Scenarios for Ukraine
A Theory of Victory and Peace

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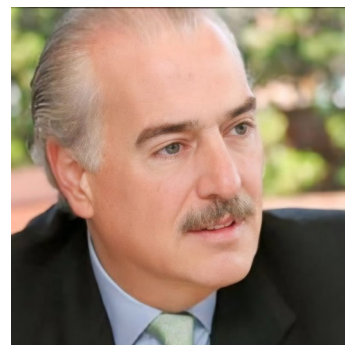
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All three are, with **David Kilcullen**, contributors to The Art of War and Peace. London: Bonnier Books, 2025. This paper is based in part on a trip to Ukraine by Dr Mills in May 2025, his tenth since the start of the full-scale invasion in February 2022.

Disclaimer: The opinions expressed in this report represent those of the authors and do not represent the opinion of the Centrum Balticum Foundation, and thus, the Centrum Balticum Foundation does not bear any responsibility for the opinions expressed in the report.

Abstract

At first glance, Vladimir Putin has the time advantage in his war with Ukraine: faster production, deeper manpower sources and pockets, no need for consultation and agreement from allies, and no meddlesome domestic opposition. From this point of view, he would prefer to keep the conflict going.

Currently three scenarios are imaginable in the conflict: A Continuation of Fighting; Division of Ukraine either along the lines of the peace in Korea or the division of Germany; or an Israeli option, by which Ukraine uses a temporary peace to rebuild its defensive and offensive military capacity, making itself an 'indigestible porcupine'.

The diplomacy aspect is critical to the outcome. If the US priority is to achieve a strategic reset with Russia with the economic and geopolitical opportunities that presents, Ukraine risks being the cuckolded partner in three-way relationship with the US and Russia. For Russia, the priority remains victory in Ukraine. Until these divergent aims are reconciled, peace for Ukraine will be elusive.

Putin's time advantage has limits. Diplomatically, he is never going to be in a better position than with the Trump administration in Washington. As time goes by, that advantage will erode. Plus, the European Union is slowly but surely gearing up. Conversely, President Volodymyr Zelenskyy could and should move in the opposite direction to Putin, and sue for peace.

Putin's position can be worsened by adroit Ukrainian positioning. Diplomatically, as much as Zelenskyy has managed to seize the moral high ground in being open to negotiations and to stage a recovery from the brink of (Oval Office) disaster, Putin increasingly looks the spoiler. Anything short of total victory is politically dangerous for Putin, as much as a united opposition is deadly to Russia's fortunes on the battlefield. His position could be worsened if Ukraine ensures an asymmetric technological advantage on the battlefield through the development of their domestic industry, especially around drones, coupled with the delivery of long-range missiles.

The common narrative is that Ukraine's security depends now on how Europe responds. In future, however, European security will increasingly be reliant on Ukraine, both as a shield and in creating a high-tech defence industrial capability, as much in software as hardware and the human interface that shifts the balance in warfare between hiding and finding.

On the wider narrative, outside of Europe, justice and courage ultimately have little truck with governments. As many Afghans and some Ukrainians will testify, people tire easily of supporting the weak. Power lies less in victimhood and perceptions of weakness than the creation of a strategic rationale for support.

Putin's worst nightmare, and that of authoritarians elsewhere, is to see a vibrant, free economy and society thriving in Ukraine. His appeal to authoritarians rests precisely on undoing the rules-based order and the alternative that his regime represents to democracy and its commitment to transparency and accountability. Ukraine's narrative for the Global South has in this light to be driven by empathy and agency: that it is fighting a war against colonialism, is a force for good over evil, is a global bell-weather for democracy and aims to put people first in politics.

Key words

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1. Introduction

EIGHTY YEARS AGO, the most costly war in human history ended, during which the rules of conflict were rewritten in an increasingly ruthless struggle, bringing mass destruction, widespread civilian casualties and systematic crimes against humanity.

Some 75 million people died in the Second World War, including about 25 million military personnel. Ukraine suffered an estimated eight million deaths, more than five million of which were civilians. This figure represented more than 40% of the total casualties of the Soviet Union. Ukraine lost more people in that war than any other European nation, adding to the estimated five million Ukrainians who starved to death under Stalin during the Holodomor famine engineered by the Soviet leader in the early 1930s.

Now, 35 years since the suggestion that we had reached the 'end of history' with the culmination of the Cold War and the apparent victory of democratic capitalism over authoritarian communism, history is back and moving fast.

Yet the war in Ukraine should not have come as a great shock. Vladimir Putin said in 2005 that the collapse of the Soviet empire was "the greatest geopolitical catastrophe of the century."[1] There were clear markers in his attempts to reinstate certain elements, including Russia's actions in Chechnya, in Georgia in 2008, and in seizing Crimea and parts of the Donbas in Ukraine's east in 2014.

