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## What's Next for Russia – First Take

[Marek Czajkowski](#)

Any attempt to fathom the changes that are likely to occur in the world due to the Russian incursion into Ukraine, which started on February 24<sup>th</sup>, 2022, seems like reading tea leaves at the moment (April 1<sup>st</sup>, 2022). The war itself is far from over, its result remains uncertain, despite the ongoing negotiation process. Moreover, the world has been shaken by unpredictable developments like financial turmoil, hikes in energy prices, and a looming food crisis. In addition, many countries frantically seek new policies and strategies, attempting to position themselves in the rapidly changing realities. Thus, the future seems at least uncertain, if not chaotic, what makes any forecast extremely challenging.

The following argument does not pretend to be a convincing case for or against any possible scenario. It also does not depict what we believe would happen because we frankly do not know that. It is merely an exercise exploring some possible developments and their likely consequences. Most importantly, we would like to point out what factors will shape Russia's place in the world after the current hostilities cease. This way, despite difficulties, we believe that it is not a futile effort to try to assess what is coming next and what would be an immediate and long-term outcome of the war.

## The End of Hostilities – A General Assessment

We certainly do not know how the war will end because there are so many variables regarding the situation on the ground in Ukraine and the political developments in Kyiv, Moscow or elsewhere. The reliable information is scarce and imprecise, even if abundant. Warring nations' intentions and remaining capabilities are also not exactly known as they also change over time. Therefore, for the sake of a further analysis, we will make a guesstimate of what the outcome of the current phase of hostilities would be. We will not provide a detailed argument of how we have come to the following assumption because it would constitute a lengthy article by itself, what is not the purpose of this commentary.

Thus, in our opinion, the present phase of the conflict will end within several weeks. The Russians will take Mariupol and consolidate their positions in the south and east of Ukraine, but they will not be able to conquer the whole of Luhansk and Donetsk oblasts, which [apparently](#) has become Moscow's current aim. The Russian military will not advance much on the other fronts; it is even likely to be expelled or withdrawn from some currently held positions. The cessation of hostilities will happen, for the most part, due to the [exhaustion](#) of the Russian land forces, which have already suffered [losses](#) that amount to military defeat.

Furthermore, we believe that warring parties will not manage to agree upon a peace deal that would pass for a lasting solution. Only the truce will be declared with some technical arrangements referring to POWs exchange, further negotiations on Ukraine's neutrality and other sensitive political issues. Certainly, Russia will declare its total victory, claiming that the military potential of Ukraine has been destroyed and the safety of the breakaway Luhansk and Donetsk Republics ensured. It is also likely that similar republics will be formed in the parts of the Kherson and Zaporozhe regions. In the more distant future, it is also possible that all these entities will be incorporated into Russia.

The abovementioned Kremlin's declaration will be clearly a face-saving operation aimed at public opinion at home. Ukraine will not be disarmed; on the contrary, it will retain most of its combat power, although a good part of the military infrastructure will perish. Most importantly, Kyiv will maintain its independence and political freedom of action.

## Post-war Internal Developments in Russia

Three distinct but intertwined developments will shape the internal situation in the Russian Federation after the current round of open fighting is over.

Firstly, Russia will accelerate various activities against Ukraine in information space, cyberspace, and the realm of clandestine political machinations. It is even likely that low-level military operations will be executed intermittently, either classical (artillery barrage, missile strike) or covert (sabotage, assassinations). Furthermore, Russia will attempt to prepare for the next large-scale military operation against Ukraine, although it will not be an easy task. After a humiliating defeat, even if it will be advertised as a victory amounting to the fall of Berlin, the Russian land forces will require time and resources to resurrect as a fighting force. It will not happen by drafting thousands of [unwilling](#) young men and dusting off older equipment kept in storage which is,

[reportedly](#), in bad condition. Instead, substantial and sustained long-term investment in hardware, training and morale is needed. Yet, sufficient funds and human resources will be difficult to muster, considering the economic decline that had been mounting for over a decade before the war with Ukraine brought massive sanctions deepening the crisis. The military production will not be excluded from the effects of the economic downturn, what [apparently](#) is already taking place. Furthermore, it seems necessary to change the doctrine of using the military and make organisational adjustments, which also will be a challenging task. All things considered, Russia will remain preoccupied with Ukraine and will continue the efforts to undermine its independence. It will, however, experience many problems which will significantly hamper those efforts.

