

How will the Ukraine War End?

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Larry Bernstein:

Welcome to What Happens Next. My name is Larry Bernstein. What Happens Next is a podcast which covers economics, finance, politics, and science.

Today's episode is How will the Ukraine War End?

Our guest is Stephen Biddle who is a Professor of International and Public Affairs at Columbia University. Stephen previously worked for General Petraeus in Iraq and General McChrystal in Afghanistan.

What Happens Next has an internship program for young adults. Interns suggest topics for the podcast, evaluate books written by potential speakers, and help in the editing process. Today you will hear from one of our star interns Ryan Claffey who is currently a graduate student in international relations at Columbia. One of his professors is our guest speaker Stephen Biddle. I asked Ryan to arrange today's podcast and take the lead in the interview.

What I want to learn on today's podcast from Stephen is what is the current state of the war in Ukraine, will Ukraine lead a counteroffensive in the Spring when the weather improves and if so where, will the war end in a stalemate, will the battlefield be extended into mainland Russia, will additional weapons from the West be a game changer, and what needs to happen for the fighting to end. There is much to cover so buckle up.

I make this podcast to learn, and I offer it free of charge. If you enjoy today's podcast, please subscribe from our website for weekly emails so that you can continue to enjoy this content.

Stephen, can you please begin with your opening six-minute remarks and could you please give an overview of the war, especially how we got to the current state of military conflict.

Stephen Biddle:

Coercive diplomacy failed to yield a peaceful resolution of the conflict between Russia and Ukraine, leading to an invasion. The Russian's expectation when they launched the invasion was that Ukraine would not fight. That produced failure militarily on the ground. And since then, the two sides mobilized and prepared for a longer war. The initial Russian campaign ended in failure to capture the capital of Kiev. The Ukrainian counter offensive rolled back substantial initial Russian gains, that then led to a period of stalemate in the summer in which Russian reorientation away from Kyiv and Kherson toward the Donbas produced offensives that failed.

That then led in the fall to Ukrainian counter offensives that succeeded in recapturing a substantial amount of ground at Kharkiv and in Kherson to stalemate through the winter. Russian offenses at Bakhmut and elsewhere largely failed. And we are heading now into a new season where there will probably be a renewed Ukrainian offensive to cut the land bridge to Crimea though it's hard to predict exactly where the offensive will go.

The initial campaign the Russians mounted was misguided but nonetheless took a lot of ground. Were headed to another round where the Ukrainians will be on the attack, the Russians will be on the defense, and we'll see what happens.

Ryan Claffey:

Current fighting is raging near the city of Bakhmut. Is this a critical battle in the war?

Stephen Biddle:

At current troop levels, the Russians will eventually take Bakhmut. The Ukrainians have been reinforcing to prevent that. If the Ukrainians do not reinforce or counterattack on the shoulders, then Bakhmut will eventually fall. The Russians have been making sustained but slow and expensive progress.

The city has modest military utility. It is not a gateway to other conquests. If Bakhmut falls, there are defenses behind it that wouldn't produce some sort of breakthrough.

The main fight is over its political symbolic significance largely because Zelensky has chosen to give it that. The Ukrainians didn't have to raise the political salience of this fight. The same thing happened over Mariupol, which eventually fell. And if it falls, it will be regarded in the future as another heroic defense rather than as a sign that things are going badly.

The political symbolism for the Russians who will doubtless trump this as a great victory. Going back to Mariupol, Putin just visited the city. The Russians are on the lookout for political symbolism where they can get it too.

The other issue is the attrition consequences of the fight. It's in Ukrainian's interest to let the Russians grind up huge numbers of troops in an attack on a militarily, largely inconsequential city because that will reduce the Russian's ability to respond to the upcoming counter offensive when it happens. So holding it, even if it's not militarily important, is valuable in the long run because it's changing the troop strength in the theater in Ukraine's favor. That argument was probably more persuasive a month ago than it is now. The Russians sensibly have been emphasizing the northern and southern flanks of the city in an attempt to cut the supply line into it and it creates a situation where they can take the city by starving it and potentially encircle couple of brigades of Ukrainian forces.

Ukrainian military geography is profoundly influenced by mud <laugh>. This part of the world has a mud season when the ice and the frost melt, and it becomes extremely difficult to operate heavy equipment off asphalt surface roads. Were in the middle of mud season now in Ukraine. What that means is that if Ukraine holds Bakhmut too long, if they gamble on this and stay longer than they need to, their ability to rapidly withdraw those forces is increasingly questionable as the few asphalt surface roads available become increasingly threatened. There are risks here for Ukraine in sticking this out too long as opposed to just withdrawing.