Three questions stand out at this 80th anniversary, to which this paper turns:

* What are the lessons from the conflict starting in 2022 with Russia's full-scale invasion?

* What are the options for peace, temporary or permanent?

* Is there a theory of victory imaginable for Ukraine?

History, as Andrius Kubilius, the former Lithuanian prime minister and the first EU Defence and Space Commissioner, reminds is however not only important for the sake of maintaining memories, but also to learn lessons to avoid repeating its tragic mistakes.[2]

2. Lessons from War

"The history of war, I came to realise," writes Professor Michael Howard, "was more than the operational history of armed forces. It was the study of entire societies. Only by studying their cultures could one come to understand what it was that they fought about and why they fought in the way that they did."[3] Howard emphasises the visceral, frictional and brutal aspects of war. Wars, he argued, share fundamental and unchanging characteristics that make them resemble each other more than other human activities. As he writes, "after all allowances have been made for historical differences, wars still resemble each other more than they resemble any other human activity".

History, he noted, does not teach lessons; historians do, some wisely, some less so. This requires a constant evaluation of our understanding of past events, permitting the emergence of *patterns* of structure and process in human interactions, from groupthink to the pursuit of narrower personal ambition. History also provides examples of moral dilemmas in decision-making, though the purpose of future-gazing in war, he observed, is seldom to get it right, but to avoid getting it terribly wrong in selecting the least bad option.

What are the recurrent patterns and questions from the war in Ukraine which might help make better decisions about the future?

3. Strategic Lessons

By 8 May 2025, in a war that many expected would last for just a week, but had been underway for 1170 days, Russia had sacrificed more than 700,000 of its people, killed and wounded, and had failed to achieve its strategic objective to turn Ukraine into an effective Russian colony. By that measure alone, Russia has lost and Ukraine has won. But it was not over, and the costs had escalated. By the date of the 2025 anniversary, Ukraine has suffered more than 440,000 casualties, including 46,000 dead soldiers and 12,000 civilians, plus nearly 20,000 children who had been forcibly removed to Russia.[4]

On 24 February 2022, Russia launched a 'decapitation' assault on Kyiv, which was slowed at Hostomel and stopped on the outskirts of the city. In an action that became known as the Battle of Antonov Airport,[5] led by Spetsnaz and VDV (*Vozdushno-desantnye voyska Rossii*), the airborne troops that form a separate service within Russia's armed forces, the initial heliborne assault was disrupted by a group of 90 National Guard forces based at the cargo airport, mostly conscripts, which bought time for other forces including special forces and regular soldiers from 72 Brigade to arrive. Using two ZU-23-2 anti-aircraft guns, the unit claimed the destruction of five Kamov Ka-52 helicopters and one Mil Mi-8, blocking the runway with vehicles and the downed aircraft. The delay forced the orbiting Russian Ilyushin-76 transports, each carrying hundreds of VDV troops, to retreat and land back at their airfields of origin in Belarus. Russian forces took 80 casualties; the National Guard unit just one injured.

The failure to seize Hostomel derailed the assault plan, causing the armoured column from Belarus that was supposed to link up with the VDV forces to stall, and blunting the Russian attack. It gave time for the Ukrainians to blow three bridges across the river Dnieper at Irpin and Bucha on the outskirts of Kyiv, and to flood the area, further slowing the Russian advance into the capital and ending any chance of a rapid Russian victory. Other attempts to approach Kyiv from the north, in the process encircling Chernihiv, similarly failed with small Ukrainian units blocking the Russian sweep between the villages astride the road to Nizhyn south of the city lying 120 km north of Kyiv.

The collapse in Afghanistan and, so soon after, the invasion of Ukraine and the unexpected resistance remind us, as Howard might have put it, that we are part of a system of eternal change, still more rapid in the digital age. War has its logic and peculiar character, of frictions and fog, in which the enemy also had a vote. Absent a clear strategy, a theory of victory, the war has incrementally escalated with no end in sight.

Three years on, Russia is reminded of these dynamics. Moscow is not winning, and Ukraine is still not losing. In that regard, the strategic victory is, for now, Ukraine's, though how the peace talks proceed and how Kyiv uses any pause in the conflict, will determine not only how the war ends, but in what shape and condition Ukraine emerges.

In the wake of the collapse of the government in Afghanistan in August 2021, few had given Kyiv much hope in the face of the full-scale Russian invasion, hence the offer to President to extract him from the capital and his reported retort: 'The fight is here; I need ammunition, not a ride.'[6] The longer Ukraine defended the more it crowded in support from democracies. Paradoxically, the ferocity of the Ukrainian defence transformed the war into a contest of strength and size rather than speed – a war of attrition – which Ukraine, many times smaller than Russia, is at least on paper ill-equipped to win.