Secondly, we will surely witness growing discontent in Russia and increasing repressions against society. Indeed, at the moment, most of the nation is [united](#) behind the leader, as most of the people, targeted by aggressive propaganda, believe that the vile West is actually staging a war of attrition against the Russian nation. But once the active phase of the hostilities is over, citizens of Russia will be more and more concerned about their own well-being. Moreover, with each passing day, more and more individuals [are getting information](#) about the slaughter of Russian soldiers and Ukrainian civilians. This process will likely accelerate. It does not mean that we expect a widespread active popular unrest soon. There are no political alternatives, no leaders and organisations which would be able to channel popular dissent. Nonetheless, the authorities will have to govern with a much [heavier hand](#) and execute [more control](#) over information space, which will be both expensive and probably largely ineffective. The economic crisis will aggravate frustration and alienation within the society, and it will not matter if Putin or the West will be blamed for hardships. Apathy and the sense of insecurity will haunt the nation and result in [increased migrations](#), lower fertility rates and declining quality of work. The decay of society will also augment the abovementioned problems with rebuilding a battered army.

And finally, on top of all, the decomposition of Vladimir Putin's powerbase will [most likely](#) occur. The Ukrainian operation was supposed to be a swift and easy victory that would bring Russia and the Russian establishment tangible benefits, prestige, and enhanced security. Instead, all sectors of the Russian elite have been badly hurt. First, the Army, cherished by Putin, rebuilt and filled with new confidence within the last decade, has been [defeated](#), [decimated](#) and humiliated. The disgrace is even worse because what has happened was relatively easily [predictable](#); even Russian military experts [warned](#) against the invasion of Ukraine. All of this happened, for the most part, due to poor planning and wishful thinking imposed by the leader. Furthermore, military brass had its share in business conducted with the West, which now is over, for the most part. Second, the security services network, which had greatly helped in Putin's ascent and remained closely aligned with him, has been betrayed. During the last decades, the *siloviki* elite has become closely intertwined with the business, particularly with hydrocarbons export. The war has destroyed most of the profit from this trade, and chances to rebuild it in the foreseeable future are slim. Third, bureaucratic echelons of various levels are also victims of the Ukrainian war. Before it started, this kleptocratic elite was busy looting Russia and Russians to transfer spoils to the West and spend them there. Now, the income is questionable, and most attractive shopping, leisure and investment destinations are off-limits. And finally, the super-rich one per cent of the society, people who supported the system until it suited them, is also severely affected. To be sure, the tycoons will remain very rich, but they are no longer part of the world's

elite, and it hurts the most. What is the use of a multimillion worth super-yacht if it is restricted to the Turkish or Persian Gulf ports and cannot be anchored in St. Tropez? What is the use of a private jet if it cannot fly its owner to New York City to show up at the premiere in Carnegie Hall? All in all, it seems evident that besides some fanatic devotees of the vision of *Ruski Mir*, there is no one left to support Putin's throne. Certainly, it does not mean that he is doomed to fall, but his demise is highly possible, though we do not know when and in which circumstances. But even if Putin remains in power for some considerable time, it is likely that he will be much weaker and will have less freedom of political action.

The likely evolution of the Russian decision-making apparatus is by far the most important internal development because only the change of government may lead to a lasting peaceful regulation of the relations with Ukraine and the world. The incumbent president is personally bent on subduing Kyiv, and it is unlikely that he is ready and able to backtrack from this position. Such a move is improbable not only because of personal attitude but also because it would amount to admitting that all the adventure in Ukraine and its horrific cost for Russians and their Ukrainian brethren was a huge mistake. This would be disastrous for Putin and his political position. But clinging to existing strategies and policies that have proven ineffective and counterproductive will increasingly alienate Putin and make them vulnerable to dissent among elites.