Ryan Claffey:

What will the upcoming Ukrainian counteroffensive look like?

Stephen Biddle:

The expectation is that the major counter offensive in spring/summer will be aimed at cutting the land bridge to Crimea. The Russians are investing very heavily in prepared defenses in that area, it's not going to be a trivial exercise to close the land bridge. You could imagine a feint to hold those reserves in position and instead a main effort somewhere else.

Some people are throwing out is a counter offensive on the flanks of Bakhmut. One of the advantages of counterattack as opposed to a major offensive is at the moment Russian forces are attacking, not defending, and therefore their positions aren't prepared. Who knows?

Ryan Claffey:

How challenging is it for Ukraine to attack and reclaim Crimea?

Stephen Biddle:

Crimea will be a very tough nut to crack. There's a very narrow neck that connects Crimea to mainland Ukraine, and much of that ground is marsh. So a ground defensive into Crimea across that neck would be exceptionally difficult.

There will be an effort to isolate Crimea logistically, not unlike the Hassan campaign of the fall when Ukraine ultimately succeeded because the Russians were highly dependent on just two bridges across the Nero River, and those were highly vulnerable. Russian forces on the wrong side of the river were logistically starved. Crimea would probably work the same way, an effort to isolate the peninsula, followed by enough pressure to force the Russians to expend munitions, and then an expectation that the Russians would eventually withdraw voluntarily to avoid logistical starvation there. Crimea will be a hard objective for Ukraine.

Ryan Claffey:

Do you think that Ukraine can win this war if the West furnishes sufficient weapons to fight?

Stephen Biddle:

The Ukrainians, if they are appropriately supplied, have structural advantages in the quality and in the number of their forces. Ukraine outnumbers Russia in the theater. Ukraine has mobilized a large military at this point, close to a million combatants. Russia is outnumbered in the theater, and Ukraine is being reequipped with Western weapons, and Ukraine has fielded a better skilled, more proficient military. You expect a combatant like Ukraine to be able to grind out offensives and take ground. That doesn't mean there's going to be a sudden breakthrough and a collapse of the Russian position in Ukraine unless Russian morale breaks. That is very unlikely. To retake all the ground Ukraine owned is a project of years, not weeks.

Ryan Claffey:

Admiral James Stavridis who spoke previously on What Happens Next recently predicted that the Russians have a one in three chance of seizing Ukraine. He envisions a military operation where the Russians launch a simultaneous assault from the north and south, essentially flanking the Ukrainian forces and then traveling to Kyiv. Do you agree with this Stavridis' estimated probability?

Stephen Biddle:

This depends in part on whether Belarus enters the war. The Northern pincer would almost certainly have to be out of Belarus, and so far, the Belarusians sensibly enough, don't want to be part of this war. It's plausible that Lukashenko's government could fall if he did that. A double pincer envelopment of the East is asking a lot of Belarus.

The Russians so far have shown no ability to coordinate that kind of sweeping military offensive. This is a graduate level military operation that the admiral is talking about.

There's not a lot of evidence that the Russians have the command effectiveness to coordinate it adequately and carry it out. It also puts the Russians operating on external lines, and the Ukrainians are operating on internal lines. If the Ukrainians who outnumber the Russians in the theater have the ability to maneuver reserves, they could plausibly halt one pincer then turn to the other. It's a very demanding project. And we haven't seen a lot of evidence that Russia is capable of coordinating offensive efforts on that scale.

Ryan Claffey:

If the Russians start winning the war, will the US escalate by sending in US ground troops?

Stephen Biddle:

It's hard to imagine US ground forces being committed short of nuclear escalation by the Russians.

Ryan Claffey:

Can Russia expand the battlefield to threaten Western weapon supply lines to Ukraine?

Stephen Biddle:

The tyranny of distance is a big problem in logistics, and we are talking now about movements over huge distances. Ukraine is an enormous country, and Russia is not a military that's structured to logistically sustain long advances. They're heavily dependent on rail transport. And the kind of advances we're talking about now would require truck support beyond a railhead of literally hundreds of kilometers. Especially as Ukraine is armed with longer distance surface to surface missiles that have so far already, forced Russia to move its logistical depots and stockpiles further away so as to avoid having them be vulnerable to capabilities like HIMARS.

Ryan Claffey:

Is there sufficient support in the West to provide weapons indefinitely?