In mounting his resistance, Zelenskyy has challenged the notion of fixed spheres of influence. He has in the process shown that democracy – expressed as the right to determine your future – matters as much as geostrategic interests and constraints.

Another lesson of the war since February 2022 is that raw power is back – *si vis pacem para bellum*[7] – in supplanting international law as the organising principle of the international system. There are, however, few successors in sight to the rules-based order. In these circumstances there is invariably a shift towards the local neighbourhood, to work with friends and isolate rivals, adjusting and integrating accordingly according to the principle of variable geometry.

For the West, the significant lesson lies in the strategic folly of not providing Ukraine enough and fast enough to win. Western assistance to Ukraine has been equivalent to around 0.1% of GDP, where European members of NATO spend an average of 2% of GDP on defence, and the US 3.4%. For all of the rhetoric in support of Ukraine, and the evident self-interest in so doing, a healthy scepticism about Western promises is sensible, based as it is on a yawning delivery credibility gap, self-interest and the fickleness of democratic systems.

The problem with the parsimony underpinning this strategic view, as the former Ukrainian foreign minister Dmytro Kuleba has argued, is that 'If you make Ukraine win, but Russia doesn't lose, what you get is revanchism.' Russia in his view would immediately undertake another attempt to reach all the goals of its 2022 'the special military operation'.[8]

There are other lessons, including the folly of trusting Russia even when committing (remember the 1994 Budapest Memorandum, for instance, by which Russia undertook to respect Ukrainian sovereignty in exchange for Kyiv giving up on nuclear weapons) as much as Moscow flights impossible conditions as a spoiling tactic in negotiations.

Russia's war in Ukraine has also reminded us that war on this scale is about economic as much as military power and health. The strategic tools therefore include isolation and sanctions, even if this aspect has yet to be fully explored and applied, if ever it might be, since to be effective it would have to be applied on secondary markets including China and India, and aim to drive down the price of oil and gas which feeds Putin's war machine. Such effectiveness reflects political (and economic) will, and the related willingness to confront powerful commercial interests. The use of sanctions also emphasises a deficit in strategic patience, another consistent lesson of war.

Russia has succeeded in forcing Ukraine to fight a battle of attrition in which it has every advantage, not least industrial advantage, in part because it does not feel the same pressures as a democratic society. Hence the formulation of a rule quite different to Tom Freidman's 'Golden Arches' thesis of conflict:[9] that no two countries where both have a McDonalds – and thus have reached a level of economic development where they possess a middle class strong enough to host a McDonald's network – would fight against each other. This has been well and truly exploded. There is in its place a different thesis; that the options whereby war is prosecuted in democratic countries are quite different to the options available to authoritarians. By definition, in democracies it has to be shorter, with fewer casualties and less cost in blood and treasure.

This hints at a related realisation that perhaps not everyone wants to be like America. It's a lazily optimistic foreign-policy outlook, a product of the 1990s when ideological struggles appeared to have been resolved in favour of American-led capitalism. The war has also dented the notion that economic globalisation by itself can make war less likely, instead highlighting how colonial and imperial legacies, resources and personalities can contribute to a new wave of conflict.

There are other 'known knowns' from this war. It has, as expected, involved a battle of online narratives. However cheap it may be to extend reach, however, digital does not mean free. Fighting on this front demands dedicating considerable resources. Contending with the Russian narrative, given Moscow's comparative strengths, including a range of news outlets and paid personal propagandists, is a formidable challenge.

AI has transformed the media battlespace just as it is shaping the military struggle. The Russian ability to reach both domestic Ukrainian and international audiences and amplify messages has been greatly enhanced by digital tools. "It has taught us how quickly people forget," says one analyst at the Centre for Countering Disinformation in Kyiv, "how international law does not protect you but you have to protect yourself, and how gullible people are, seldom investigating further and checking the facts."

In presenting the invasion of Ukraine, the Russians have followed a line defined by simplicity and repetition. To an extent this has worked if Russia's political support is any measure. The Russian narrative centres on a view that Ukraine started the war by moving towards NATO and the West, that Ukraine is a 'non-country', lacking national identity, full of Nazis, a borderland, and a NATO proxy. In this thesis, the Russian invasion is an attempt to forestall further NATO expansion.

Russian tactics and messaging continues to evolve. Ukrainian analysts now see Moscow's messaging attempting to influence international audiences by way of seeding doubt and discord among Ukrainians. This takes grains of truth – economic challenges for instance – and amplifies them employing Ukrainian voices. The main means of distribution have shifted to western channels, especially X and TikTok, with a change in content emphasis too in wooing audiences with perceptions of strength, the sexualisation of women and Christian values as key themes, "stressing emotion over reason" as one Ukrainian analyst has put it.

