

# The Emerging Order

by George Friedman - March 29, 2022

I am writing this from Dubai, on a trip I will describe on my return to the United States. A summit was held in Israel over the weekend between Bahrain, Egypt, the United Arab Emirates, Morocco, Israel and the United States. The meeting was designed to back the U.S. into a corner. The United States wants to reach a new understanding with Iran, roughly built on the negotiation platform that was abandoned by President Donald Trump in 2018 as insufficient in dealing with the Iranian threat. Israel and the four Arab countries, plus some others, oppose the Biden initiative, and U.S. Secretary of State Antony Blinken was there to persuade them. It did not seem to work. A paper in Dubai headlined that a new Israeli-Arab front had been created. The question has been frequently asked if unity among Arabs and Israel might be reached. The answer seems to be that it's possible due to fear of Iran and hostility toward American plans for Iran. I have nothing to do with any of this, but watching from close up is always interesting.

My focus remains on Ukraine and Russia and what is emerging as a truly tragic outcome. More talks are scheduled to be held this week in Istanbul. The tragedy is that the settlement being discussed appears to affirm what had originally been the case. The Russians are now claiming that their only intention in the war was to secure the eastern Donbas region, not to occupy Ukraine. Going to war over that would appear to be pointless, since much of the Donbas region has been under informal but very effective Russian control since the events of 2014. It is a region dominated by ethnic Russians, and while Ukraine was not happy with the occupation of Ukrainian territory, it was hardly in a position to seriously challenge Russia. What made the Russian claims dubious, of course, were the columns of tanks heading south from Belarus toward Kyiv, among other things. They seemed to be making war on Ukraine in general and not merely formalizing control of an area they already controlled. It is likely that their demands are going to be more extreme, demanding control of the land between Donbas and Crimea, in effect seizing southeastern Ukraine. But as I said, they fought a war designed with even broader ambitions.

The Ukrainians seem prepared to discuss ceding Donbas and promise Ukrainian neutrality. It is not clear what neutrality means in this context. Switzerland claimed neutrality during World War II, which meant that Germany and the Allies both took advantage of its banking system and operated espionage organizations there. That's one kind of neutrality. Another kind is Sweden's. It is not in NATO and has limited acquisition of Western military equipment, but no one doubts where it stands.

What would neutrality mean in Ukraine? Ukraine may not join NATO and may take care to buy Chinese equipment, but after the events of the past month, it is difficult to image Kyiv equally trusting Western Europe and the United States and also Russia. There can be formal neutrality and neutrality over weapons acquisition, but Ukrainian intelligence will likely be swapping information with the West rather than with Russia. How can Ukraine be neutral in such a situation?

The obvious way is to obfuscate. The reality is that Russia demonstrated that it is incapable of carrying out large-scale, multi-front operations and therefore must halt operations. The Ukrainians have demonstrated the ability to raise and organize their population to resist and on occasion defeat Russia, but they cannot continue to absorb the casualties Russia could inflict by sheer weight of forces, however incompetent Russia's war effort. In the end, Russia can replace its generals, retrain its midlevel officers, and discipline and motivate its enlistees. It will take years, but it can do it if it develops a new culture of political warfare. The Ukrainians cannot protect themselves against a well-armed, well-trained professional force until they themselves rearm and train a professional force. Neutrality makes this difficult if neutrality means acquiring weapons and perhaps training from the West (read: NATO countries) is precluded.

Russia has failed badly in its attempt to occupy Ukraine and is now claiming that it never meant to. Fair enough. Ukraine has managed to resist an incompetent force. Fair enough. But Ukraine, in accepting neutrality, must adopt Swedish neutrality – formal neutrality covering its real intent. And that makes the matter difficult.

That Turkey is running the negotiations is interesting. What occasional cooperation there has been with Russia in the Middle East doesn't hide the historical distrust. Turkey needs a weak Russia. Turkey also has an appetite for Ukrainian territory, having in the past occupied it. Turkey is the perfect interlocutor. Nobody is sure what it wants, and that may make each side cautious.

I started this with the Iranian negotiation, a negotiation that has created what once would have been considered impossible: an Israeli-Arab front confronting the Americans over their opening to Iran. Lean back and imagine how strange this is. And imagine how strange the Russo-Ukrainian situation is. The tragedy is that it took thousands of dead to bring us to the point at which it all started. And

with Iran, it has taken us to a place Iran can't believe it's in: looking for a break from the Americans while the Arabs and Israelis try to rein the Americans in. When we think of the New World Order, look no further.

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