Stephen Biddle:

The Ukrainian's conventional defense is dependent on Western aid that depends on legislatures going along with this in multiple countries. The Republican Party is trending increasingly against support for Ukraine. One suspects that Putin's strategy for the war is mostly reliant on waiting this thing out until Republicans make continued US support impossible domestically. It's unclear whether the current House of Representatives would support another aid bill for Ukraine. If Republicans win in the 2024 presidential cycle, it is very hard to imagine the United States continuing to support Ukraine on this scale. If that happens, the military situation on the ground changes a lot as Ukraine burns through its munitions that is a very different military environment than the one we're looking at today. If I were Putin, I'd be playing for that.

Ryan Claffey:

What Happens Next if US military aid is cut back?

Stephen Biddle:

The implications for Ukraine would be very negative. Ukraine cannot sustain a conventional defense of the country without Western aid. They're burning through artillery ammunition at a rate that they'll never be able to sustain based on indigenous production. And artillery has been the most important casualty causer in this war, as it is in most wars.

If the Ukrainians lose the firepower to defend dug-in positions, eventually the Russians will push them out of them. You can't defend even a well-prepared position without ammunition.

Larry Bernstein:

What are the US domestic political issues related to the Ukraine war?

Stephen Biddle:

The political trends, especially among Republicans are clear. But there's a traditional conservative wing of the Republican Party led by Senate majority leader Mitch McConnell, that's actively trying to prevent the Republican Party from going wholesale isolationist anti-Ukraine. If I had to put money on an outcome, it

would be that McConnell's project will fail. But it's unknown where the Republican are going to go. If it succeeds, then McConnell and Biden will own the war.

The politics of this are up for grabs. I would like to see the President make a public address to the American people laying out the case for supporting Ukrainians.

One is the moral case for supporting an innocent democratic victim of naked cross-border aggression.

The second is prudential. Prior to Putin's invasion of Ukraine, he had engaged in successful military actions in Chechnya, Georgia, Crimea, and Syria. And that chain of successful military adventures had something to do with his decision to launch an invasion in Ukraine. Putin has expansionist objectives that include countries that the United States has a treaty obligation to defend.

Estonia, Latvia and Lithuania are NATO members who are part of the former Soviet Union and are clearly part of Vladimir Putin's ambitions for a reestablished Russian Empire.

Unlike Ukraine, which is not a treaty ally that we are obligated to defend, the next one could very well be. It's important that this kind of serial expansionism not continue, because pretty soon it will continue into places where if we decide to opt out as Donald Trump, Ron DeSantis, and some other populist Republicans would prefer, we will end up reneging on treaty obligations that will have profound global implications for US national security that go well beyond just Russia and Europe.

I think there is both a moral and a prudential case for the United States to support Ukraine but that case needs to be made in the public square.

Ryan Claffey:

What happens if Putin uses a nuclear weapon?

Stephen Biddle:

If Putin decides to use nuclear weapons, the natural target would be fixed military installations within Ukraine—air bases, supply dumps, training centers, and so on. Probably the weapon employed would be a burst at a fallout safe altitude. It would mostly be to signal to Ukraine and the United States that the stakes are high and growing, and that rather than risk New York City in a nuclear exchange with Russia, it would be better to play it safe to force Ukraine to the negotiating table.

If that happened, it's very unlikely that the United States would simply back down. The US response would probably be non-nuclear and it would probably not involve ground forces. The expectation is the United States would respond with massive air strikes against Russian infrastructure.

And the United States would then become a full co-belligerent in the war. Do we back down and lose, or do we Russians continue to escalate? And the usual expectation is that they would continue to escalate, that they would expand the target set, use more nuclear weapons. The Americans would then eventually be forced to respond with further escalation, which would eventually be nuclear. This is what gets you to New York and Moscow being destroyed in a massive nuclear release. The escalatory stakes for the United States are serious here. If this war isn't handled well by everybody involved, it could plausibly produce a nuclear exchange that could literally end humanity. This is a serious peril. And among the reasons why Americans should care about what happens here is that if Putin wins in Ukraine, the same scenario is going to repeat in a place where it would be harder for us to back down. If we back down, it will repeat in another place. It will be even harder for us to back down sooner or later. If Putin's agenda succeeds, the United States will get driven into this corner and that's dangerous.

Ryan Claffey:

What is Xi telling Putin?

Stephen Biddle:

My guess is that Xi is telling Putin do not use nuclear weapons. Xi would have preferred that Putin not invade in the first place. The Chinese would like a diplomatic solution to the war that does not look like defeat and failure for Russia but that doesn't blow up the world either, <laugh>.