Putin's overall approach has been to take advantage of what he perceives as weak or chaotic leadership – the handling of the withdrawal from Afghanistan in 2021 could only have encouraged him in Ukraine – while he has been willing, too, to double down rather than accept defeat on the battlefield. "There are always a lot of mistakes made in war. That's inevitable. But when you are fighting, if you keep thinking everyone around you is always making mistakes, you'll never win," says Putin in the biographical *First Person*. "You have to take a pragmatic attitude. And you have to keep thinking of victory."[10] The evidence of the capabilities of Russian forces suggests that Putin relies on indecision and a lack of Western resolve more than he relies on clear strategy and the prowess of his armed forces in achieving his aim to bring Ukraine under Russian control.

From the outside, Ukraine's strategic narrative has not been dissimilar to that of the Republicans in the Spanish Civil War: one of outrage, which appeals to certain audiences, mostly in the West. This is invariably a short-term rather than strategic play. Strength is a much more attractive quality, at least for leaders, whereas weakness appeals more to populations. Kyiv's inevitable focus on the West has contributed to 'losing' audiences in the Global South, compounded by both the attractiveness of the Putin 'strongman' leadership model to some and the successful manner in which Moscow has been the inheritor of the goodwill generated by the Soviet Union's support for liberation struggles in Africa and Asia in particular.

Ukraine's message of human rights and liberal democracy (if less liberal governance) also lacks resonance among a world suspicious of the West, and where democracy is under pressure. Freedom House reported this February on the 19th straight year in 'global freedom decline'. Political rights and civil liberties deteriorated in 60 countries, and only 34 countries reported improvements in freedom. Among the 66 national elections held world-wide in 2024, 40% experienced political violence. While the majority (106) of 195 countries world-wide are classified as electoral democracies, this was, too, a decline from 110 the previous year.[11] Undermining democracy is in the interests of authoritarians, not least since it offers democracies an asymmetric strategic advantage.

Authoritarians have also proven adept at sticking together and stoking the forces of illiberalism, in Europe, but also farther afield in Africa and Latin America. Their enthusiasm is apparently waxing, as evidenced by Xi Jinping's visit to Moscow to celebrate Putin's production of the 80th anniversary of the end of the Second World War and the creation of the 'Friends of Steel' pact, undergirded by the sale of Russian energy and the supply of materiel to Russia by this authoritarian axis including Iran and North Korea. Two-thirds of Russian machine-tools and 90% of chips are reportedly acquired from China. And this includes the deployment of around 12,000 North Korean troops and some 5,000 Cuban volunteers.[12]

Paradoxically, China is profiting even from Ukraine's war, in supplying, for example, around 50% of the components used in drone manufacture, despite attempts to wean the industry off these parts. That it will, inevitably, play a part in a peace process, whether through a peacekeeping role or diplomatic pressure, makes it probably the only 'win-win' case in a war that is estimated to have, as of the end of 2024, cost Ukraine $170 billion in damaged infrastructure,[13] and in the three years of the war, the West €267 billion in financial (€118 billion), humanitarian (€19 billion) and military (€130 billion) support.[14]

"Putin is now in a strategic marriage with China, on which he is completely dependent" says Viktor Yushchenko, the Ukrainian president who led the Orange Revolution in 2004, signalling a break from the Soviet past and Russian control. "Ukraine is fighting a war against Russia, while Russia is fighting a geopolitical war against democracy. We are," he notes, "Europe's body armour."[15] An independent Ukrainian democracy supported by Europe remains a danger to Putin, and what he wants to achieve at home, as much as his authoritarian allies provide him with the means to impose his geo-political will.

The extent to which European defence now centres on Ukraine's survival and integrity, as Yushchenko posits, is another strategic insight, even though European diplomacy is, in the short-term, primarily geared to maintaining Washington's involvement. The inability of Europe, which spends 2.5 times Russia's defence budget, to enable alone Ukraine's fight for survival, is moot. This imperative is recognised by many, including the European Commission. "The future of Europe today depends on Ukraine. Because today, three years later, we still hear echoes of the past," says former Prime Minister Kubilius. "We need to remember that today and the future of history is made in Ukraine."[16] Keeping Washington on board reduces the pressure for European mobilisation and defence transformation, but that agenda remains pressing, not least since the election of a second Trump administration suggests a longer-term trend in American politics.

More than anything, Ukraine's response matters, diplomatically, economically, and militarily, whether this be to calls for peace, developing common perceptions of order and systems of defence, or in bringing America back closer to Europe and luring in other actors including China and India as partners to the peace. The centrality of Ukrainian agency in this struggle reminds, as ever, that outsiders can only reinforce the intent of insiders.

