. The war is becoming complex.

The decision to permit shipments of wheat makes sense for the rest of the world. Ukraine is the fifth-largest exporter of wheat, accounting for a little under 10 percent of global supply, and the Russian blockade drove the price of grain up dramatically. Whatever sense the agreement makes, though, it is unheard of for two nations engaged in war to reach formal agreements on the side. Stranger still is that though Russia benefits from the agreement too, it is far more beneficial for Ukraine, which not only receives more revenue but also gains a sense of security for its Black Sea ports. The attack on Odesa was no doubt meant to remind Ukraine that such agreements can be abandoned quickly, but the fact that it was reached to begin with is odd nonetheless.

Also startling is the firing of senior officials. Zelenskyy claimed that they were guilty of treason. General corruption is one thing, especially in the former Soviet Union. The invocation of treason is quite another. In some quarters of Kyiv, support for Russia is nothing new; Ukraine has more than its fair share of pro-Russia sympathizers. But if, say, the FSB had penetrated Ukrainian security – which is likely – then the weeks of speculation about their job security makes little sense. If senior officials are found to be compromised, their removal would be instant. Instead, Zelenskyy destabilized his government and unnerved his allies. (Of course, it could have been a foreign intelligence service that detected the breach, and Zelenskyy may have been reluctant until forced to act. As in all such matters, those who know don't talk, and those who talk don't know. What is clear is that this sort of matter in the course of war is not normal.)

Russians and Ukrainians sitting side by side can't help but bring to mind the possibilities of a peace treaty. The firings in Kyiv seem to indicate a degree of instability and discord in Ukraine, creating the possibility, however remote, that new considerations are being made that could lead to some kind of

larger deal.

The war has been raging for five months – six months if we count the noisy leadup. It has not gone as Russia hoped. Moscow's initial offensive, a three-pronged attack on Kyiv, Odesa and Donetsk, failed for a variety of reasons: the limits of Russian logistics, the difficulty of coordinating an armored system at distance, and above all Ukrainian tactics and American weapons. The Ukrainians fought an infantry battle with a decentralized command structure and tactical mobility, and they did so with weapons such as Javelin missiles that were ideally suited for combatting the Russian army.

The Russians were forced to retreat to the east as they fought for the Donetsk region, a relatively small area along the Russian border in which Moscow already had a large presence. Moscow has been engaged there for five months, with mercifully short supply lines to Russia proper, and is now almost in control of the area. Even this highly vulnerable region predisposed to Russian victory took months to subdue. The experience there signals a long war in which Russia will struggle to project force over increasingly large areas of a country it does not really occupy.

Ukraine, meanwhile, may have had the luxury of resting and training its infantry to the west and north, but it cannot be sure of how it'll fare against new Russian tactics. Kyiv has the advantage of American weaponry and intelligence, and in theory it has the capability to at least resist a Russian offensive even if it cannot launch a larger one of its own. This is why instability at the top of the Ukrainian command is a problem. It's possible that Zelenskyy is simply cleaning house in preparation for a Russian offensive, but that doesn't explain why he dragged his feet on the dismissals. Russia might strike sooner rather than later, but the unrest at the top is likely going to trickle down to lower levels. Officers linked to offenders may lose focus, or troops might lose confidence in the chain of command. It is one thing to fight a war based on unity of purpose. It is another thing to fight the war with the chain of command uncertain.

Though it's unclear what exactly is happening in Kyiv, the Americans and the Russians are likely well informed. Assuming they didn't force the firings for reasons unknown, the Americans will be pressing to contain the purge until a later date. The Russians, who certainly have assets in the Ukrainian government and military, will seek to destabilize.

Of course, there's a chance that the firings were a minor event amounting to little more than domestic political machination. But that doesn't seem likely. More likely is that the war has created tension and risk at the highest levels of authority. The immediate challenge for Ukraine is to contain the issue before it affects the army.

Both sides, then, would seem to have an interest in a negotiated settlement. The problem is that neither side can afford one. Russia's objective was to make Russia, and Moscow in particular, secure against NATO (read: American) actions. So far, the distance to Moscow is where it was when the war started. Russia cannot accept a peace that does not move Russian control far to the west. Ukraine, and by extension the United States, might be interested in a stand-still. Russia can't accept that without risking confidence in the government.

And it's not a given that Ukraine would settle for it either. There is clearly dysfunction at the top. If Kyiv were to cede major portions of territory to Russia, things would get only more dysfunctional. For the West, moving the Russian border closer to Eastern Europe would not end the war; it would only create the pretext for the next. The closer Russia is to the western Ukrainian border, the more it must be assumed that Russia would choose to move farther still. True or not, it must be assumed.

As the risks mount for both sides, a settlement seems likely. The agreement on grain was obviously signed with some notion of what it could mean. The concept of a peace agreement is sound, but the geography of such an agreement, and the imperatives on both sides, seems to make this impossible. What is needed here is fear.

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