

The State of Play in Ukraine

by George Friedman - December 27, 2022

The war in Ukraine seems permanent. Neither side appears capable of destroying the opposing force or articulating what it would take to reach a peace agreement. The Russians are speaking to Belarus, India and anyone else they might find, but no one can help enough on the battlefield or in the munitions factory to turn the tide. The Ukrainians are speaking to the United States, NATO and anyone else who will listen so that they will continue to receive weapons – perhaps even some new ones. But Ukraine hasn't broken Russia yet, concerned as it is with preventing the collapse of the country, and doing so may prove difficult. On the battlefield, there is movement on both sides, but movement doesn't carry with it the taste of victory. When, then, do wars end if the leadership will not concede?

History shows there are several answers to that question.

1. A war ends when one side lacks the material to continue. Germany's campaign in World War II ended when it was unable to produce and field the weapons needed to fend off the Allied powers.
2. A war ends when one side's morale is exhausted – when soldiers and civilians are simply unwilling to bear the burden of war, even if victory is possible. This was the case for the United States in the Vietnam War.
3. A war ends when there is no hope of a radical increase in military power, and when foreign intervention is impossible. In WWII, Britain persevered knowing it could not defeat Germany but reasonably expecting an American intervention.
4. A war ends when the consequences of defeat seem tolerable to civilians. In World War II, the Italian public saw Allied occupation as a preferable alternative. (Conversely, nations will continue to fight when the cost of defeat is catastrophic.)

There are certainly other circumstances in which a nation would resist beyond hope, and others under which the nation would readily capitulate instead of endure war. But in judging war, the key is less about the military's appetite for resistance, since fighting is what militaries do, and more about the appetites of the civilians, who produce war material and bear a burden of loss and pain that can make the war unwinnable.

To try to understand how the Ukraine war ends, we must consider all these matters and more, but with a particular focus on the willingness of civilians to continue to fight. The publics are undoubtedly tired on both sides, the Russians by the casualties and subsequent calling up of more conscripts, and the Ukrainians by the constant attacks on civilians and civilian infrastructure. The Russians would wish for an end but not at the cost of rebellion by families whose sons were called up. The Ukrainians are constrained by their fear that conceding to the Russians might bring a reign of terror. In this case, the nation most tired of war is also most frightened of the consequences of defeat.

Neither country is concerned with the loss of material. Both would wish for more, but wanting more won't lead to capitulation. Lack of materials could cause one or both to at least look for a resolution. Both sides are currently fighting with a certain level of weaponry. They are not breaking the other side and have no reason to believe their current supplies will do so. The Russians have their own industrial plant, plus imported weapons from places like Iran. Ukraine has a massive flow of weapons from the West, particularly the United States. This has created a stable but unending war. If this continues, there is a serious possibility of loss of civilian morale. Moscow will therefore try to make sure that its industrial plant and relations stay intact while seeking to undermine shipments to Ukraine. Ukraine will try to make sure the U.S. will at least sustain its weapons deliveries while trying to minimize weapons flowing to Russia from abroad.

Because both face the problem of civilian morale, both will try to minimize the civilian fear of defeat. But so long as Ukraine fears a defeat by Russia, capitulation is practically impossible. The same cannot be said of Russia. Thus the most likely outcome will be peace talks, forced by domestic unrest in both countries. There is already some unrest in Russia, but little in Ukraine. The Russians have not been able to stoke unrest there and will therefore have to engage in an even more intense campaign of terror, if they can. But peace talks will not happen until there is a sense of imbalance as described on both sides. There must be an element of compulsion. So the key is the manipulation of the foreign civilian population, defense of the domestic populations and the introduction of new and practical weapons that will impose pain without triggering foreign intervention.

Over time, then, the sense of the impossibility of victory will trigger peace talks, but not until reality forces it.

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