4. Operational Lessons

The ubiquity and utility of drones, the return of electronic warfare at scale, the concomitant difficulty of achieving precision in a heavily contested digital battlefield, the centrality of protection and the resource bill that comes with it, and the need for 'cheap mass' to cope with a war that may well be long and resource intensive, are among the many operational lessons from the last three years.

"This war has changed," says Captain Viacheslav Shutenko, Commander of the Unmanned Systems Battalion in Ukraine's 44th Mechanised Brigade. "In 2022 this war was … more or less classical. But, in three and a plus years," he observed in May 2025, "this war is about technology, this war about precision, and this war is about speed. Unmanned systems are no longer an auxiliary. They are decisive on the battlefield. This is why to win Ukraine needs more drones… .."

Necessity has been the mother of invention. Driven by a shortage of artillery ammunition, Ukraine's survival instinct and "horizontal interaction" between frontline units and the engineers back in Kyiv and other cities, Ukrainian production is around 100,000 drones per month. Now seven of ten battlefield Russian casualties are caused by drones, a shift in technology which helps to offset Russia's numerical population advantage. "We all have friends and relatives at the frontline," says Sasha, a leader of a youthful team (average age 22) of engineers. "They tell us all the time what works and what they need."

Overall, however, this is not a war about hardware, or even, indeed, predominantly so. War has always been a competition, notes General Sir Nick Carter, the former head of the British armed forces, "between hiding and finding". Now, with advances in electronic warfare, finding is ruling supreme over hiding, both on the ground and in the air. This is an outcome of fast-developing hardware, of course, but more importantly of the efficacy of its interface with trained people and software. The advantage now rests on achieving and sustaining relative superiority in the accuracy and speed of the decision-making cycle.

At the same time, Ukraine realises that it still requires well-trained and motivated infantry to repel Russian attacks, and assault capabilities "to perform effective offensive operations" to win its occupied territories back. To do so, there is a need to scale and transfer the "best combat experience, best technologies and best tactics" across units. All this requires "continuous international support" – not only for equipment, but support for diplomacy to isolate Russia through sanctions. "We need all this stuff … because here in Ukraine we fight against one of the most powerful armies in the world, and we fight not only for our independence and fight not only for our territorial integrity, but we fight for the free world, for democracy, European values and international security," says Shutenko.

The West has, since 1945, sought to create militaries and support assumptions that favour manoeuvre over attrition. There are sound political and societal reasons for so doing. In manoeuvre warfare victory can be achieved quickly, at relative minimal cost to the wider state. Yet the current Ukraine war has shown us that attrition in 1914-18 style still has a place in warfare and, as foreseen, places huge demands on the state and the population. It is almost certainly to the advantage of autocratic regimes to grind it out in this way, not least given the limits of industrial capacity in the West, but also given the political constraints, as highlighted above, of operating in a democracy.

Yet the art of war is not lost completely. The failure to employ fully this aspect may have cost Ukraine dearly in the 2023 counter-offensive. Rather than drawing and funnelling the Russians on through careful defensive measures, and then counter-attacking, much of the Ukrainian treasure was ground away against layered Russian defences.

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There is ongoing discussion about the imminence of peace. This reminds to guard against the 'credibility gap': between what you would you like to see and the facts on the ground. With this in mind, how might peace conceivably be established in the short- to medium-term?

5. A Theory of Peace

Strategy, as a "theory of victory", as Professor Howard put it, has to be based on war's nature, rather than ambitious aims or predictions, with the ability to adjust as its emergent character becomes apparent.

In Ukraine a theory of victory centres on drawing in others in Ukraine's support, giving them a stake in success, and creating the means and economy to sustain this approach.

There is a presumption that Putin will accept a permanent peace on the grounds of the conquests that he has already made in the East and in Crimea. This view overlooks that "this is not a war about territory," explains Dr Gregory Nemyria, the vice chair of the Rada's Foreign Affairs Committee, "rather one about values, and questions and perceptions of security." Occupying over 17 million km^2, Russia is nearly twice as the world's next largest country, Canada, covering 11 time zones and with one of the lowest population densities, ranking 225 of 242 countries and territories, in the company of the Central African Republic and Kazakhstan. Russia's theory of victory is not about territory, says former president Yushchenko, "but all about advancing the Russian world."

The conditions for a permanent peace seem uncertain while Putin remains in place in Moscow, a man who has pinned his honour on the re-establishment of the Russian empire, a project in which Ukraine is key. Whatever might be agreed at talks will almost certainly be used as an opportunity for Russia to pause and reconstitute for another go. Peace may even be a sly pretext to force Zelenskyy to permit elections, during which a mammoth Russian influence operation would attempt to produce another victor.