Russia's interests and Xi's interests are not the same. Putin wants expansion. Xi does not, but Xi also does not want Russian humiliation and defeat.

My guess is that the outcome of this will be Chinese support for Russia as needed.

Ryan Claffey:

Would a diplomatic resolution include material territorial concessions by Ukraine?

Stephen Biddle:

The Chinese can propose clever territorial partitions of Ukraine, and it won't go anywhere because Ukrainians won't buy it. The last poll I've seen, which was back in June put Ukrainian opposition to territorial concessions of any kind at 89% is just off the charts in the polling biz. The odds that some clever Chinese proposal for limiting Russian gains gets any traction in Ukraine is about zero.

Ryan Claffey:

What will be the US response if China steps up military aid to Russia?

Stephen Biddle:

The ongoing deterioration in US-Chinese relations will be accelerated. The United States could sanction the Chinese for that assistance—that is a complicated process. Hostility to China plays well domestically in the United States right now. It is more tolerable among American allies in the Pacific than it would have been 10 years ago. Most American allies in the Pacific want better relations between the US and China and better bilateral relations between themselves and China because they need the Chinese market. So the degree to which the United States could get tough on China with sanctions that hurt China's other trading partners has limits because we need to maintain an alliance structure in the Pacific at the same time as we try and discourage the Chinese from supporting the Russians. There's a tightrope to be walked here, and I imagine the Biden administration's instincts is to try and do as much as they can to dissuade the Chinese from helping Russia.

Ryan Claffey:

Are American drones a game changer especially against the Russian tank?

Stephen Biddle:

This is just the latest iteration of “the tank is dead” argument. The use of cheap drones against tanks is greatly facilitated by the fact that modern most deployed air defenses are designed to deal with high performance threats rather than low performance threats. But that is a temporary situation.

The survival rate for drones in Ukrainian service is about 10% right now. The Russians lose even more than the Ukrainians do because air defenses are reorienting to dealing with the drone threat. And the most cost effective approach to dealing with inexpensive kamikaze drones is electronic warfare.

It's also increasingly the case that the tanks are armed with their own short range close in anti-missile defenses. The Israeli trophy systems already deployed on large numbers of US tanks. Systems of that kind typically use inexpensive short range sensor systems, typically millimeter wave radars to detect incoming assailants and direct counter fire against them to shoot down the incoming missile.

Tanks like anything else to be effective have to be part of a combined arms mix on the same battlefield to protect one another that will be necessary for tanks to survive. That combined arms mix will increasingly feature things that are designed to be very good against drones like escort jammers.

Larry Bernstein:

Will the US allow the Ukrainians to expand the war zone to include mainland Russia instead of just fighting and destroying Ukraine?

Stephen Biddle:

The Russians are being granted a sanctuary in metropolitan Russia largely because we want a sanctuary in Poland. If you expect the standard and escalatory dynamic to hold, then if we escalate, it's not likely to be the end of the game. What it does is confront the Russians with the decision of fail or escalate, which gives them an incentive to escalate. Given that escalation could end up in the destruction of humanity, the end of that process is full release of both sides' strategic nuclear arsenal. Fairness has nothing to do with it.

The right way to look at this is not, if it's fair for Russia to attack Kyiv, then it must be fair for Ukraine to attack Moscow. That is a sub optimization of this problem. <laugh>, The issues are bigger than Kyiv and Moscow, and the escalatory stakes here are high, and Russia is respecting a sanctuary too. It is just that sanctuary isn't Ukraine, it's Ukraine's supporters in the West. There has been escalation in the war already. Putin escalated when he ordered a partial mobilization. Putin escalated when he launched a strategic bombing campaign against Ukrainian civilian energy infrastructure.

So there's been a series of escalations on the Russian side. The West has escalated multiple times. We escalated when we started providing heavy artillery to the Ukrainians. We escalated when we then provided armored fighting vehicles to the Ukrainians. We escalated when we authorized Abrams tanks and Leopold 2s. So, both sides have already been walking up the escalatory ladder.

Russia has escalated at least four times, the three I mentioned and the original invasion. Herman Khan famously used the metaphor of a ladder with many rungs to understand escalation. And the first several of those rungs are conventional, not nuclear. The one at the top is full thermonuclear release.

The Biden administration is slowing the process down to give maximum time for domestic political pressure to act on Putin. And to avoid setting up a situation where Putin thinks that there will be an immediate coup d'état unless he escalates. So the Biden administration is walking up the escalatory ladder, but slowly and gradually to try and provide the maximum likelihood that Putin chooses not to go the next rung and instead back down. But there's plenty of escalation ongoing and there's lots of risk that it could go quite a bit further.

