

What Ukraine means for Europe**Jean-Marie Guéhenno**

1 – The endgame of the Ukraine conflict is becoming ever more difficult to predict: conventional wisdom would suggest that, as both Russia and Ukraine suffer more casualties, a mutually hurting stalemate will drive them to a negotiated settlement. But the more suffering and destruction in Ukraine, the more politically difficult it becomes for its leadership to concede; and for Russia, the more troops and equipment it commits to Ukraine, the more difficult it becomes to accept less than a complete victory.

2 – But victory is not in sight: instead, the conflict is turning into a protracted war of attrition, grinding troops on both sides and destroying Ukrainian cities, infrastructure and rural areas. Military analysts focus on the tactical battles in Ukraine, with Russia gaining some ground in Eastern Ukraine, and Ukraine trying to recapture some of the territories around Kherson in the south west. The two fronts do not have the same strategic importance. While territorial gains of Russia in the east have a symbolic political value and might help Russia build a narrative of victory if it could claim that both Donetsk and Luhansk have been fully “liberated”, a consolidation of Russian gains along the western part of the Black sea coast would make a strategic difference. Such consolidation could eventually lead to the capture of Odessa, turning Ukraine into a landlocked country that Russia could then easily dominate. This is not at the moment the most likely scenario, and much will depend on which side weakens first.

3 – The outcome will largely be shaped by what happens outside Ukraine. Ukraine can continue to resist in the east and to push back in the south west only if it gets more support from the West; and Russia will be able to maintain some momentum in its offensive only if it mobilizes deeper support within Russia. The war of attrition in Ukraine will eventually be decided by a much bigger battle of wills between the West and Russia. In the end, Ukraine is just a stage for a broader confrontation, in which both sides have vulnerabilities. Neither in Russia, nor in the West does the home front look very strong.

4 – Over the last three decades, Putin has consolidated power in a very different way from Hitler or Stalin, who relied on the mobilization of the people through mass movements. Putin has done the opposite of mobilizing Russians on a political project: he has encouraged them to focus on their private lives and not to get involved in politics. That is one of the reasons why, on May 9 – the anniversary of the end of WWII for Russia, he did not announce a general mobilization. But now, with ranks of his armed forces depleted, and conscripts in principle not deployed abroad, he is forced to change course and reach out to Russian society to provide the troops and engagement he needs to win the war. That may not be so easy. In Dagestan, a flock of sheep going to the slaughterhouse was painted with the letter Z (patriotic emblem of the war) on their back... This is only anecdotal evidence, but it reflects what is also observed on the internet where searches on how to escape the draft have doubled. The Russian army is an army of poor soldiers who join it to make a mediocre living. Will they continue to join if the risk to their lives keeps increasing?

5 – The picture looks superficially better in the West. The remarkable show of unity of the West – in revitalizing NATO, in adopting wide-ranging sanctions, in transferring weapons to Ukraine, in launching the accession process of Ukraine to the EU – a boost to the morale of Ukraine, with no immediate practical consequences, has certainly surprised Putin, and it has surprised the West itself. The change seen in Germany (shutting down the completed Nordstream 2 pipeline, deciding on a massive increase of its defense spending, and now providing weapons to Ukraine) has been particularly remarkable, even if Berlin, aware that there was no immediate substitute for gas imports from Russia, has delayed the embargo on Russian gas. And Russia’s interest in continuing exports that fund the Russian budget is obvious. However

a scenario in which Russia would act on its belief that it is better at withstanding pain than decadent Europeans seems increasingly plausible. Russia may not wait for Germany to be ready to cut gas imports. It is already sending less gas to Europe under the guise of technical issues.

6 - Even if Putin does not take such radical action, the political scene in Europe and the US will look increasingly fragile, as countries grapple with the aftermath of covid, and the Ukraine war adds a supply shock to the inflation induced by years of lax financial policies and low interest rates. In continental Europe, coalition governments are becoming the rule, and Macron, after winning the presidential election, is now struggling to build a stable parliamentary majority in a very polarized parliament. The United States, now an energy exporter, benefits from high energy prices, but inflation is leading to a paradigm shift in the federal reserve posture, which is raising interest rates, risking at best a significant slowdown of the economy, at worse a recession. And although the war in Ukraine is only a contributing factor to inflation, in both Europe and the United States, the bleak economic situation will feed doubts on the wisdom of all-out support to Ukraine. Public opinion will be increasingly focused on domestic issues which is likely to hurt the Democrats in this fall midterm elections, and in Europe, sky-rocketing energy prices will be a real political challenge. The rhetoric of western commentators calls for the total defeat of Russia, but the public mood is a long way from national unity and sacrifice.

7 – The paradox of this war is that it is often described as an almost existential confrontation between two systems, but at the same time, there is justifiably little appetite for an escalation that could lead to nuclear war, and on both sides, the mobilization of people remains weak, because of the depoliticization of societies, by design in autocratic Russia and by democratic fatigue in Western democracies.



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