"As Prime Minister," says Yulia Tymoshenko, "Putin was my opposite number. One should not," she says, "trust him in anything. If and when negotiations should start, he will twist and turn to insert conditions which are not compatible with peace." Her bcoss, Yushchenko, who was poisoned during the Orange Revolution, is blunt in his assessment of the former KGB officer. "Putin is a small man. He was raised by the KGB to understand that you don't have to be the strongest, but you have to be sneaky and ruthless to survive. My personal experience in dealing with him is that he is very polite and respectful, but always looking for weaknesses in finding the right way and striking the right tone to get what he wants."[17]

If Ukraine wants a peace that's not a Russian victory, it will have to keep the US engaged and broadly onside, whatever the volatility of that relationship. That means that Kyiv will need to hold its nose and engage constructively with an administration that previous partners have learnt not to trust, hoping that Washington both stays the course and imposes more pressure on Russia over time, not least through the US-Ukraine mineral deal now concluded. And of course, US support matters at the military level too; while Europe could probably manage (after a delay) to replenish stocks and equipment, the intelligence support Ukraine receives from the US is fundamental to their success and very difficult for Europe to replicate in the short term.

Given the high risks that any peace with Putin would be temporary, Ukraine has to, first, set the terms for a ceasefire or armistice as favourably as possible; and, second, use that period of peace, however long it may endure, better than Russia. In this environment, three scenarios are imaginable:

Give War a Chance: Edward Luttwak, the American strategist and author, in 1999 coined the term "give war a chance" in describing the limits of international diplomacy and peacekeeping options where the underlying issues were unresolved.[18] As he wrote, 'although war is a great evil, it does have a great virtue: it can resolve political conflicts and lead to peace. This can happen when all belligerents become exhausted or when one wins decisively. Either way, the key is that the fighting must continue until a resolution is reached. War brings peace only after passing a culminating phase of violence."

While this option exists, of course, and some Ukrainians (and probably many Russians) might prefer this strategy, it will require an appetite for casualties and a willingness to continue to support the war's voracious costs. This will also require escalating Western support for Ukraine in a way that removes control from Moscow through giving Kyiv the equipment it needs and removing caveats on its use. However, with wavering support from the United States and a lack of capacity, for now, among European allies to match abundant rhetorical support with what the Ukrainians require, this option appears far-fetched as a path to victory. The demographic challenge faced by Ukraine in an attritional war is another consideration.

Peace and Division. There are two sub-options in this regard:

- First, *the Korean model*, which could involve an armistice like that signed between South Korea/United Nations/US and North Korea/China in July 1953. Ukraine gets, under this option, to keep its territorial claims intact, freeing up capacity for economic, technological and military improvement. Much like South Korea, Ukraine would play the long game, and wait for a change in conditions, such as territorial negotiation with a post-Putin Russia to allow it to claim some land back. It would need

backing, just as South Korea had the security of US nuclear weapons and a permanent American troop presence. This option of course presumes that Putin would stick to the armistice to allow this to happen, and not simply use the peace to regroup, rearm and try again. If so, this reverts to the Israel Option, as below.

• Second, *the German Option:* This would involve a ceasefire and a long period of division with the aim of eventual reunification, with multi-generational pressure being applied on the Russians through Ukraine's and the West's relative economic success along with rebuilding its defences. In both this and the Korea Option, there is a peacekeeping force (preferably including Chinese and Indian observers). Diplomatically, in this scenario, Ukraine pushes for big Western investment to offer a stake in security, and accession to the EU (which implies a formal guarantees automatically) but probably not NATO. Russia should accept that in the terms of ceasefire agreement. At the UN level, it would be necessary to keep alive the reality through General Assembly resolutions that these are occupied territories, that Russia is the occupying and administration power, that there has been population replacement and expulsion (which excludes sovereignty through self-determination referenda), and be ready to wait for decades. There is a major difference between Ukraine 2025 and Germany circa 1945, of course, in that Ukraine is the victim rather than the perpetrator, and Ukraine has not surrendered. However, this option recognises the facts on the ground as they are rather than the political logic as to how they should be.

The Israeli Option: A shorter-term affair, using the pause around a ceasefire to rapidly build-up Ukrainian defences and a long-range strike capability, while retraining the army for the inevitable second round of the full-scale invasion. Like Israel, which has few friends but ultimately takes none of its defensive needs for granted, Ukraine would have to strengthen the international partnerships that enable its military power. The risk of that parallel is it breeds an exceptionalism that starts to preclude mainstream membership of collective bodies, which Ukraine has to guard against. This approach centres on buying time, not recasting national identity. It would, as with the Korean and German options, recognise the facts on the ground with respect to the occupied territories, the difference being that it would be rearming to seize them. It suits Kyiv to make a virtue from a necessity in not getting back the Donbas in the current scenario, no matter how politically costly this may be for its leadership. Placating a disaffected Russian population there and the cost of rebuilding cost would invariably detract from Ukraine's defence preparedness.