Ryan Claffey:

A bipartisan group of congressmen are encouraging Biden to provide Ukraine with some old F-16s. Is this a good idea?

Stephen Biddle:

I do agree with the president's decision. The problem is modern aerial warfare is a very complicated enterprise. Operating the systems in the airplane under pressure in a formation is where the rubber hits the road in training a fighter pilot. The electronics and the weapons systems in a modern aircraft are extraordinarily complicated.

And success and failure increasingly depend on simultaneously using all that equipment to its maximum potential in a high stress, time pressured environment. And coordinating your use of all those systems with other aircraft so that everybody is maximizing the performance of precision munitions, minimizing

communication and radar signatures, that's what's hard. It's not learning to use the stick and the throttle and getting the airplane off the ground. But if they're going to be used in a way that will be militarily consequential, it's learning to exploit the potential of the airplane with a bunch of other airplanes in a complicated tactical setting.

That's hard.

Ryan Claffey:

Will the M1 Abrams tank make a material difference in the battlefield?

Stephen Biddle:

In a modern Western military, the majority in uniform are not pulling triggers. They are repairing equipment, they are resupplying it with fuel and ammunition, they're doing engineering support. In the US military it typically takes roughly a half dozen tail personnel to support one trigger puller.

M1 Abrams will become non-usable in a week. The resupply parts suite required to keep a fleet of Abrams tanks running runs in excess of a thousand separate items.

The Abrams is famously logistics intensive. Partly that's because of design. The Abrams tank has a gas turbine engine. Most tanks use diesel engines. Gas turbines are way less fuel efficient. In exchange, they get better acceleration, but they have massive fuel requirements.

Part of the logistical chain you need to establish is mechanics who know how to repair an M1 as opposed to a T64 or a T72. If this is a multi-year war, the Ukrainians are going to have to be re-equipped with Western gear. There's just a finite amount of Russian equipment that people other than Russia are willing to make available. Sooner or later they must be re-equipped along the Western lines eventually.

The US had a strong preference that Leopard 2s be provided rather than Abrams is because the Leopard 2 had a different design philosophy behind it. The designers of the Leopard 2 were not prepared to make the kind of logistical investment that Americans were. And as a result, the Leo 2 has a diesel engine—it's less demanding of a fuel chain and it's easier to repair in the field. The Germans weren't willing to provide Leopard 2 unless someone else was also providing tanks.

When the Americans agreed to give Abrams to the Ukrainians, it was a token number of vehicles done in order to give the Germans cover so they would provide Leos.

Ryan Claffey:

How does this war end?

Stephen Biddle:

Historically hurting stalemates tend to be environments that produce compromised settlements, because when conditions in the battlefield are in flux, usually the side that's losing has an incentive to negotiate. And the side that's winning does not because they think they can continue to improve their bargaining position, and therefore they won't make concessions.

It would be preferable if we could get war termination prior to a multi-year hurting stalemate. That depends on Vladimir Putin. This choice to an unusual degree rests on one person. If Vlad is unwilling to negotiate, the war continues, nothing Ukraine, the United States, there's nothing anybody can do to end this war. Retaking every last square millimeter of Ukrainian ground doesn't end the war unless Putin decides to stop shooting. He can simply continue the strategic bombing campaign after Ukraine reaches the international border. The war will only end when Putin decides to end it.

But there are reasons to worry that it may be later rather than sooner.

Larry Bernstein:

What are you optimistic about in the Ukraine War?

Stephen Biddle:

I'm optimistic that if funded Ukraine will be able to preserve its independence and probably continue to gain ground. I think the worst plausible outcome if adequately supported is stalemate. The Ukrainians have outperformed everybody's expectations. And that's something that warrants celebration.

Larry Bernstein:

Thanks to Stephen Biddle for joining us today and our intern Ryan Claffey for putting this podcast together.

If you missed this week's shows, check it out.

Our guest was Dan Willingham who is a Professor of Cognitive Psychology at the University of Virginia. He is the author of the new book entitled *Outsmart Your Brain: Why Learning is Hard and How You Can Make It Easy*. Dan discussed strategies to improve the learning process as well as observations on current teaching methods.

You can find our previous episodes and transcripts on our website whathappensnextin6minutes.com. If you enjoyed today's podcast, please subscribe to our weekly emails, and follow us on Apple Podcasts or Spotify.

I would like to thank our audience for your continued engagement with these important issues, good-bye.