If elites, maybe [led](#) by the *siloviki* themselves, manage to get rid of the president and use him and his closest associates to stage some massive scapegoating operation, a sort of putinism without Putin will emerge. It would be a come back to convenient times of pure kleptocracy without [grandiose visions](#) and, first of all, without reckless attempts to put those visions before sober assessments of political, economic and military realities. In such a case, not only Russians will sigh with relief. The Western countries will be quick to seize an opportunity to rebuild at least some economic ties with Russia, even though it will take considerable time. We strongly believe that only the internal change in Russia will bring in familiar settings of the Cold War 2.0, rhetorically heated but well-controlled, to the benefit of all sides.

### **International Environment**

Two important factors will influence the international situation of the Russian Federation in the foreseeable future.

Firstly, profound worldwide economic changes are underway due to Russia's aggression. Some of them had started well before the war, while some were ignited by it. The transformation of the energy sector in the West is one of the most consequential. It will most likely spill over to other regions in the years to come. The question of stability and sustainability of the energy supply, until recently mostly brushed under the carpet, has just become a focal point of key political considerations. And it will remain so, even if Russia comes back as an energy supplier. It is because the green transition has just been justified even better than before and will therefore quicken its pace despite costs. This way, not only significant shifts in hydrocarbons extraction and trade will occur. The strategies of energetic self-reliance will remain a top priority in the West and beyond in the years to come. The economic disruptions caused by the war will also impact other sectors of the global economy, causing widespread difficulties which will result in numerous crises.

Secondly, on the political front, we are witnessing unprecedented since the Cold War unity of the western countries and the [renaissance of NATO](#). Europe is closing ranks, and the United States has jumped into the familiar setting of the leader of endangered democracies. Furthermore, when Russia decided to up the ante and threatened Ukraine to institutionalise the New Cold war on Putin's own terms, the U.S. saw the chance to increase its own power and influence. Once it was evident that the Russian president could not back from his claims, America found itself in a winning position and simply let him fall into the Ukrainian trap. This way, the United States has greatly enhanced its position as the dominant world power and champion of democracy. Surely, the present harmony among Western states is not ideal. The developed and democratic countries are not just obedient cohorts, but the American leadership, which suffered heavy blows in the last decades, will most probably be augmented permanently. In this respect, the sanctions regime will remain the backbone of Western unity and will [persist despite difficulties](#).

The abovementioned shifts in the international economy and political environment will be very harmful to Russia. Undoubtedly, while planning to conquer Ukraine, the Kremlin did consider the likely Western response and punishing sanctions. However, Moscow seemingly believed that swift military victory would serve as *fait accompli*, so the adverse effects resulting from the expectedly sluggish reaction of the purportedly divided West would be bearable and would not outweigh the benefits. Unfortunately for Russia, all of these assumptions and calculations were proven wrong. The invasion of Ukraine has already resulted in the diminishing of Russia's economic and political role, with more negative consequences likely to materialise in the future.

### **And What About Ukraine?**

The relations with Ukraine will remain one of the most important Russian foreign policy issues and one of the crucial reference points for security considerations. Even if a regime change in Moscow occurs, it will remain so because any new authority will need a conflict with Ukraine as a factor of legitimisation. However, the weakened Russia will not be able to threaten its western neighbour for years to come only by itself; the internal situation in Ukraine will also be of great importance. So, the course of Russo-Ukrainian relations will depend strongly on internal developments in Ukraine months and years after the guns fall silent. In essence, what is going to happen in Ukraine after the war is one of the most important variables of any future power balance in Europe and in the global arena.

Let us repeat the assumption that after the current phase of hostilities Kyiv will retain political freedom of action, even though the country will suffer from the degradation of its military and public infrastructures and significant material damages. It is most likely that the United States and other Western countries will quickly provide Ukraine with military and humanitarian aid to prevent an immediate repetition of the Russian incursion and alleviate the gravest woes of society. Apparently, this process has [already started](#). Next, a sort of a new Marshall Plan will be introduced to rebuild housing, infrastructure and industry in the next several years. The adoption of such a strategy will be necessary if the West wants to consolidate its upper hand over Russia after Ukraine has been saved from the direct peril. It also will be necessary to show how democ-

racy works there in comparison to the Russian autocracy. Furthermore, giving the Ukrainian people decent prospects for the future will help ease migration pressure on Europe. Last but not least, western companies will benefit from participation in the reconstruction programmes executed in Ukraine.