In essence, this option allows Ukraine to keep its claims, puts the onus on Putin to stick to his bargain, and the space for Kyiv to get back on its feet militarily and economically. A strategic approach to positively employing this pause is outlined below.

6.   The Indigestible Porcupine

Three years ago, military drones were thought of as fixed-wing stand-off weapons. Products such as the Turkish Bayraktar and American Predator were the market leaders. Today, they are dinosaurs, comparatively easy prey for Russian air defences given their heat-signature. "They are fine for game viewing, or fighting people who are not fighting back," laughs one Ukrainian drone operator, a kin known for their grunge appearance as much as their skills.

Drones are now the great equaliser in Ukraine's defence, a cost-effective way of making up the deficit in manpower, materiel and financing. Whereas 155mm artillery rounds cost as much as $7,000 each, and a Javelin anti-tank missile $250,000, Ukrainian FPV (first person view) kamikaze drones a churned out at less than $500 apiece. With a range of the smaller drone of up to 30kms with a 4kg payload, this has effectively shrunk the 1200km frontline. With a team of just three, and mission times around 15 minutes, drones can be continuously cycled. "The frontline is now a ten kilometre 'grey zone,'" says a partner at SkyRiper, Anton, who heads a 70-strong team producing 10,000 drones a month at several sites around Kyiv. "It's a no-go area over which drones dominate." Most armour – requiring sometimes as many as 10 drone hits – is knocked out usually on the way to this no-man's land.

While it makes great headlines, there is less technological focus on 'swarming' than last mile targeting, avoiding Russian efforts to jam signals (in part by increasingly employing fibre-optic technology), and focusing on improved lethality and manoeuvrability. "The drones have to be capable of going into the forests, ducking under netting, looking for the weak spots in armoured vehicles," says Anton. Citing Marx in balancing sophistication and cost, he observes that "In drone warfare, quantity has a quality. Its better to have 100 drones than 10 which can swarm."

Russia's war in Ukraine he believes will be won by "the calculator and the hands – by the cost and utility of equipment".

While it undergoes its own domestic arms revolution, Ukraine will simultaneously have to learn to splice itself into the practical defence of Europe: air and maritime, especially, as these domains disdain borders. Kyiv will have to get itself onto the accounting book, even if it isn't formally part of NATO, as Finland and Sweden did well in the 1980s. What follows is interoperability; where national defence plans are 'deconflicted' with (that is, integrated into) NATO war plans.

In the process, Ukraine has the opportunity to become a source of capability, not a market for it, to develop the most potent defence sector in Europe, fuelling its own coffers, providing deterrence capability and buttressing European combat power. The West's lack of industrial capacity makes it vulnerable to the world's 'producers' including China. Ukraine shows how even poor and weak economies with relatively low industrial production outputs and standards can produce 21st century weapons at scale. This would demand more international capital investment, which means releasing the fetters on various controls. While there is a risk of acquisitions, and compromise and the transfer of IP, but the exchange then becomes another tether to the Western system.

Kyiv will also certainly need to improve its record on corruption. At the tactical and operational level, the Ukrainians will need to ensure that their defensive lines are fully developed and that they sustain an armed force sufficient to deter Russia. In slower time, Ukraine's armed forces would have to sort out their Command and Control, which has proven a weak spot, and bring clarity and cohesion to the way that the various 'domains' work together.

In terms of turning lessons into actions, for defence in this situation, a realistic defence strategy for Ukraine can be summarised by what General Carter describes as an "indigestible porcupine". This includes the development of capabilities to hit the enemy throughout their depth. Warfare is "going long" to use the parlance of American football. This starts with a need to build physical defences of the sort that frustrated Ukraine in its counter-offensive in 2023. The Russian advances of February 2022 would never have been possible if they'd existed. Militarily, just as Field Marshal Bill Slim drew in the Japanese 15th Army, and eventually destroyed it almost in its entirety in 1944-45, Ukraine would similarly aim to turn its current predicament into victory.

This requires developing (and then protecting) training capability. Ukraine has used up it reservoir of instructors, not least in the 2023 counter-offensive. It will need to create a meaningful reserve through continued international collaboration, which is, in turn, a means for closer regional defence integration.

Since deterrence depends on both capabilities and the willingness to use them (or at least the perception thereof), peace will depend on derestricting Western assistance, not only in terms of weapons flows, but the freeing up of use caveats, the provision of targeting intelligence, and even with nuclear guarantees.

