

Engineering an End to the Ukraine War

by George Friedman - March 19, 2025

When the United States entered talks with North Vietnam near the end of the Vietnam War, it hadn't been militarily defeated, but it had failed in its mission to destroy the Viet Cong. North Vietnam had not won the war either, but the outcome of the conflict was clear: Neither side could fully subdue the other. Geopolitically, South Vietnam was more important to North Vietnam than it was to the United States. North Vietnam could not capitulate. The U.S. could.

The Vietnam War was the product of geopolitical imperatives, and the outcome was a result of the military reality. The war ended with negotiations that lasted for a very long time. The peace talks were not geopolitical in nature. Rather, they were a matter of engineering a settlement that acknowledged a geopolitical reality in which both sides had to take into account internal political circumstances. The U.S. could not simply admit to total military failure, so it demanded "peace with honor." The North Vietnamese had to justify the cost of the war to North Vietnam's public as a heroic defeat of the imperialist power.

The initiation of the war was based on geopolitical necessity. North Vietnam had to unite the entire country under a communist regime. The U.S. had to stop it, not because Vietnam mattered geopolitically but because Washington feared that early capitulation would cause allies to lose confidence in the U.S.-based alliance systems. The stakes were high for both sides, but North Vietnam had more skin in the game. The reality of the negotiations was about what the end would look like and the political image it generated.

The same is true for the Ukraine war. Each side wants to pay the lowest political price for anything more than it won. Russia wanted to regain Ukraine as a buffer against the West. The U.S. didn't want Russia to border NATO. The war has been fought, and it looks as though Russia gained a buffer in east Ukraine, albeit a smaller one than it wanted. The U.S. wants to end the war and has to be satisfied with the outcome. Ukraine is now in the same position during the negotiations with Russia as the South Vietnamese were in the Vietnam War.

The end of the war is inevitable, and articles are now appearing in the media about the postwar reality. Some observers talk about how hedge funds are eager to invest in Russia. Others say Russia will have a high price to pay as it moves away from a wartime economy. Others still speculate about

the geopolitical effect of the war on Europe and China.

The outcome of the war is clear, and the problem now is no longer geopolitical. The negotiations are an engineering process that may fail and resume over an extended period of time, with or without the fighting continuing. The negotiations are partly about the exact terms for the war's conclusion. But that is also a domestic political issue. Russia cannot appear to have lost the war, and it will try to convince its public that it won. The U.S. will try to convince its people that it alone ended the war. Political positions inside both countries are at stake for both leaders.

Both must also consider what the postwar world will look like. However it ends, it will help to produce a geopolitical order that will stun the world. (It was not obvious, after all, that a Cold War would emerge from World War II.) The U.S. and Russia having common interests is a stunning thought, indeed.

But all this can fail, and the end still could be a long way off. Negotiations are based on geopolitical reality, but they are also based on international and domestic political circumstances. We saw the first official tiny step on Tuesday. It is an engineering project in which both will seek peace with honor. And while the war will end in the form the militaries created, the settlement will be a matter of statecraft, as all political negotiations are. Bluff and bluster are the tools of negotiations, though human factors – pride and shame – will play a part too.

The war – and the forces that led to it – can be predicted. Its outcome can be surmised, but the negotiation process is a human project that will reach some conclusion long or short, filled with fear and hope. In the end, it must confirm what is, perhaps with a gloss of mutual satisfaction.

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