Despite the scale of destruction, the rebuilding of Ukraine does not necessarily pose a very difficult task, even if it is to take years. The combined economic capabilities of the Western world are of such magnitude that the transfer of billions of dollars every year for Ukraine's reconstruction will easily be mustered once the political consensus is reached. Compared to the original Marshall Plan, the new one will be much easier to perform, and Ukraine will most likely resurrect within a decade. Additionally, strong economic and political ties with the West will allow Ukraine to significantly enhance its armed forces' capabilities, which will likely deter Russia from invading its neighbour again.

But there is one single and most important precondition for the new Marshall Plan to succeed. Ukraine must quickly reform its dysfunctional politics, radically improve governance and change its whole economic system. It is not only because the management of a massive financial assistance will require proper organisation. The most crucial is the issue of political approval of the Ukrainian system of governance by donor countries. Any uncertainty as to the ability of Kyiv to properly manage the international assistance will slow down the flow of money and hamper the overall effort. If the huge financial aid is to make any sense, Ukraine must become the model of a well-governed accountable democracy, and not a grey zone full of murky businesses and dubious political entanglements of shady characters from criminal spheres.

Such a profound reorganisation of the whole country is an enormous task, taking into account corruption, administration ineffectiveness, and the economy deeply rooted in the communist past. Furthermore, political infighting may emerge right after the war ends, what would cement bitter political divisions and result in deadlocks in important legislative processes. Particularly, nationalist groupings, emboldened by the victory over Russia, may try to impose their radical worldview, even with the use of undemocratic means. Moreover, political entities linked with the Ukrainian tycoons may try to take advantage of reconstruction to illegally channel western funds. In effect, the external effort to rebuild Ukraine may be hampered by the internal deficiency of the country, which is very likely.

Therefore, it is our assessment that Ukraine will not be able to utilise the chance it will be given in full. We expect that the economic reforms will be partial, and the nationalist upsurge will badly hurt the country's politics. We also do not believe that governance in Ukraine will be quickly improved in substantial terms. The country will surely be reformed to an extent, but it is doubtful whether that is enough to effectively consume all the assistance it will be offered by the West. Instead, we will witness demands and aspirations from the Ukrainian side, which will not be followed by the making of a proper environment for an effective execution of a Marshall Plan 2.0. In effect, the military threat from Russia and Moscow's influence in Ukraine will remain an unsolved problem.

## Conclusion

The Russian war against Ukraine will result in the following main consequences for Russia itself, provided that the abovementioned assessment is correct.

1. Russia will not achieve the desired outcome to overthrow Ukraine's government and effectively turn this country into part of Russia by military means. It is more plausible that Moscow will have to be content with control over parts of Southern and Eastern Ukraine.
2. Ukraine will not be able to utilise a chance to integrate into the western economic and political community. It will surely gravitate closer to the West and will be able to initiate a reconstruction process but with much less success than it would be possible, given the amount of assistance that will be available.
3. Thus, Russia will achieve a partial success in the long run because Ukraine will not become a full-fledged part of the West. This way, Russia will have some opportunities to influence Ukraine or may try to invade it in future.
4. But that will be a pyrrhic victory, as Russia will suffer a great deal of economic hardships due to the Western sanctions, which are likely to persist for years, even if the regime change in Moscow occurs. This way, Russia will remain relatively weak, preoccupied with internal issues, what would hinder its effort to take advantage of opportunities to subjugate Ukraine. Furthermore, it is worth noting that even without the war Ukraine was not likely to become economically and militarily integrated with the West for decades to come. Thus, all the pains that Russia inflicted upon itself are in vain.
5. The regime change in Russia is likely, which will reduce but by no means eliminate the threat to Ukraine. However, to a great extent, it will normalise relations with the West, but this does not mean immediate changes in the sanctions regime.
6. From the global point of view, Russia's economic and political significance will diminish in the foreseeable future. Only bold political and economic reforms could bring Russia back to the status of world power, but even if it happens, it will take years or even decades to materialise.

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