In the earlier stages of the war, the acquisition of the F-16 Fighting Falcon was supposed to change the battlefield in Ukraine's favour. That debate has dissipated. While *wunderwaffe* don't really exist, and the conventional environment will depend a getting a formula of hardware, software and people right, there probably has to be a plan to build or at least acquire the assured protection of nuclear weapons. Sometime in the next decade, Ukraine will likely need them as a deterrent, or at least to create strategic ambiguity around their procurement or possession.

As with South Korea, this aspect could form part of the global strategic guarantee, though Ukrainian scepticism would require some massaging.

7.   Conclusion: Time and Narrative

"We lack time," says Sasha, the drone engineer who also serves as an officer in the Ukrainian reserves. "We have 15,000 to 20,000 drones on the frontline at any time. But the Russians have perhaps three times this number, even though their effectiveness is about 40% of each mission, half as good as we manage."

At first glance, Vladimir Putin has the time advantage: faster production, deeper manpower sources and pockets, no need for consultation and agreement from allies, and no meddlesome domestic opposition. From this point of view, he would prefer to keep the conflict going.

If the US priority is to achieve a strategic reset with Russia with the economic and geopolitical opportunities that presents, Ukraine risks being the cuckolded partner in three-way relationship with the US and Russia. For Russia, the priority remains victory in Ukraine. Until these divergent aims are reconciled, peace for Ukraine will be elusive.

But Putin's time advantage has limits. Diplomatically, he is never going to be in a better position than with Trump in Washington. As time goes by, that advantage erodes. Plus, the EU is slowly but surely gearing up. Conversely, Zelenskyy could and should move in the opposite direction to Putin, and sue for peace.

Putin's position can be worsened by adroit Ukrainian positioning. Diplomatically, as much as Zelenskyy has managed to seize the moral high ground in being open to negotiations and to stage a recovery from the brink of (Oval Office) disaster, Putin increasingly looks the spoiler. He has made Trump look bad, because the US president was unable to deliver on his promise for peace in a couple of weeks. Perhaps this is because Putin has less room for manoeuvre than commonly assumed. Anything short of total victory is politically dangerous for him, as much as a united opposition is deadly to Russia's fortunes on the battlefield. His position could be worsened if Ukraine ensures an asymmetric technological advantage on the battlefield through his domestic industry coupled with the delivery of long-range missiles.

On the wider narrative, outside of Europe, justice and courage ultimately have little truck with governments. As many Afghans and some Ukrainians will testify, people tire easily of supporting the weak. Sovereignty remains a strategic play and strength its bedfellow.

There is a parallel again with the plight of Israel. It moved from being a weak state, with sympathy for the Zionist cause as a result of the Holocaust. "If we have to have a choice between dead and pitied," the Israeli leader Golda Meir observed, "and being alive with a bad image, we'd rather be alive and have the bad image."

"Whatever the end of this war is going to be, we have to become Israel," says Yulia Tymoshenko, who served as prime minister under Yushchenko. "To defend ourselves, we have to rely on ourselves. This is going to be a very expensive strategy."

Born as Golda Mabovitch in downtown Kyiv, facing persecution and pogroms, Meir's family emigrated to the US in search of better times. With five million Ukrainians having left since 2022, coupled with the number of casualties, there is a demographic crisis, affecting resilience. But this will not be solved simply by lowering the recruitment age. "Mobilising without weapons will not," says one EU diplomat in Kyiv, "achieve any objectives."

Today Israel is strong, and empathy has dried up, both because of its actions but also because it is no longer weak. 'What would be the price of being weak?' asks one senior Israeli diplomat, "because you cannot live on sympathy alone."

Governance which seeks to apply political agency rather than entrench perceptions of victimhood is an attractive partner for any marriage. Power lies less in victimhood and perceptions of weakness than the creation of a strategic rationale for support. At the same time, it should implicitly pose the question: What would happen if Russia was to defeat Ukraine? For one, it would reinforce the view that democrats comprise a team of losers.

Putin's worst nightmare, and that of authoritarians elsewhere, is to see a vibrant, free economy and society thriving in Ukraine. His appeal to authoritarians rests precisely on undoing the rules-based order and the alternative that his regime represents to democracy and its commitment to transparency and accountability. Ukraine's narrative for the Global South has in this light to be driven by empathy and agency: that it is fighting a war against colonialism, is a force for good over evil, is a global bell-weather for democracy and aims to put people first in politics.

Endnotes

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4   At https://www.pravda.com.ua/eng/news/2025/02/16/7498632/.

5   This is based on a field trip to the airfield on 12 May 2025, including interviewing the commander and deputy commander of the National Guard Unit stationed there on 24 February 2022. See also https://warontherocks.com/2023/08/the-battle-of-hostomel-airport-a-key-moment-in-russias-defeat-in-kyiv/.

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17   Interviews, Kyiv, 13 May 2025.

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